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# MINUTE MARKETER

## Sales-Marketing Alignment

12 tactics for helping Sales and  
Marketing work together effectively

# 30-Minute Marketer

## Sales-Marketing Alignment: 12 tactics for helping Sales and Marketing work together effectively

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**Sales-Marketing Alignment: 12 tactics for helping Sales and Marketing work together effectively**

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# TACTICS YOU CAN LEARN OVER LUNCH

Welcome to *30-Minute Marketer* – a resource from MarketingSherpa featuring bite-sized tips for busy marketers.

In this report, we show you how to establish a positive and productive working relationship between your Sales and Marketing teams. Even skilled, disciplined marketing and sales teams can under-produce when working in silos. If each team is operating independently, without communicating or collaborating with the other, what may seem effective in a vacuum will ultimately underperform. It's possible these teams may even be hindering the other's efforts without realizing it.

For example, 61% of B2B marketers admit to sending “leads” directly to Sales without qualification, according to the MarketingSherpa [2012 B2B Marketing Benchmark Report](#). If leads aren't qualified, can they truly be considered leads? Or, are they just names, email addresses and phone numbers that waste the sales reps' time?

By making Sales-Marketing alignment a priority, you will get the maximum benefit from everyone's hard work—while at the same time fostering a greater sense of unity and cooperation among the teams.

In this report, we'll show you:

- Why you can't afford to ignore the problem
- How Marketing can better understand Sales
- Ways that content and social media can help
- The importance of good communication

We know you're in a hurry, so let's get started. We're eager to share these tips on how you can get your sales and marketing teams to work in harmony.

Bobbi Dempsey  
Editor, *30-Minute Marketer*

## **About *30-Minute Marketer***

MarketingSherpa's *30-Minute Marketer* is designed with you, the busy marketer, in mind. We provide quick, simple tips that you can put into action right away.

For each *30-Minute Marketer*, we scour the vast MECLABS library of marketing research, from MarketingSherpa case studies and benchmark reports, to MarketingExperiments optimization tests and analysis. We highlight tips to help improve your marketing performance right now ... or, at least, by the time you're done with lunch.

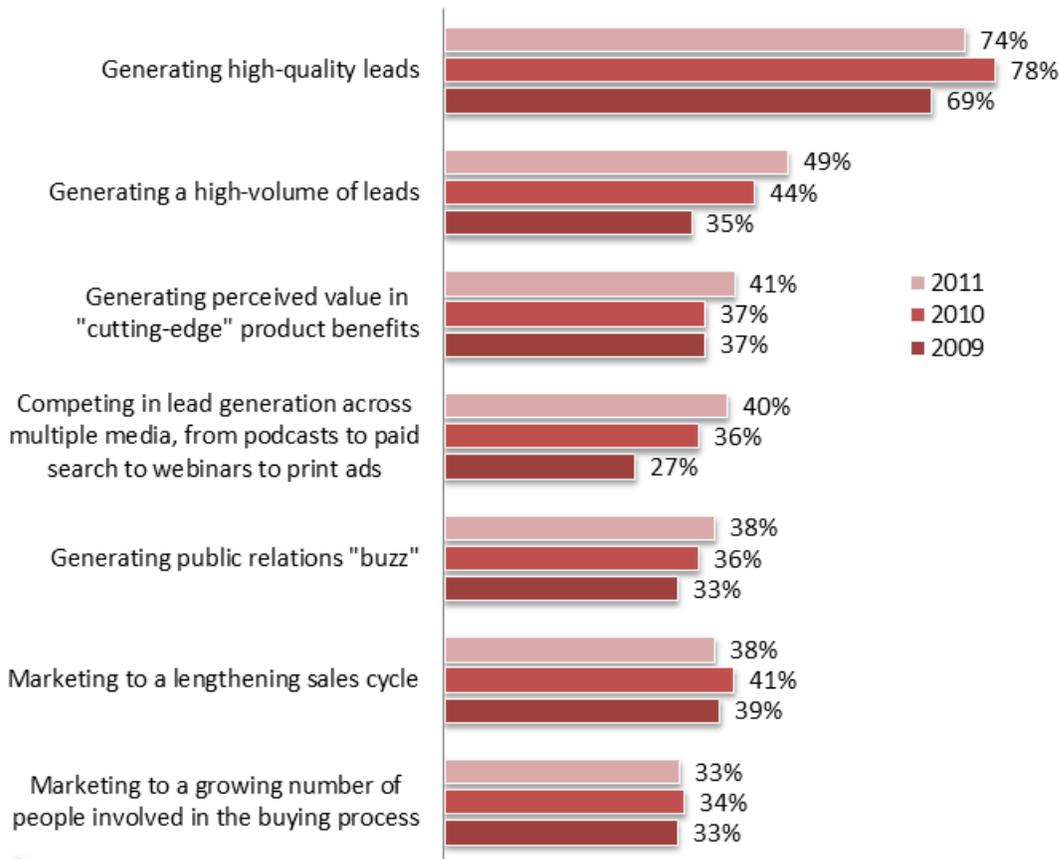
## Tactic #1: Recognize why alignment is so important

