

# Lead Management SLAs and How to Measure Them in Salesforce

# Hi, I'm Todd



Todd Sprinkel, Principal Solution Architect at [Sponge.io](https://sponge.io)

- Salesforce Certified Advanced Admin
- Technician Award winner, 2022 MOPsIES
- [todd@sponge.io](mailto:todd@sponge.io)
- 13 years of experience in marketing/sales ops
- Previous Companies: Logi Analytics, Snagajob



# Today we're talking about creating Lead Management SLAs and measuring them in Salesforce

- How to build SLA automations to streamline processes
- How reporting can remarkably improve SLA compliance



# We all want to just call the damn leads

But there are hurdles:

- Sales Managers (understandably) spend most of their time on pipe management, not early lead or opp management.
- Most SLA reports look back at the mistakes we already made last week/month/quarter, after we ghosted. Sad trombone. 🎺

True story:

A recent Sponge client was (rightfully) appalled they hit the MQL follow-up SLA **just 30%** of the time.

After implementing this project, SLA compliance reached **85% within 2 months.**

# SLA explainer



# Back up, what's an SLA?

SLAs are [Service Level Agreements](#).

It's a fancy way of saying Marketing and Sales leadership have agreed how quickly and thoroughly MQLs will be called/emailed by AEs or BDRs.

# SLAs aren't aspirational

They're blueprints of the vital handoff points between Marketers, BDRs, and AEs:

- Who's responsible for the contact at each stage?
- What information do we need before a contact gets qualified?
- How long does a BDR/AE have to call or email someone at each stage?
- If that BDR/AE doesn't meet the SLA, do we reassign the lead?
- When do BDRs/AEs (and their managers) get alerted?

# Without automation, SLAs look like:

“AEs or BDRs need to call leads within 24 hours.”

*And when they don't... we might notice next month/quarter during reporting, and we'll reassign the now-cold leads \\_(ツ)\_/*

<input type="checkbox"/> Funnel Stage ↑ ▾	Created Date ↑ ▾	Subject ▾	First Name ▾	Last Name ▾	Completed Date/Time ▾
<input type="checkbox"/> MQL (1)	October 2023 (1)	Call	Test	Last Status Update	10/2/2023 2:48 PM
	<b>Subtotal</b>				
<b>Subtotal</b>					

