**Strategic Alignment Worksheet: Sales and Marketing**

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**Overview**

Use this Strategic Alignment Worksheet (SAW) to help you complete the sections listed below. As you progress through the course, you will be instructed to complete and submit section(s) of the SAW. Once you have all of the sections completed, you are to incorporate the sections into the larger Atha Execution Plan, which is your final project deliverable (to be submitted in Unit 5).

**Sections of the SAW**

* Goals and Activities *(Unit 2)*
* Interview Questions *(Unit 3)*
* Department Purpose Statements *(Unit 4)*
* Performance Standards *(Unit 4)*

**Checklist for Sales and Marketing Area**

Mary Atha, CEO, has provided this checklist of overall organization goals for the sales and marketing area. Read the checklist and use it as a point of reference for your development of this SAW.

1. Double Atha sales without lowering price.
2. Increase international sales.
3. Ensure accurate on-time delivery.
4. Plan, organize, lead, and control the resources of sales and marketing department to meet company goal of growing the business by 100%.
5. **Goals and Activities**.Develop goals and activities for the sales and marketing area**.** Submit this section in Unit 2.

| **Goals** | **Activities to support this goal** (add more rows if needed) |
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| 1. Retain existing employees.
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| What are the supporting activities?  | How will this activity achieve the goal? | What is the achievement deadline? |
| Make sure all employees are up to date and experience with sales and marketing | Experienced employees will know exactly how to sell products and take care of customer service  | 30 days |
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| 1. Add seven new employees.
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| What are the supporting activities?  | How will this achieve the goal? | What is the achievement deadline? |
| Work with human resources to create job postings and job fairs | It will quickly help us hire more staff  | 60 days |
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| 1. Create new organization chart for the sales and marketing area.
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| What are the supporting activities?  | How will this achieve the goal? | What is the achievement deadline? |
| Create a descriptive chart detailing sales procedures and profits | Help eliminate any procedures where cost is not effective | 10 days |
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| 1. Improve employee performance.
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| What are the supporting activities?  | How will this achieve the goal? | What is the achievement deadline? |
| Set goals and rewards | Employees will work harder to achieve set goals and rewards | 30 days |
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| 1. Train
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| What are the supporting activities?  | How will this achieve the goal? | What is the achievement deadline? |
| Set up training modules for different sale’s environments | Employees will be ready to tackle any scenario | 60 days |
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| 1. Sales and Marketing requirements are kept
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| What are the supporting activities?  | How will this achieve the goal? | What is the achievement deadline? |
| Keep a checklist | Make sure everything is done correctly | 60 days |
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| 1. Retain existing staff
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| What are the supporting activities?  | How will this achieve the goal? | What is the achievement deadline? |
| Employee can fill out surveys | This will show how employee’s feel and what improvements can be made to keep them happy | 10 days |
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1. **Interview Questions**.Write interview questions for the sales and marketing area. Submit this section in Unit 3. Add more rows if needed.

| **Interview question** | **Rationale for including this question** |
| --- | --- |
| 1. How well do you keep up to date on your target market?
 | Whether the candidate is an expert at selling products and how well they up to date on market trends |
| 1. How would you explain what Atha Corp does to someone who has no idea?
 | How well they know the company they want to work for |
| 1. Tell me about a past marketing project you have worked on. What was the deadline and how many people were on the project
 | Gives an idea of previous work environment  |
| 1. Did you ever come up with any marketing ideas?
 | How well they come up with ideas |
| 1. Do you spend more time calling new clients or keeping a good standing with current clients?
 | Where their focus lies |

1. **Purpose Statement**.Write a purpose statement for the sales and marketing area. Submit this section in Unit 4.

Most of us are aware of the term *purpose statement* but are unsure of what its real meaning is within an organization. It is a statement describing the organization’s purpose, or the reason for its existence. The purpose of an organization reflects a desired position in the marketplace. It should accurately answer to the questions below. The purpose statement is the written summary of those answers. The most effective purpose statements are short, concise, and direct. A good purpose statement is between 2–3 sentences.

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| **Purpose Statement**  |
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| **Who are we?** | **What do we do?** | **For whom do we do this?** | **How do we know when we are getting it done?** |
| Atha Corp thrives at providing excellent service to all our clients while keeping the employees happy  | Atha Corp offers excellent management and services to our clients | Atha Corp provides service to a wide range of diverse clients | Once our client’s needs and wants are fulfilled |
| **Compile the answers to the four questions into a concise 2–3-sentence statement summarizing those questions. This statement is your Purpose Statement.** |
| Atha Corp’s mission is to fulfill our client’s needs. To ensure our client’s needs, we provide excellent and quality services, while keeping our employees happy. |

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1. **Performance Standards**. Identify performance standards for the sales and marketing area. Submit this section in Unit 4. Add more rows if needed.

| **Performance Standards** | **Rationale for including this performance standard** |
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| 1. Meeting deadlines
 | How well they keep up to par |
| 1. Excellence
 | Dedication and whether they go above and beyond |
| 1. Effectiveness
 | How well their methods work |
| 1. Morale
 | If they keep the team upbeat and happy |
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