Marketing and Sales often seem to operate as individual entities, each enjoying – and perhaps stubbornly guarding – departmental independence. But, recognizing the benefits of working together as partners will allow members of both teams to work more effectively, and achieve better results.

It's not just about the "feel good" benefits of teamwork, as alignment can have a positive impact on the bottom line. When these departments work in harmony, the entire complex sales funnel becomes a much more manageable process, from lead generation to closed deal.

As the chart below from the MarketingSherpa [2012 B2B Marketing Benchmark Report](#) shows, marketers say their top challenge is finding high-quality leads. But, it would be difficult for them to identify a high-quality lead if they aren't aligned with Sales.

**Chart: B2B marketing challenges growing in pertinence**



Source: ©2011 MarketingSherpa B2B Marketing Benchmark Survey  
Methodology: Fielded June 2011, N=1,745

In the webinar, "[2012 B2B Marketing Benchmark Report Reveals How Marketers Can Transform Mounting Pressure, Challenges into Revenue](#)," Brian Carroll, Executive Director of Revenue Optimization, MECLABS, explains the critical importance of bringing Sales and Marketing together to ensure the funnel operates optimally. He says, "The best football teams are the ones that do the best job of huddling between plays. The frequency of your funnel will impact your ROI."

In the MarketingSherpa article, "[Sales-Marketing Alignment: 8 tactics from a marketer who has worn both hats](#)," Kelly Harman shared insight based on her unique background. Harman, Vice President of Marketing, Carousel Industries, originally came from a sales background, and entered the marketing world understanding the issues and pain points of both company divisions.

She added, "Marketing doesn't just start with creating leads and having trade shows and doing direct marketing. Your job is to make the salespeople as successful as possible. And, to do that, you have to figure out ways to shorten the sales cycle whenever you can, to generate more qualified leads, to nurture the ones that aren't, and then give the salespeople tools they need to do their job."

## **Tactic #2: Get everyone in the same room**

The MarketingSherpa article, "[Getting Sales and Marketing into the Same Room: Marketing automation implementation spurs successful integration process](#)," shared the story of Compendium, a company that creates software that helps marketers publish social content to blogs, landing pages, Facebook, Twitter and LinkedIn for the purpose of acquiring new customers.

Isaac Pellerin, Marketing Design Manager, Compendium, and Ken Moorhead, Sales Operations Manager, Compendium, realized there was a disconnect between their two teams. Sales didn't trust that Marketing was providing sales-ready leads, and Marketing was wondering why all the leads they were generating weren't being converted.

Compendium's Marketing and Sales teams faced two disconnects:

- Each side had a different idea of what defined a qualified contact.
- Each department wasn't using the same data sources or doing analysis in the same way.

And, to compound the problem, each side wasn't even aware of these inconsistencies. For the qualified lead issue, Marketing and Sales had set different definitions of who their customers were. Marketing was targeting, and qualifying leads based upon one definition, while Sales was following up on those leads based upon its own definition.

The data and analysis problem exposed an ever-widening gulf between the teams. Sales was looking at revenue analysis, leading Moorhead to believe he was seeing inflated lead source figures. The problem was that Sales was interested in quarterly numbers, while Marketing was looking at all-time opportunities generated.

This discrepancy created a great deal of miscommunication. Pellerin admits Marketing could be faulted for being “loose” with what defined a success. He says, “When you don’t have a clear definition of what you’re measuring, then both sides will choose to measure it through what’s important to them.”

In an effort to fix these issues both teams would meet to discuss the problems. But, these meetings did not provide usable actions or results. In fact, the sales manager acknowledges that each team would go back to their respective offices to complain about the other.

