

# Introduction to Integrated Marketing: **SALES AND MARKETING ALIGNMENT**

A company's sales and marketing teams often have a complex, sometimes contentious, relationship. On one hand, both sides realize that they need to work together in order to meet their demand and revenue goals. On the other hand, many sales and marketing teams barely speak to one another – never mind working together.

That's why sales and marketing alignment is such a hot topic today. Alignment involves many things: Shared goals, common milestones and metrics, well-oiled business processes, and smart technology investments.

But first and foremost, alignment is about one thing: communication. If sales and marketing can't learn how to work together as a single team, speak the same language, and exchange information freely, then all the technology in the world won't make a difference.

The benefits of alignment are clear: According to a 2014 study by Math Marketing, organizations that are aligned have a 67% higher probability that marketing-generated leads will close. Yet, according to Bizible, over 30% of marketers feel that they are not aligned with their sales team.

**This guide will help your sales and marketing teams achieve true alignment – and all the benefits that come with it.** We'll walk you through seven foundational steps towards this goal, including evaluating your current sales and marketing processes; establishing common metrics, buyer profiles, and objectives; and more.



## STEP 1:

# Get Your Buyer Profiles On The Same Page

Prospect and buyer profiles can be a tricky business. Chances are, your sales and marketing teams each have an established view of their “ideal” prospect and ideal customer profile, and a lot of their daily activities reflect that vision.

Here’s the problem: Marketing and sales teams often use radically different prospect and company profiles – and they may not even know it.

The first step towards solving this problem is to get your sales and marketing leaders together to compare their prospect profiles, focusing on where they overlap and where they don’t. At the same time, you should compare both sets of current profiles against what you know – based on intelligence gathered from your marketing automation, CRM and sales systems – about your best (and worst) customers. What traits really define a long-term or exceptionally profitable relationship? Which ones could be warning that some prospects might consistently present challenges?

Armed with this knowledge, you can proceed to build a single, mutually acceptable set of prospect profiles. In the process, you’ll build an important bridge between your sales and marketing teams that will facilitate better communication and cooperation, and go a long way to resolving entrenched conflict. This is especially important if you’re planning on introducing an **account-based marketing** strategy, which hinges on both sales and marketing teams knowing exactly who your ideal customer is.

**B2B organizations with tightly aligned sales and marketing operations achieved 24% faster three year revenue growth, and 27% faster three-year profit growth.**

*(Sirius Decisions)*

Want to learn more about developing buyer personas? **Check out our workbook “Right Person, Right Message, Right Time” to get started!**

**Persona 1**



Senior Director of Demand Generation

**Persona 2**



Manager of Operations

**Persona 3**



Chief Marketing Officer

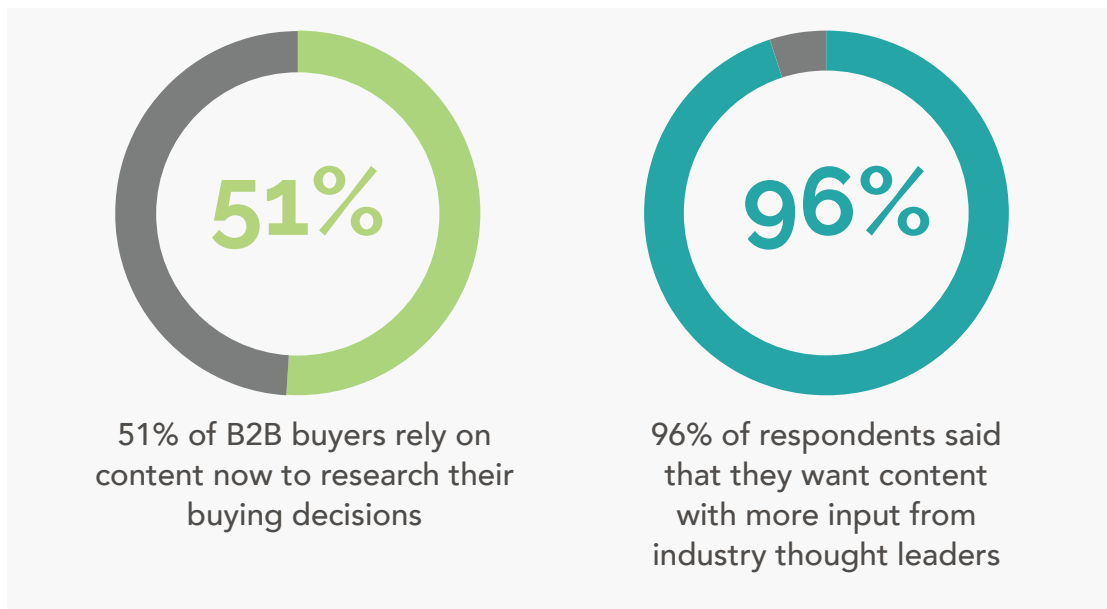
## STEP 2:

# Develop An Integrated Messaging Strategy

Content is another area where your sales and marketing teams may not be on the same page (no pun intended!). Different groups may rely upon different – and often mutually exclusive – sets of content assets. Some of these assets may be quite valuable, but others might be outdated and in need of a refresh.

