



ALIGNING SALES  
AND MARKETING  
*for business success*



Sales and marketing should, in theory, be perfectly aligned. Their core objective is the same – increasing revenue – and their activities overlap in many ways. Yet in reality they take different approaches to it, use different languages, and measure success in different ways. The result is that there is often a significant misalignment of these two functions.

There are many reasons why this happens, and in each organisation these can be different, but typically it is a result of three key issues: firstly, a lack of communication and alignment of goals; secondly a lack of insight into each team's interactions with customers; and thirdly disparate and disconnected tools.

The problem is recognised in many organisations, and from time to time there are initiatives to try to bridge the chasm. Unfortunately, very often they are incomplete and so unsuccessful. To be successful, the organisation's leadership needs a clear-eyed view of the issues that divide causes and the opportunities that are lost because of it. They also need a clear strategy to deal with those issues.

In this white paper we describe these pain points, we map out a strategy that, if implemented, will see the theory of sales and marketing alignment become a reality, and we describe the benefits that will result.





# LOST *opportunity*



How do you know if the sales and marketing functions are misaligned at your organisation? In some cases the issue presents itself as complaints from marketers that the sales team doesn't follow up on leads or that they never know what happens to leads they pass to the sales team. In others, we find complaints from salespeople that there aren't enough leads coming through from marketing or that the leads aren't good enough. In most cases it is both sales and marketing who are complaining.

The issue is greater than employee frustration.

A 2015 survey from Gleanster found that of organisations lacking this alignment just **37%** reach revenue goals and a mere **7%** exceed them. This compares to **56%** and **19%** for aligned organisations. According to Sirius Decisions, aligned organisations achieve up to **19%** faster revenue growth, and **15%** higher profitability than other companies.

The impact of a lack of alignment between sales and marketing is significant. So much so that it should encourage organisations where the sales and marketing teams appear to operate harmoniously to probe a little deeper. Are their goals truly aligned? Do they communicate as well and as often as they should? Does each function really know what the other one is doing with customers? How much better could they work together if they used the same tools? Ultimately what financial impact could bringing the two functions into greater alignment have on the organisation?

Most organisations that probe the issue a little deeper conclude that there is room for improvement. The question then becomes: how to make it happen?





## LEAD FROM *the top*



# THE FIRST STEP MUST BE AGREEMENT

*between the leadership of both functions to work more closely together.*

According to a 2016 Forrester survey, 73% of 275 B2B CMOs named their relationships with the Head of Sales as the most critical for success, yet in reality these relationships are often difficult. Each jealously guards what they see as their territory, defending the performance of their teams, and complaining about perceived underperformance of the other department.

This sets the tone for interactions between others in these functions; it is little wonder they become misaligned.

There needs to be a recognition at the very top of these departments that the shared objective is increased revenue. And if this is to happen it will

require a blending of the science and art involved in both sales and marketing, and the valuable contribution of both functions throughout the entire customer journey.

This should be unequivocal and reinforced regularly. If the departmental leaders can take that first step out of their silos, then their teams are far more likely to follow them. That same Forrester survey also found that 71% of B2B CMOs said that having sales experience was valuable or highly valuable to their current role, and many organisations find that temporary or occasional relocation to another department can provide not only vital insight, but also a highly visible statement of intent.





## MAP THE *process*



**Once the example has been set at the top, it is easier for it to be followed throughout the organisation. It is however still a**

## PROCESS THAT MUST BE PLANNED, MANAGED AND ENCOURAGED.

**Frequent and open communication is also key, as it is in any relationship.**

At the outset this should involve a process of planning the sales and marketing pipeline. What happens at each stage and who owns it? How does

the marketing function attract leads, how do they qualify, score and nurture them? At what point do they hand them over to sales? How do you define a sales-ready lead? From there, what are the steps the salespeople take to progress a lead through to sale? How many stages are there within the sales cycle, what happens at each stage and what needs to be completed before a prospect can move to the next stage? What content is required when?

Understanding why sales have qualified out a deal is even more important and valuable than knowing why a deal was won. If the marketing team understands the criteria on which the sales team will qualify out a lead, they can ensure that in future they stop passing over leads like that. That insight will probably also inform their marketing activity – there is no point in them working to attract leads that will be discarded by the sales team later in the process.





# OPEN, CONSTRUCTIVE *communication*



'Mapping out the process' will require a joint approach with both teams agreeing on the core components. Sales and marketing teams will need to work closely together through a series of detailed meetings where they thrash out topics that are often contentious.

**IT IS RARELY AN  
EASY PROCESS, BUT  
IT IS USUALLY A  
WORTHWHILE ONE.**

Not only does the organisation emerge with a more efficient and effective marketing and sales process, but the two functions learn to communicate with each other. This must be continued in a constant iterative process of planning, implementing, learning, and then planning together again.