What changed? The company began to look into marketing automation, a process that required Pellerin and Moorhead to do course work on the system together. The presentation covered the analysis of the entire customer lifecycle, from prospect to close. They had recently undergone a process of trying to manually solve the problem together, and mutually realized that marketing automation could help bridge the gap between the two sides.

After this realization, the two teams began collaborating and defining their processes, and where they intersected. They also determined and defined the steps between when a lead is generated to actual conversion. Working together, Marketing and Sales defined Marketing-ready leads, as well as Sales-ready leads. Marketing automation helped integrate the departments by simplifying the process of understanding the customer lifecycle.

### **Tactic #3: Treat Sales as your most important potential customers**

The MarketingSherpa article, [“Bridging the Gap: 5 Objectives for Improving Relations between Sales and Marketing \(Part 1\)”](#), says Marketing should research the Sales team as carefully and fully as they would any other critical prospect base. Understand what makes them tick, what their pain points are, and what would thrill them beyond measure.

Some tips to help you understand and assist the Sales team:

**Take sales training.** Attend your organization’s sales training as if you were a new sales hire instead of a current Marketing team member. If the time commitment is too overwhelming, attend a few sessions in person and grab the workbook, handouts or other materials to study on your own time. Ask your staff to attend sales training as well.

**Monitor meetings.** Try to attend regular sales meetings as a mostly silent monitor. Your goal is not to interject marketing commentary or requirements, but rather to sit, listen and learn.

**Talk to them in their language.** Sales and Marketing often use similar words with different meanings, which can become frustrating for both sides. In this case, Marketing must concede. In the world of office politics, Sales is the top focus, so you will need to use their “language.” If they use the term “hot prospect” and you use the term “lead” to mean the same thing, defer to their definition. Nothing hampers Marketing’s credibility faster than incorrectly using sales terminology. If this terminology is not formally documented, set up a meeting to obtain definitions, take notes, and then distribute the resulting “sales dictionary” to all involved.

**Discover their work rhythms.** Sales reps' days, weeks, months and quarters are made up of activity rhythms. You need to know their primary deadlines, when they tend to make prospect phone calls, when they are traveling, when they check email, when they call in, when they begin relaxing before the weekend, and when they should never be disturbed. To Sales reps, time is money. Demonstrate that you respect their time. If you know when their down times are, you can schedule in your calls, emails, internal webinars, and information requests around them. Don't forget to account for time zone differences.

**Determine their (true) pipeline requirements.** Many reps will say, "Give me all the leads you have!" In reality, if a rep had a choice between 10 incredibly qualified leads and 100 undifferentiated leads, he or she would most likely ask for the 10 stronger ones. Everyone has a limit to the number of accounts they can work each day, each week, each month. If you give them too many, they'll simply choose the strongest and ignore the rest. You should never keep a good lead from a rep; they must have a feeling of control over and access to the pipeline. However, you don't want to overwhelm a rep with too many leads, either.

## **Tactic #4: Synchronize the view of data**

As part of this process of alignment at Compendium (see Tactic #1), Isaac Pellerin and Ken Moorhead coordinated to determine exactly which metrics are needed to benchmark success. This is a dramatic change because previously, each team had its own definition of a qualified lead, its own set of numbers that were tracked, and its own analysis methods, even when the same data was analyzed.

Now, both teams work with the same set of numbers and processes. Revenue is a focus for both Marketing and Sales, and the bottom line figure helps both departments prove their worth to the company.

Pellerin, the Marketing Manager, says the number he studies most closely is opportunity conversions for each campaign. The system allows him to quickly see the conversion rates, and how many leads are creating meetings for the sales team. With these figures, total number of leads generated becomes less important, and generating a high percentage of qualified leads with the campaign becomes the goal.

Moorhead, the Sales Operations Manager, is interested in opportunity conversion, but also sees demographically qualified prospects as important. Both teams are interested in continually refining the definitions for Marketing-qualified leads and Sales-qualified leads.

Moorhead uses the company's marketing automation system to visualize the sales qualification and sales pipeline simultaneously. This way he can look at the overall workload and, if it is high, he can revert some prospects back to marketing-qualified and keep those leads active with an email campaign.