A comprehensive content audit – figuring out what you’ve got, how it’s used, and where to find it – can help to correct this problem. In the process, it’s likely that you’ll discover “lost” assets that could be valuable to other parts of your sales and marketing organization. It’s also likely that you’ll discover gaps where your existing content isn’t suitable for certain nurturing campaigns, buying stages, or prospect profiles.

Also take time to review current best practices for creating and sharing content. According to the 2015 DemandGen Report “Content Preferences Survey,” for example, “51% of B2B buyers rely on content now to research their buying decisions, and they want shorter, interactive content that educates rather than sells. Additionally, 96% of respondents said that they want content with more input from industry thought leaders.”



**That should be a powerful incentive to make sure that your sales and marketing content strategies are aligned and integrated.**

## STEP 3:

# Agree On Common Metrics And Definitions

Many executives are surprised to discover that their sales and marketing teams answer these questions in very different ways. As a result, neither side speaks the same language, even when dealing with critical concepts like “sales ready” leads (see sidebar).

In some cases, solving this problem is simply a matter of agreeing upon a set of shared definitions. In other cases, prospect data from a marketing automation system can help you identify the most important metrics for tracking and analyzing your company’s sales and marketing performance.

## Defining The “Sales Ready” Lead

The process of handing off a lead from marketing to sales is critical to both sides. It’s the point where the marketing team proves its value, and where the sales team gets the raw material for closed deals.

So why do so many companies stumble over how they define a sales ready lead? That’s usually the underlying problem when marketing complains that its leads vanish into a black hole – or when sales reps complain that the leads they get from marketing are a waste of their time.

Solving this problem is one of the most important things you’ll accomplish with a successful sales and marketing alignment initiative. Look at your metrics and pipeline data: What criteria do the best job of defining qualified leads? Then document your criteria in a formal definition, get sign-off on the results – and follow up with a solid Service Level Agreement.

**Organizations with tightly aligned sales and marketing functions enjoyed 36% higher customer retention rates and 38% higher sales win rates.**

*(MarketingProfs)*

**Ask your sales and marketing teams – separately – how they answer the following questions:**



- How do they define a qualified lead?
- What rules do they follow for discarding or disqualifying leads?
- What demographic or behavioral traits do they associate with qualified leads?
- How do they define the various stages for managing leads?

## STEP 4:

### Establish SLAs

The Service Level Agreement (SLA) isn't just for technology providers. In fact, SLAs are an important way to define the relationship between your sales and marketing organizations, and to hold both sides accountable for their commitments.

The idea is really pretty simple: Begin with a set of agreed-upon performance metrics, such as those identified in Step 3. **Then set a series of targets such as:**

The **number** of sales-ready leads to be delivered by the marketing team

The **minimum** amount of information to be collected before a qualified lead is passed to sales

The **maximum** time for a sales rep to follow up on a qualified lead

A **timeframe** for providing feedback to marketing on lead quality, especially regarding rejected leads

Create separate SLAs for your sales and marketing teams, with each group making specific commitments to agreed-upon monthly or quarterly goals. The SLA you create will reflect your organization's unique needs. Just remember that an SLA should be clear and simple; the goal is to encourage collaboration and maintain accountability, not to add a layer of bureaucracy to your business.

## STEP 5:

### Create A Clear Process For Handing Off Leads

When you establish sales and marketing SLAs, you'll also want to establish a process for handing off leads to sales, and also for sales to establish a closed-loop reporting relationship with marketing. Focus on questions such as:

- **Who receives leads from marketing?** Will there be a single point of contact, or will leads go directly to individual sales reps?
- **How will the sales team report** rejected leads back to marketing?
- **Which team members** will serve as points of contact for questions or concerns about the lead process?

This is a simple step, but it's also very important to the alignment process.