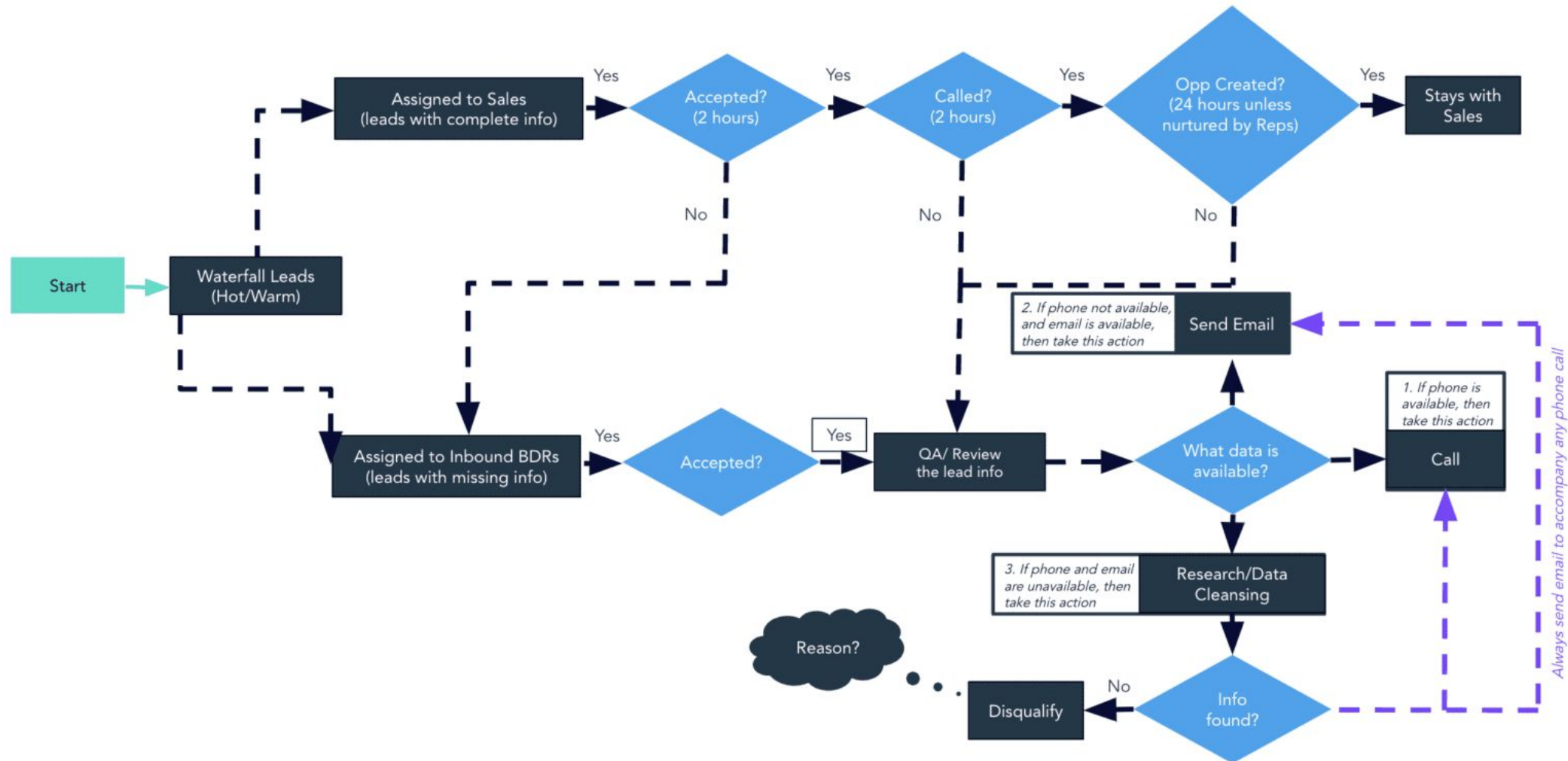




# With automation, SLAs look like:


- “When AEs get an MQL, they have 2 hours to accept/reject, or it will be reassigned to a BDR.
- “Once AEs accept a lead, they have 2 hours to log a call, or it will be reassigned to a BDR.
- “After logging the first call, the AE must log a follow up task for the future.
  - If no follow up is logged, after 1 day, the lead is re-assigned to a BDR.
  - If a follow up is logged, the AE will lose the lead 1 day after the follow up expires, unless another follow up is logged.
- “1 day after a follow up expires, if it has been more than 21 days since the AE accepted, the lead will be recycled.”

# Here's a fancy lead waterfall with these SLAs and their fallbacks:



# Making SLAs digestible for end users

But then I simplify the alert waaaaay down, to a green/red flag on leads in the queue using a custom Salesforce formula field that takes advantage of the IMAGE function. At a glance, reps (and their managers) have a live view of which leads still need to be worked.

Even though the automation behind the scenes is sophisticated, the flags are quickly/easily understood. If the flag is red  you need to pick up the phone.



# Simple flag alerts for SLAs

Contacts  
===UK Direct Waterfall Lead View

50+ items • Sorted by SLA Flag • Filtered by all contacts - 4 more filters applied • Updated a few seconds ago

Import Add to Campaign Send List Email Add to Watch List

Search this list...

