



Here is a quick, helpful checklist to help you gather the core information you will need to complete the online customer acquisition capability assessment. We recommend having a 2-3 hour session with your team to discuss and review your data. Be sure to note any assumptions or methods you used to calculate your benchmarks, this will ensure consistency over time when re-assessing and measuring your progress in the future. Once you have your data collected and have completed the assessment we will let you know which areas you are strong, which can benefit from optimization and how you compare to your peers in the eco system.

Sales Motion

1. Sales Process: Do you have a defined (documented) sales process?	Yes	No
Answer	Assumptions/Method	
2. Research: Does your organization subscribe to a data service (First Research, D&B Hoovers, InsideView, etc.)?	Yes	No
Answer	Assumptions/Method	
3. Sales Assets: How many repeatable (pre-configured) sales assets have you developed (alignment communications, demonstration plans, proposals)?		
Answer	Assumptions/Method	
4. Sales Plays: How many documented sales plays have you developed?		
Answer	Assumptions/Method	
5. Advisory Services: Do you offer packaged consulting service offerings during the sales cycle?	Yes	No
Answer	Assumptions/Method	
6. Technical Pre-Sales: Do you have dedicated (full time) pre-sales technical resources?	Yes	No
Answer	Assumptions/Method	
7. Solution Demonstrations: Do you have pre-defined use case demonstration scenarios?	Yes	No
Answer	Assumptions/Method	
8. Opportunity Reviews: Do you have a defined opportunity review process (with documented go/no go criteria)?	Yes	No
Answer	Assumptions/Method	
9. SQL Conversion: What percentage of your sales qualified leads (SQL) convert to Opportunities?		
Answer	Assumptions/Method	
10. Opportunity Win Rate: What is your average win rate?		
Answer	Assumptions/Method	
11. Sales Cycle Duration: How would you describe your average sales cycle duration?		
Answer	Assumptions/Method	
12. Markets Sell Into: How many of the following market segments do you sell into - SMB, Mid Market, Enterprise?		
Answer	Assumptions/Method	
13. Length of Average Sales Cycle SMB: If you sell into the SMB market - on average, how long is your sales cycle?		
Answer	Assumptions/Method	
14. Length of Average Sales Cycle Mid Market: If you sell into the Mid Market - on average, how long is your sales cycle?		
Answer	Assumptions/Method	
15. Length of Average Sales Cycle Enterprise: If you sell into the Enterprise market - on average, how long is your sales cycle?		
Answer	Assumptions/Method	
16. Time Spent Selling: What percentage of their time do sales professionals engage in sales activities? (vs admin, meetings, customer service, travel)		
Answer	Assumptions/Method	
17. Remote Sales: What percentage of your opportunities are sold remotely?		
Answer	Assumptions/Method	

Sales Management

18. Sales Plan: Do you build a formal written annual sales plan?	Yes	No
Answer	Assumptions/Method	
19. CRM: Do you leverage a customer relationship management (CRM) tool to manage your sales opportunities?	Yes	No
Answer	Assumptions/Method	
20. Opportunity Management: How frequently do you review pipelines and opportunities?		
Answer	Assumptions/Method	
21. Customer Acquisition Costs: Do you capture and measure CAC (money + time spent) / number of customers acquired	Yes	No
Answer	Assumptions/Method	
22. Compensation: Are your sales professionals compensated for MRR and/or cloud-specific revenue?		
Answer	Assumptions/Method	

23. Payment Structure: What do you pay sales commissions on?

Answer

Assumptions/Method

24. Cloud Sales Compensation: Are your sales professionals compensated for MRR and/or cloud-specific revenue?

Yes

No

25. Sales Attainment: Describe your Target vs. Achievement success over the past four quarters.

Answer

Assumptions/Method

26. Forecast Accuracy: How accurate were your sales forecasts across the past four quarters?

Answer

Assumptions/Method

27. Sales Growth: What is your anticipated YoY sales revenue growth?

Answer

Assumptions/Method

28. Cloud Customers: What percentage of your customer base has transitioned to the cloud?

Answer

Assumptions/Method

Marketing Investment & Resources

29. Marketing Staff - How many full time equivalent marketing resources do you have, including employees or contract resources.

Answer

Assumptions/Method

30. Overall Marketing Budget - What percentage of revenue do you spend on marketing?

Answer

Assumptions/Method

31. Marketing Automation Tools - Do you use marketing automation tools, such as Marketo, ActOn, ClickDimensions?

Yes

No

32. Organizational Structure - What is your sales and marketing structure?

Answer

Assumptions/Method

33. Marketing Skills Development - How do you ensure your marketing team develops new skills and stays up to date on best practices.