And, if the forecast looks light, he can work with Marketing to start generating leads out of the current database. Combining the sales forecasts with the marketing automation system, he can help Sales meet its number each quarter while accurately measuring the workload for each sales rep.

## **Tactic #5: Send marketing team members on sales calls**

After becoming the VP of marketing at Carousel, Kelly Harman began having her staff accompany reps on sales calls. This provides a number of insights for the marketing team:

- How Sales is using the marketing tools
- How Sales is positioning the company
- Whether sales reps are actually using Marketing's tools and branding, or have created their own
- Help in understanding the problems faced by customers

"I am always surprised in the number of people who are in marketing but have never actually been out on a sales call," Harman said. She added that a marketer on a sales call might discover the sales rep does not use the "42-page PowerPoint presentation that Marketing painstakingly created for them."

That marketer could also hear the sales rep asking questions about the customer's pain points, or other issues that never previously occurred to Marketing. Another learning aspect might be seeing what marketing tools the sales rep uses, and how those tools are used. Essentially, Marketing can learn which tools sales reps like best and which ones they ignore.

Possibly the most important benefit of these "field trips" is allowing Marketing to gain credibility with Sales. "You are saying, 'Look, I am willing to walk your walk, let me just learn from you,' and [sales reps] appreciate that," explained Harman.

## **Tactic #6: Provide internal content in different formats**

In Carousel's case, the major alternative formats were video and podcasts. "We have salespeople of all different ages and different generations, and they all learn and absorb information differently," said Harman. Along with providing new marketing material through documents, and making announcements via email, the marketing team began creating videos featuring interviews with subject matter experts, to let the sales team know what was important about the message.

Harman explained when the company would roll out a new product or service, she would interview the person in charge of the offering, and ask them various sales-oriented questions:

- Who is the target audience?
- What question should I ask the prospect?
- What pain points should I look for?

These videos are placed on "The Sales Insider" internal blog. There, the Sales team can choose to read about the new product or service in the marketing document, or just watch the video to receive the same message and information. Podcasts are also produced so the sales team can just download the audio for the marketing announcement and new product or service information.

## **Tactic #7: Get Sales involved with social media**

Carousel's blog is active with three to five posts each week. Harman said every salesperson subscribes to the blog to keep abreast of updates and the content the marketing team is producing. The sales team is also instructed to send links to blog posts instead of sending marketing content to prospects, in hopes they will begin engaging with the website and subscribe to the blog for more information.

Harman also offered social media training for the sales team on how to do prospecting and lead generation on LinkedIn, as well as basics courses on the differences between blogs, wikis, websites and social media platforms. She said, "I thought if three people show up, it will be great. I think I had 45 people on that call."

## **Tactic #8: Make marketing programs transparent to the entire company**

The Marketing team at Carousel also created an "insider" venue on the company's internal computer network to report on the metrics of every marketing campaign, including events, trade shows and webinars. These metrics show the entire company how many people register, how many actually attended, and how many opportunities were tagged through each particular lead generation program.

"Anyone in the company can go to [the "insider venue"] and see all the programs that Marketing is doing right now, and here are the results," said Harman. "I think it gives my team a lot of accountability ... It's not just your marketing team seeing the results. Everyone in the company does."

She added this transparency has made Marketing more engaged with the entire company. "I will get calls from people in different departments with recommendations," explained Harman. "Somebody in the customer service department, or somebody in the warehouse, will say, 'You know, [I was] on our website and I saw [this issue]. What do you think if we did this instead?'"

The result of being transparent is everyone in the company feels like they are part of the marketing effort, said Harman.

## **Tactic #9: Define handoff process from Marketing to Sales**

In the MarketingSherpa article, "[Fostering Sales-Marketing Alignment: A 5-Step Lead Management Process](#)," Brian Carroll of MECLABS says the handoff between Marketing and Sales is crucial, and yet remains a common misstep in the process of moving leads through the funnel.

In order to make the lead transition as smooth as possible, have a documented process, agreed upon by both Sales and Marketing. According to Carroll, the following process should be clearly defined and followed to ensure the handoff is effective:

### **1. Be sure the lead is "sales-ready"**

- Leads must clearly fit the ULD (Universal Lead Definition, as agreed upon by both Sales and Marketing)

- Leads must express a desire to speak with a sales rep
- Leads must be qualified, with supporting information

**2. Be sure to have a clear handoff process**

- Don't drop the baton—ensure that lead ownership is clear and agreed upon

**3. Establish a quick, efficient timetable for turnaround**

Ultimately, an established process not only increases efficiency, but also shows if your leads are actually helping your sales team convert and measures the contribution you make to the pipeline.