	S. ↑	Account Name	Le...	C...	C...	Li...	Date: Last ...	Name	Industry	Title	Phone	Stage	Con...
1	<input type="checkbox"/>		Cold	5	3		8/13/2020		Financial Services & In...	Data Architect		2) Active Opportunity	
2	<input type="checkbox"/>		Cold	0	0		10/27/20...		Other	CEO		2) Active Opportunity	
3	<input type="checkbox"/>		Cold	0	0				Other	Analysis Head of Data		2) Active Opportunity	
4	<input type="checkbox"/>		Cold	0	0				Business Services			1) Customer	
5	<input type="checkbox"/>		Cold	4	0				Business Services	Director, DC Product ...		2) Active Opportunity	
6	<input type="checkbox"/>		Cold	0	0		7/27/2020		Healthcare	Data & Analytics Mana...		2) Active Opportunity	
7	<input type="checkbox"/>		Cold	1	1				Business Services	Associate Director, Pro...		2) Active Opportunity	
8	<input type="checkbox"/>		Cold	0	0				Software	DBA		1) Customer	
9	<input type="checkbox"/>		Cold	0	0				Software	Global Head, Data Tec...		1) Customer	
10	<input type="checkbox"/>		Cold	0	0					Director, Strategic Pro...		5) Suspect	
11	<input type="checkbox"/>		Cold	0	0				Computers and Techn...	Product Manager		2) Active Opportunity	
12	<input type="checkbox"/>		Cold	0	0				Financial Services & In...	Team Coordinator and...		5) Suspect	
13	<input type="checkbox"/>		Cold	0	0				Business Services	Product Manager		2) Active Opportunity	
14	<input type="checkbox"/>		Cold	0	0				Financial Services & In...	Manager, Product Dev...		5) Suspect	
15	<input type="checkbox"/>		Cold	0	0				Business Services	Executive Director, Ca...		2) Active Opportunity	
16	<input type="checkbox"/>		Cold	1	0				Business Services	Global Head, Core An...		2) Active Opportunity	
17	<input type="checkbox"/>		Cold	0	0				Business Services	Analytics Solutions & ...		2) Active Opportunity	
18	<input type="checkbox"/>		Cold	0	0				Business Services	Associate Director, He...		2) Active Opportunity	
19	<input type="checkbox"/>		Cold	0	0				Financial Services & In...	Senior Project Manag...		5) Suspect	

History



# SLAs I recommend



# Start *somewhere*

- MQL handoff point
  - Must be accepted/rejected within X amount of time
  - *Max 2 business days, IMO*
  - The quicker the better
- Once accepted, time to first outreach
  - Call/Email/Add to sequence within X amount of time
  - Ideally automated, but again, the sooner the better
  - Mix of email and phone – and phone within 24 hours
- Minimum expected follow up
  - e.g. X calls in X days
  - No one-and-dones



# Tailoring SLAs to your team



# Things to consider when crafting an SLA

- Do you have a BDR team?
- Is follow up split amongst multiple teams?
- Do you have Users in multiple time zones?
- What's the current SotU? Is there an existing SLA?
- What does volume look like?
- Be realistic.





# Good/better/best

## Good

- MQL datetime
- SAL datetime
- Difference in business hours

## Better

- First touch after MQL
- # of touches after MQL

## Best

- Full funnel tracking
- First touch + # of touches each stage
- Real-time and historical reporting



# Building SLA automations



# Difference between 2 Datetimes in Business Hours

```
ROUND( 8 * (
  ( 5 * FLOOR( ( DATEVALUE( date/time_1 ) - DATE( 1900, 1, 8) ) / 7) +
    MIN(5,
      MOD( DATEVALUE( date/time_1 ) - DATE( 1900, 1, 8), 7) +
      MIN( 1, 24 / 8 * ( MOD( date/time_1 - DATETIMEVALUE( '1900-01-08 16:00:00' ), 1 ) ) )
    )
  )
-
  ( 5 * FLOOR( ( DATEVALUE( date/time_2 ) - DATE( 1900, 1, 8) ) / 7) +
    MIN( 5,
      MOD( DATEVALUE( date/time_2 ) - DATE( 1996, 1, 1), 7) +
      MIN( 1, 24 / 8 * ( MOD( date/time_2 - DATETIMEVALUE( '1900-01-08 16:00:00' ), 1 ) ) )
    )
  )
),
0)
```

## Key:

- Number of hours in a business day
- Start time of a business day in UTC (Note: NOT DST-aware!!!)
- Current formula based on 8-hour workday starting at 9AM PDT (UTC -7)