**Companies with "dynamic, adaptable sales and marketing processes" reported an average of 10% more sales people on-quota compared to other companies.**

*(CSO Insights)*

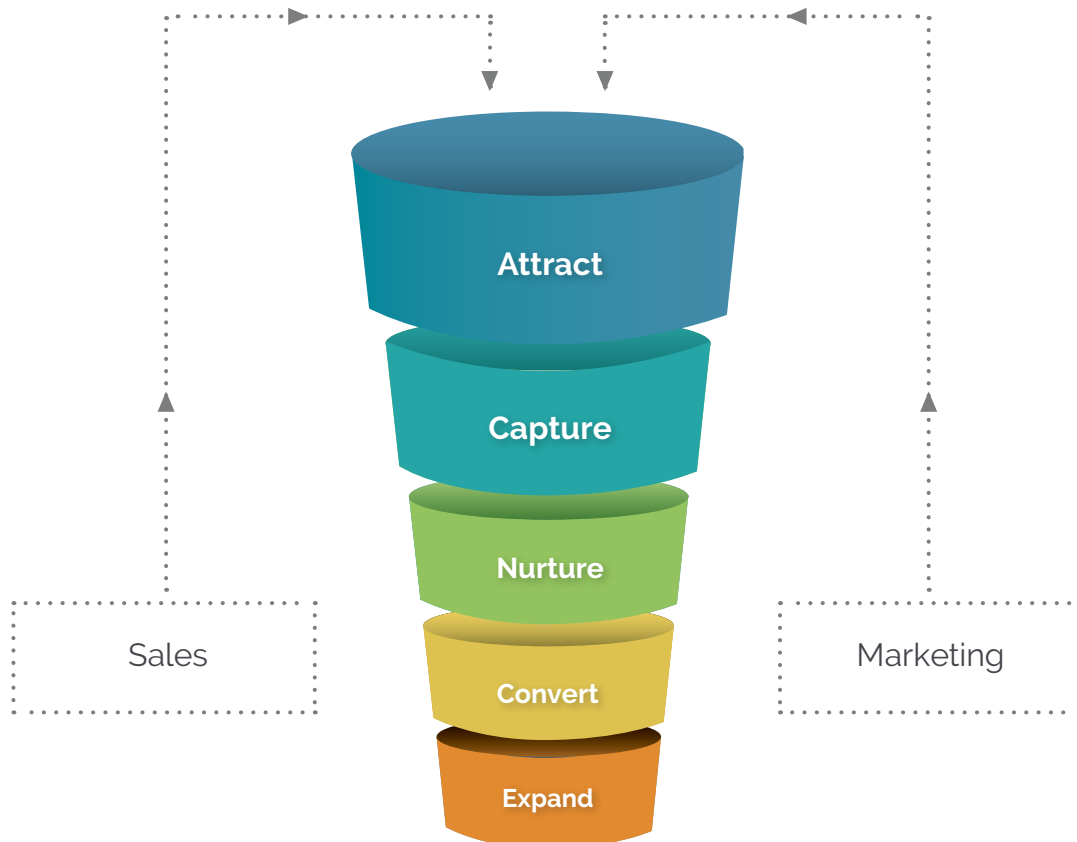
## STEP 6:

# Create a Shared Pipeline

There's a big issue here that we haven't yet tackled: Many sales and marketing organizations treat their pipelines as separate processes. Leads get passed from marketing, and sales pursues those leads, but neither side really has much visibility into how the other side gets things done.

Many of the steps that we described above – common definitions, shared metrics, SLAs – are far more useful when your company treats its sales and marketing pipeline as a single, continuous process. Your sales and marketing teams will still have distinct responsibilities, from prospecting and qualifying at the top of the funnel to closing and maintaining relationships at the bottom. With a single pipeline, however, they'll also understand how each stage in the process works – and why each is important to the business.

Marketing automation technology can help you accomplish this goal, by giving your sales and marketing teams greater visibility into how prospects and leads move through the pipeline.



## STEP 7:

# Follow Up, Review and Refine Your Efforts

Alignment is a lifetime process for any organization. You'll need to follow up on initiatives, track progress, create accountability, and ensure continuous improvement. With an emphasis on shared performance metrics and SLAs, your sales and marketing teams will have plenty of feedback on their efforts – and a lot of motivation to build upon their progress.

Start the review process by analyzing your teams' performances against their SLAs – including average lead follow-up times and the number of qualified leads passed from marketing to sales. You should also review conversion rates at key stages in your pipeline, since these are an excellent way to gauge the effectiveness of an alignment initiative. Finally, a regular analysis of major customer wins and losses can indicate where to concentrate your future sales and marketing alignment efforts.

**With an emphasis on shared performance metrics and SLAs, your sales and marketing teams will have plenty of feedback on their efforts – and a lot of motivation to build upon their progress.**

*Learn how to go beyond just sales and marketing alignment and include customer success to build a winning Team Trifecta. Imagine what is possible with an approach that yields comprehensive results across every stage of the customer lifecycle.*



## About Act-On Software

Act-On Software is a marketing automation company delivering innovation that empowers marketers to do the best work of their careers. Act-On is the only integrated workspace to address the needs of the customer experience, from brand awareness and demand generation, to retention and loyalty. With Act-On, marketers can drive better business outcomes and see higher customer lifetime value. The Act-On platform provides marketers with power they can actually use, without the need for a dedicated IT resource.

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