## **Tactic #10: Encourage frequent communication**

Carroll said effective sales and marketing organizations are ones that communicate well. Regular meetings should be held to gauge progress and success. In these “huddles,” both teams can collaborate to review results, fix procedural errors and refine priorities moving forward.

These meetings will provide your team with honest, actionable feedback from Sales, helping you determine:

- If your lead information is accurate and helpful
- If your leads are in the target market
- If your leads are “sales-ready” (i.e., ready for sales rep involvement)

## **Tactic #11: Implement a closed-loop process**

In the MarketingSherpa article, [“Lead Generation: How ignoring 16,896 companies helped improve Sales-Marketing alignment,”](#) Karen Hayward, EVP and CMO at CenterBeam, a company that delivers technology infrastructure support for mid-sized businesses, said an important aspect of getting Sales and Marketing on the same page is making sure a closed-loop process is in place.

“We are starting to put more of our effort into making sure that we are getting as much feedback from the sales force as we possibly can. And where we might improve either our lead quality or our focus on how we articulate the value proposition,” Hayward said.

The benefit of the tracking and feedback process is when a lead would “fall through the cracks” at some point in the pipeline – typically during the handoff from Marketing to Sales – the information provided by the closed-loop system allowed CenterBeam to identify those “missing in action” leads.

When Sales alerted Marketing of a lead that had been passed on to them, despite needing more information to

reach “qualified” status, the lead in question was recycled into a lead nurturing program for what Hayward described as, “reheating.” She said, “These closed-loop activities made sure the full value of mid- and long-term leads was realized.”

## **Tactic #12: Invest the time and man hours to keep things in sync**

Once the two teams have reached a state of alignment, you must be committed to maintaining that state – which requires time and attention. In some companies, it’s literally a full-time job. In the B2B Lead Roundtable Blog post, [“How ECI Telecom Discovered the Surefire Sign that Sales and Marketing are Aligned,”](#) Michelle Mogelson Levy, Associate Vice President of Marketing Programs, ECI Telecom, described how the company used a marketing automation program to help both teams work together more efficiently.

After some adjustments, the teams figured out how to best work together. To keep things on the right track, the marketing team assigned a person to focus solely on alignment. The job of the Centralized Alignment Leader was to maintain the lines of communication that were now completely open between the departments.

### **Useful Links and Resources:**

[Marketing Sherpa: Sales-Marketing Alignment: What B2B Marketers Can Learn from a One-Person Team](#)

[MarketingSherpa Blog: B2B Marketing: Combining Sales and Marketing Knowledge to Improve Lead Qualification](#)

[MarketingSherpa Blog: B2B Lead Generation: Why Teleprospecting is a Bridge Between Sales and Marketing](#)

[MarketingSherpa: The Secret Key to Marketing and Sales Working Together](#)

[B2B Lead Roundtable Blog: Lead Generation: How 54% of Marketers Starve Sales of Opportunity](#)

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MarketingSherpa is a primary research facility, wholly-owned by MECLABS, dedicated to determining **what works in marketing** via exclusive case studies, surveys, and results data analysis. Then we publish what we learn so our community of marketers and weekly readers can improve their results and train their teams.

Praised by *The Economist*, Harvard Business School's Working Knowledge Site and Entrepreneur.com, MarketingSherpa is distinguished by offering **practical, results-based marketing** information researched and written by a staff of in-house reporters.

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## About MECLABS

MECLABS is a science lab that uses real-world research and training to **help business leaders get better use out of sales and marketing technology and resources**, including Internet marketing, website optimization, and lead management. We have been involved in direct research partnerships with companies throughout Europe and North America since 2001.

MECLABS deploys a rigorous methodology to conduct research. This research is compiled from:

- More than **10 years** of research partnership with our clients
- **1,300** experiments
- Over **1 billion** emails
- **10,000** landing pages tested
- **5 million** telephone calls
- **500,000** decision maker conversations

MECLABS has consulted with companies like Cisco, Johnson & Johnson, *The New York Times*, 1-800-Flowers, and NetSuite to optimize sales and marketing processes and achieve triple-digit ROI gains.

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