# First touch SLA flag

```
CASE(  
  CASE(  
    TEXT(Funnel_Stage__c),  
    "MQL", IF( Funnel_Stage_Age_in_Business_Hours__c > 8, 0, 2),  
    "SAL", IF( AND( ISBLANK(First_Touch_This_Stage__c), Funnel_Stage_Age_in_Business_Hours__c < 1), 2,  
      IF(  
        OR(  
          ISBLANK(First_Touch_This_Stage__c),  
          Time_to_First_Touch_in_Business_Hours__c > 1  
        ),  
        0,  
        1  
      )  
    ),  
    1  
  ),  
  2, IMAGE("/img/samples/flag_yellow.gif", "Yellow"),  
  1, IMAGE("/img/samples/flag_green.gif", "Green"),  
  0, IMAGE("/img/samples/flag_red.gif", "Red"),  
  IMAGE("/img/msg_icons/error16.png", "Error")  
)
```

## First touch SLA:





- MQLs must be accepted/rejected within 1 business day (8 business hours)
- Once accepted, must be touched within 1 business hour



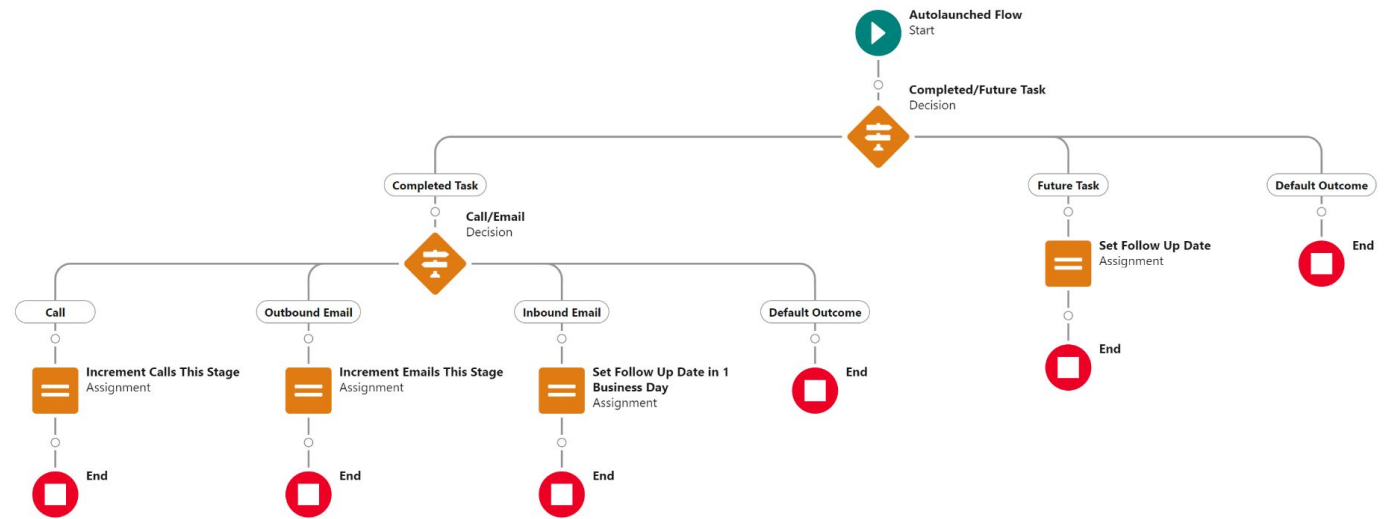
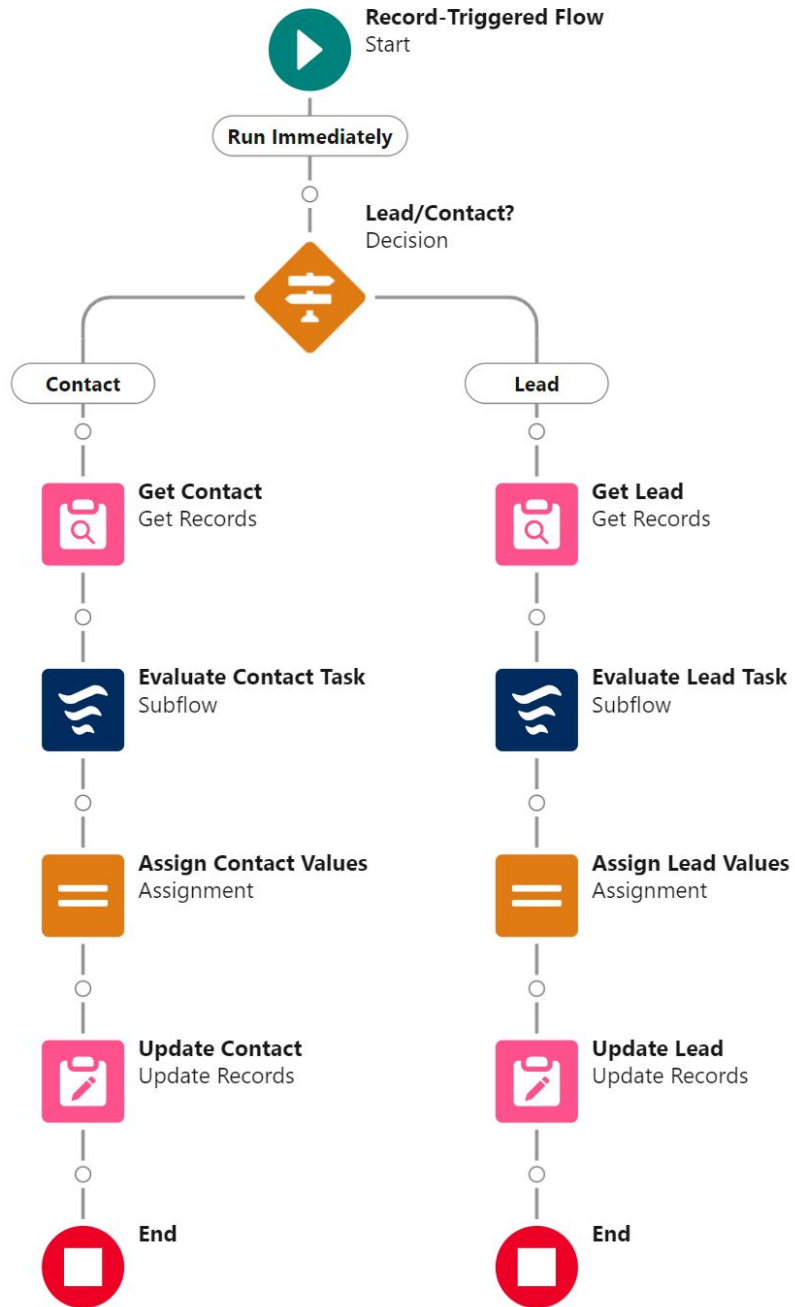
# Follow up SLA flag

```
CASE( CASE(TEXT(Funnel_Stage__c),
  "SAL",
  IF(
    ISBLANK(First_Touch_This_Stage__c), 0,
    IF(
      Follow_Up_Date__c > TODAY(), 1,
      IF(
        AND(
          OR( ISBLANK(Phone), Calls_This_Stage__c >= 5, Calls_This_Stage__c >=
Business_Days_Since_First_Touch__c),
          OR( ISBLANK(Email), Emails_This_Stage__c >= 5, Emails_This_Stage__c >=
Business_Days_Since_First_Touch__c)
        ), 1, 0))),
  /*DEFAULT VALUE FOR OTHER STAGES*/
  1
),
2, IMAGE("/img/samples/flag_yellow.gif", "Yellow"),
1, IMAGE("/img/samples/flag_green.gif", "Green"),
0, IMAGE("/img/samples/flag_red.gif", "Red"),
IMAGE("/img/msg_icons/error16.png", "Error")
)
```