Typically this takes the form of weekly meetings. Remember that these need to be managed. Ensure all involved listen as well as talk. Encourage participants to voice frustrations and then work together to find solutions. It is not easy to achieve this level of high quality communication – and very often it exposes those members of either team who prefer to complain than find solutions – but it is the cornerstone of alignment.





## A SHARED *destination*



A key aspect of the process is to agree shared goals, performance targets and metrics. Marketing cannot be measured purely on brand perception, and sales cannot be measured purely on leads closed. Both teams need to understand the importance of both short-term revenue growth and long-term brand development, and they need to share key performance indicators on both aspects.

This simple process of pointing the two functions in the same direction, towards shared targets, is instrumental in achieving alignment. It encourages them to work together to achieve them. It helps them recognise and value the contribution each makes to achieving those goals.

From there the next step is agreeing and documenting, in the form of a service level agreement, what each function is expected to deliver to the other. At the heart of this is usually the handover of a lead. Nail down the point of handover – the precise qualities of a sales-ready lead – how it should be handed over, and the timeframe for sales to follow it up.

## FINALLY, PUT IN PLACE A SYSTEM FOR MEASURING THIS PROCESS.

How will you track where leads come from? How do you measure the investment needed to generate that lead? How do you track the lead through the marketing and then sales process to know the final outcome? It is only by tracking and measuring these, and other processes, that you can see conversion rates and return on investment, and so work together to further refine your shared process.



# TANGIBLE BENEFITS *of technology*



At most organisations, the sales and marketing pipeline is complex. It involves many people engaged in numerous activities with many customers in disparate locations and across varying timescales.

Bringing all this data into a single place to give all involved a clear, simple, single view makes it far easier for everyone to stay aligned, and this is where technology such as CRM can be a great enabler.

## A CRM SYSTEM PULLS IN INFORMATION FROM ACROSS THE BUSINESS

**and presents it back to salespeople and marketers in easy-to-understand, real-time dashboards and reports.**

CRM allows salespeople and marketers to easily see the sales pipeline, allocate tasks between departments, and effectively manage marketing and sales campaigns.

It allows management to track the progress of leads through the funnel and to understand which aspects are performing well and which aspects need focus. It helps salespeople and marketers pass leads between each other at precisely the right moment, neither delivering them too early where the sales approach can alienate prospects, or too late, when the critical moment might have passed.

Furthermore, it allows salespeople to share learnings from the time they spend with customers. This can help define the exact customer persona for the product so that the organisation targets its marketing activities more precisely, and is able to deliver ever more relevant content through ever more ideal channels. The marketing process is honed, which in turn makes the sales process more effective, in an ongoing virtuous circle.

And that is not all...





# INTEGRATED CRM & MARKETING *automation for "smarketing"\**



You can take it one step further...

Having one integrated solution that combines both CRM and Marketing Automation and that syncs data both ways, means your Marketing Automation software can use the CRM data in an automated fashion to engage directly with prospects, and then provide data about the lead back to sales to use in closing customers. In a nutshell, by having one integrated solution, marketing and sales are able to build context into the way they market and sell.

This facilitates seamless hand-offs from marketing (attracting, nurturing, and scoring leads) to sales (opportunity management, activities, forecasts, and proposals). It also reduces time spent on daily administrative tasks for both departments, increasing the speed of follow-ups and shortening the sales cycle.

An integrated solution also helps with data accuracy by removing duplicate contacts and standardising contact properties across marketing and CRM. You can get a complete snapshot of the customer/lead history in one place. This allows for more targeted marketing by segments and for more productive sales conversations - the sales person can see a complete picture of the lead: their company, interests, downloads, and interactions with your organisation.

Shared data also facilitates closed loop reporting to see which marketing campaigns and efforts provide the most ROI and make adjustments based on what's working and what's not - driving future marketing investments.

CRM and Marketing Automation underpins sales and marketing alignment and if integrated together, provide you with the tools to really shift the needle, drive "smarketing" and ultimately business growth.





# NO STICKING *plaster*



CRM systems cannot be applied in isolation, as a kind of sticking plaster to an organisation where sales and marketing are not aligned. They require a common language, agreed mutual KPIs, and a commitment to alignment.

Without those elements in place CRM platforms tend to be ineffective. With them in place, a CRM

platform becomes the final element that enables the organisation to get maximum return from its salespeople and marketers. It enables organisations to become customer-centric, and ultimately higher performing and more successful.

Make sales and marketing alignment a priority, invest in CRM technology and reap the rewards!