Answer

Assumptions/Method

Marketing Strategy and Planning

34. Marketing Plan: Do you have a formal, written and approved annual marketing plan?

Yes

No

35. Performance Measurement: How do you measure and demonstrate the effectiveness of your marketing investments?

Answer

Assumptions/Method

36. Marketing Spend: How do you determine what level of investment you will make in acquiring new customers?

Answer

Assumptions/Method

37. Value Proposition: Do you have a formal, consistent value proposition statement you incorporate in all your sales and marketing material?

Yes

No

38. Competitive Differentiation: If we asked 3 people at your company what your core differentiation is, would we get the same, consistent answer?

Answer

Assumptions/Method

39. Market Segmentation: Do you have target vertical customer segments defined?

Yes

No

40. Industry Go-To-Market Strategy: Do you have an industry specific GTM strategy?

Answer

Assumptions/Method

41. Geographic Scale: How many countries do you have customers in?

Answer

Assumptions/Method

42. Traditional vs. Digital Marketing: Do you use more face-face events, print, direct mail, phone marketing tactics versus online?

Answer

Assumptions/Method

Marketing: Is the majority of your marketing activity outbound (cold calling, cold email, tradeshow) or do you use content and thought leadership to attract interest (blogs, email, SEO)?

Answer

Assumptions/Method

43. Direct vs. Channel: How to you bring your products and services to market?

Answer

Assumptions/Method

44. Nurture Calendar: Do you have a 12 month marketing nurture calendar that informs all your marketing content development? Yes No
45. Video Strategy: Do you have a commitment to video and a formal strategy? Yes No
46. Customer Focused Marketing: Do you focus your marketing predominantly on acquiring new customers or on upselling existing?

 Answer

 Assumptions/Method

Marketing Effectiveness and ROI

47. Bounce Rate: What is your homepage bounce rate average in the past 12 months (Google Analytics)?

 Answer

 Assumptions/Method

48. Time Engagement: Average minutes per session during the past 12 months (Google Analytics)?

 Answer

 Assumptions/Method

49. Page Engagement: Average number of pages viewed per visit over the past 12 months?

 Answer

 Assumptions/Method

50. Lead to MQL Conversion: What is your typical conversion rate from lead to marketing qualified lead?

 Answer

 Assumptions/Method

51. Typical Number of Views on Social Posts: When you post on social media, how many views do you usually get, on average?

 Answer

 Assumptions/Method

52. Social Media Conversion: Are your activities on social media converting to leads?

 Answer

 Assumptions/Method

53. Email Open Rates: What is your average open rate on email campaigns?

 Answer

 Assumptions/Method

54. Click Through Email Rates: What is your average click through rate on most email campaigns?

 Answer

 Assumptions/Method

55. Paid Advertising Conversion: What is your typical click through rate (CTR) on paid advertising?

 Answer

 Assumptions/Method

56. Getting Found via Search Engines: Which search activity is providing you with the most leads - Organic SEO or Paid?

 Answer

 Assumptions/Method

57. Blogs: How often do you publish blogs?

 Answer

 Assumptions/Method

58. Remote Selling Enablement: Have you created specific assets designed to help sales people drive a remote or shorter sales cycle? (i.e. sales videos, scripted demos, recorded webinars, templated proposals)?

 Answer

 Assumptions/Method

59. Case Studies: Do you invest in creating customer case studies?

 Answer

 Assumptions/Method

60. Thought Leadership: How often do you publish or share non product specific educational content? Blogs/videos/eBooks, etc.

 Answer

 Assumptions/Method

61. Measurement: Do you track and have the ability to report ROI in revenue marketing terminology (MRR/MQL/RFY). Yes No
62. Agile Marketing: How often do you leverage data to inform and optimize future marketing performance across owned and paid channels e.g. website and social? Yes No

Demand Generation & Scalability

63. Dependency on Word of Mouth: What percentage of your new deals come from existing customer referrals?

 Answer

 Assumptions/Method

64. Website Leads: How many leads have you generated per month on average over the past 12 months from your website? (contact us form, newsletter sign up, downloads, etc.)

 Answer

 Assumptions/Method

65. Customer Referral Leads: How many leads have you generated per month on average over the past 12 months from existing customer referrals?

Answer

Assumptions/Method

66. Events: How many leads have you generated per month on average over the past 12 months from events (digital events, Msft industry, etc.)?

Answer

Assumptions/Method

67. Leads from Microsoft: How many leads have you generated per month over the past 12 months from Microsoft partner center or sellers?