## Follow Up SLA:

- SALs
  - If untouched, Red 
  - If Follow Up Date in the future, Green 
  - If Phone populated, calls this stage must be  $\geq$  the number of business days since the first touch (up to 5)
  - If email is populated, emails this stage must be  $\geq$  the number of business days since the first touch (up to 5)
  - Else, Red 
- All other stages, Green 





# If formulas aren't good enough...

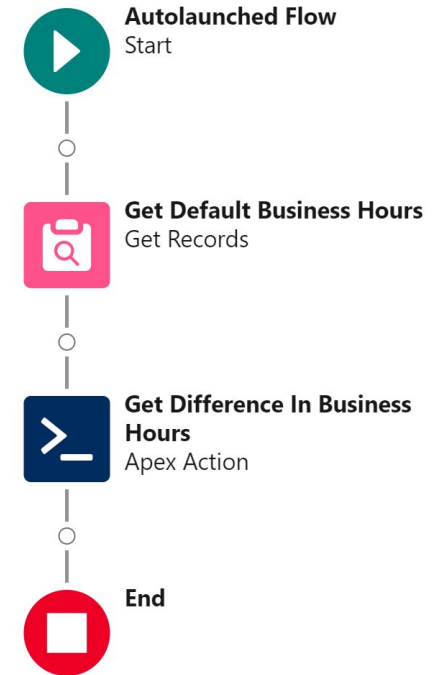
If you need to support...

- Multiple time zones
- Holidays
- DST

...you'll likely need Apex

- [Unmanaged package](#) with sample Flow
- Extended version of [this package](#) from UnofficialSF

But remember, *start somewhere*



business hours

Company Settings

Business Hours

Didn't find what you're looking for? Try using Global Search.

## Business Hours

### Organization Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

[Holidays \[2\]](#)

#### Business Hours Detail

Edit

Business Hours Name	Default	Time Zone
Business Hours	Sunday No Hours Monday 9:00 AM to 5:00 PM Tuesday 9:00 AM to 5:00 PM Wednesday 9:00 AM to 5:00 PM Thursday 9:00 AM to 5:00 PM Friday 9:00 AM to 5:00 PM Saturday No Hours	(GMT-04:00) Eastern Daylight Time (America/New_York)
Active	<input checked="" type="checkbox"/>	Default Business Hours <input checked="" type="checkbox"/>
Created By	Todd Sprinkel 6/4/2019 11:49 PM	Last Modified By Todd Sprinkel 10/11/2023 5:22 PM

Edit

#### Holidays

Add/Remove

Holiday Name	Description	Date and Time
<a href="#">Christmas</a>		12/25/2023 All Day
<a href="#">Christmas Eve</a>		12/24/2023 All Day

[Back To Top](#)

Always show me [more](#) records per related list





Reporting can remarkably  
improve SLA compliance



# Seeing SLAs = better SLAs

Usually when I turn on the flags, 70% of the queue is red. It's the first time the team realizes there's a problem:

- the timelines or process are simply unrealistic
- we don't have enough people working leads
- our people don't know how to follow the process
- or all of the above 😬

We want to be at least 90% in compliance. And we want to realistically expect every BDR/AE to have a list of green flags  before signing off each day.



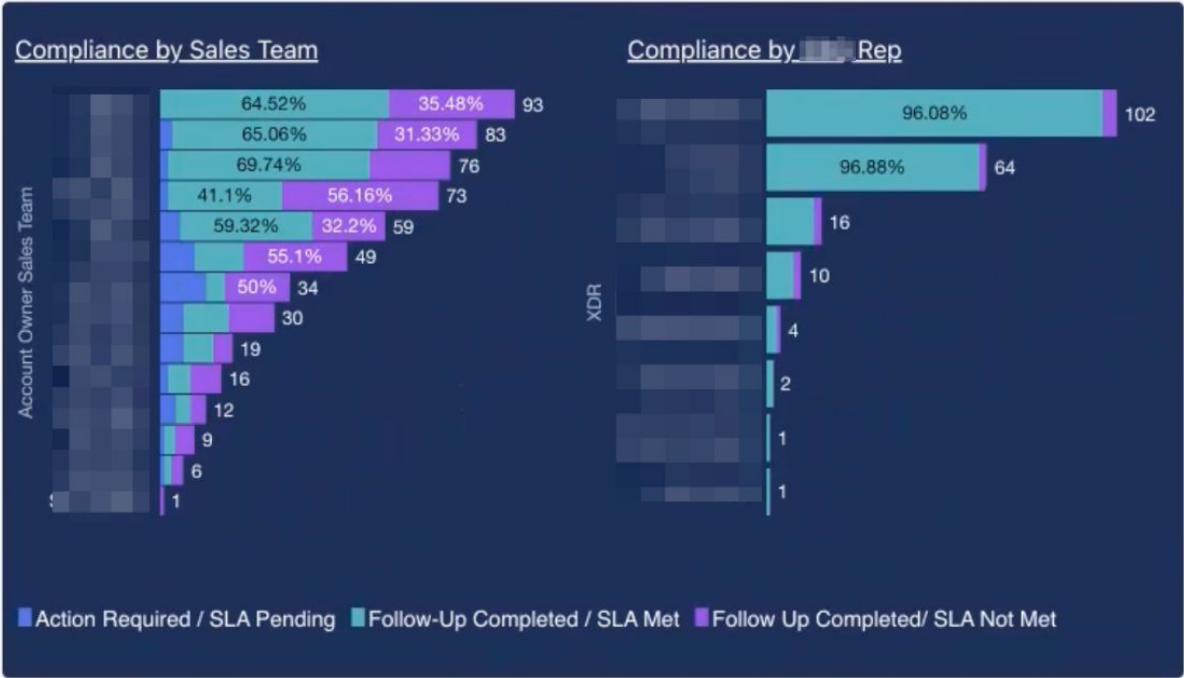


Lead Status All	SLA Flag All	Parent Campaign All	Campaign Name All	Lead/Contact Owner All	Lead / Contact Sales Team All	Owner's Manager All
Lead/Contact Name All	Legacy BU All	Top Line Bucket All	XDR All	Account Owner All	Account Sales Team All	Account Owner's Manager All

Overall SLA Compliance Percentage



SLA Details by Rep



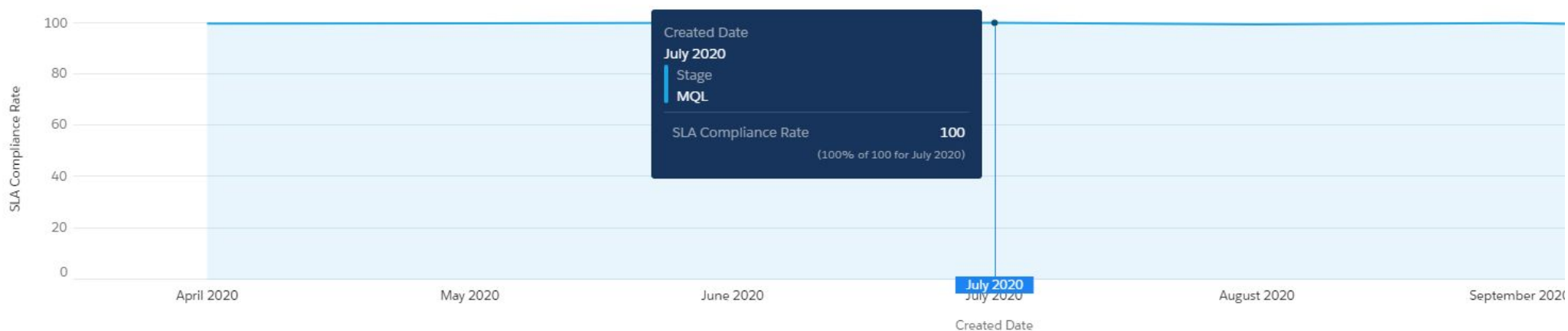
Name	Company / Account	SLA Flag	Lead Status	Lead Owner Name	XDR	MQL Date	XAL Date	SAL Date	Rep Assignment	Account O
		Follow-up Completed / SLA Met	XDR Accepted Lead			2023-08-22	2023-08-22		External Telemarketing Agency	

	Q1	Q2	Q3	Q4
Action Required / SLA	42% Sales 23% 24%	2% Sales 9% 1%	3% Sales 15% 1%	4% Sales 29% 0%
Follow -up Completed / SLA Met	20% Sales 0% 42%	55% Sales 36% 55%	85% Sales 42% 92%	92% Sales 44% 100%
Follow -up Completed / SLA Not	38% Sales 77% 34%	44% Sales 55% 45%	12% Sales 43% 7%	3% Sales 27% 0%