Answer

Assumptions/Method

68. Paid Advertising: How many leads have you generated per month on average over the past 12 months from paid advertising? (digital or other)

Answer

Assumptions/Method

69. Microsoft Commercial Marketplaces: How many leads have you generated per month on average over the past 12 months from this lead source?

Answer

Assumptions/Method

70. Non-Paid Digital Campaigns: How many leads have you generated per month on average over the past 12 months from all other sources not listed above?

Answer

Assumptions/Method

71. Global Market: What percentage of your new deals come from outside of your country?

Answer

Assumptions/Method

Emotional Engagement Level

72. Video Capability: Do you have videos on your website?

Answer

Assumptions/Method

73. Educational Content: Do you have white papers, eBooks, self assessments and other on your website for prospects to download? Yes No

74. Visual Engagement: Do you have photos of people on your website and marketing assets?

Answer

Assumptions/Method

75. Action Engagement: Have you implemented a chat feature on your website? Yes No

76. Transparency: Do you have your pricing visible to prospects on your website? Yes No

77. Trust: Do you tell prospects what you will do with their data on your website / when you capture their data in a form? (privacy policy, cookies etc.)

Answer

Assumptions/Method

78. Curiosity: Do you ask prospects questions on your website, vs statements and claims? i.e. Need to better enable your remote workers?

Answer

Assumptions/Method

79. Advocacy: Does your website feature either video testimonials?

Answer

Assumptions/Method

80. Proof: Do you have quantifiable claims regarding outcomes and results you can have customers achieve visible on your website? Yes No

81. Pain-Based Messaging: Do you have information that tells prospects WHY they need to buy your solution rather than just providing a description of what the products or services you provide?

Answer

Assumptions/Method

82. Persona Buying Journey: Do you have menu choices on your website for visitors based on who they are? Yes No

83. Always-On Content: Do you maintain a current and always-on Microsoft Cloud digital presence and content marketing strategy? Yes No

84. Trials: Do you offer free trials or free apps? Yes No

85. Community Self-Identification: Do you call out and speak about industry specific challenges and needs in your messaging? Yes No

Cloud Growth & SaaS Transformation

86. Cloud Revenue Growth: How much has your cloud revenue grown from last year to this year?

Answer

Assumptions/Method

87. Services Gross Margin: What is your average gross margin, blended across all your services?

Answer

Assumptions/Method

88. 3 Clouds: What is the composition of your revenue - Azure vs Business Applications vs Modern Work?

Answer	Assumptions/Method		
89. COVID Impact: During the first 6 months of COVID what was the impact on our sales revenue?			
90. COVID Recovery: Is your revenue currently at pre-COVID levels?		Yes	No
91. Cloud Deal Momentum: In the past 12 months, what percentage of your new deals were cloud vs on premise?			
92. New Customer Adds: How many new customers did you add in your most recent fiscal year?			
93. One Time vs. Annuity: What percentage of your total revenue today is recurring vs one time?			
94. Total Number of Active Customer Today: What is your active cloud customer base, in total?			
95. Attrition: Current annual attrition rate on subscriptions? (or Churn rate)			
96. Cloud Pricing Model - Software: Do you offer monthly tiered subscription license offers?		Yes	No
97. Cloud Pricing Model - Services: Do you offer monthly tiered subscription services offers?		Yes	No
98. Cloud Pricing Model - Implementation: Do you offer fixed price implementation or outcome based offers?		Yes	No
99. CLV Attainment Time Frame: What percentage of the total customer lifetime value do typically get within the first 12 months?			

Offer Development, Accelerated Deployment and Customer Success

100. Co-Sell Readiness: How many co-sell ready solutions do you have in market?			
101. Offer in Microsoft Commercial Marketplace: How many offers/solutions do you have on AppSource / Azure Marketplace / Team's apps store?			
102. Customer Success: Do you have dedicated resources (i.e. customer success managers) who own existing customer relationships?			
103. Online Training: Do you have an online training platform to educate customers and to drive adoption for customers?		Yes	No
104. Time To Go Live: What is the average number of days to first deployment across most of your customers?			
105. Support: Do you have an unlimited customer support option/package?		Yes	No
106. Automated Demos: Do you have short 5-10 minute self running product demos?			
107. Community Creation: Do you have how online customer forums, host customer conferences or user groups/meetings where customers have a two way opportunity to communicate with you and each other?		Yes	No
108. Business Impact: Do you measure and quantify customer business impacts and KPI's after your projects and implementations go live?			
109. Upsell Ability: How good are you at getting additional revenue from customers after the initial purchase?			
110. Power Apps: Have you built and taken to market Power Apps?		Yes	No
111. Industry IP: Do you have industry specific optimized products and services?			