# Fantastic reporting with the funnel

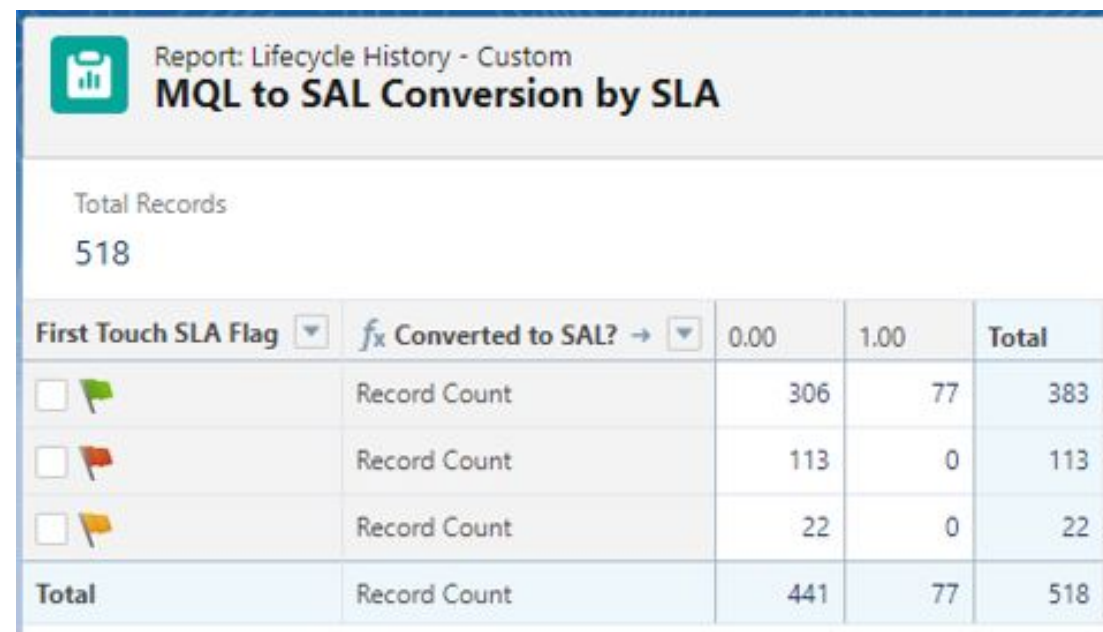
When combined with a custom funnel history object, we can capture historical SLA compliance – directly in Salesforce:



Created Date →		April 2020			May 2020			June 2020		July 2020		August 2020			September 2020			October 2020		Total							
Stage ↑	SLA Compliant →	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Subtotal	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Subtotal	<input checked="" type="checkbox"/>	Subtotal	<input checked="" type="checkbox"/>	Subtotal	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Subtotal	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Subtotal	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Subtotal							
<input type="checkbox"/> MQL	SLA Compliance Rate	3	1,011	99.70%	2	812	99.75%	814	996	100.00%	996	861	100.00%	861	5	828	99.40%	833	1	1,426	99.93%	1,427	5	279	98.24%	284	6,229
<b>Total</b>	SLA Compliance Rate	3	1,011	1,014	2	812	814	996	996	861	861	5	828	833	1	1,426	1,427	5	279	284	6,229						
	Record Count																										




# A case study

*"We activated Sponge's funnel history custom object with automated SLA measurement just two months ago and it's already been instrumental in driving growth for us. We immediately realized that our time to first touch and follow up was really lagging, and with the visibility we now have, we've been able to easily ensure MQLs are acted on quickly and consistently. As a result, we've seen around a 50% lift in conversion from Demo to Opportunity."*



Report: Lifecycle History - Custom  
**MQL to SAL Conversion by SLA**

Total Records  
518

First Touch SLA Flag	fx Converted to SAL? →	0.00	1.00	Total
<input type="checkbox"/> 	Record Count	306	77	383
<input type="checkbox"/> 	Record Count	113	0	113
<input type="checkbox"/> 	Record Count	22	0	22
<b>Total</b>	Record Count	441	77	518



# TL;DR

1. Agree on detailed SLAs and the fallback processes
2. Automate those processes to speed them up and prevent human error
3. Help BDRs or AEs call leads that need calling
4. Actually report on SLA compliance and tweak the rules (or train the reps)





# Thank you!



Todd Sprinkel, Principal Solution Architect at [Sponge.io](https://sponge.io)  
[todd@sponge.io](mailto:todd@sponge.io)

