Sales & Marketing alignment made easy

A five-step guide to getting everyone on to the same page

Intro

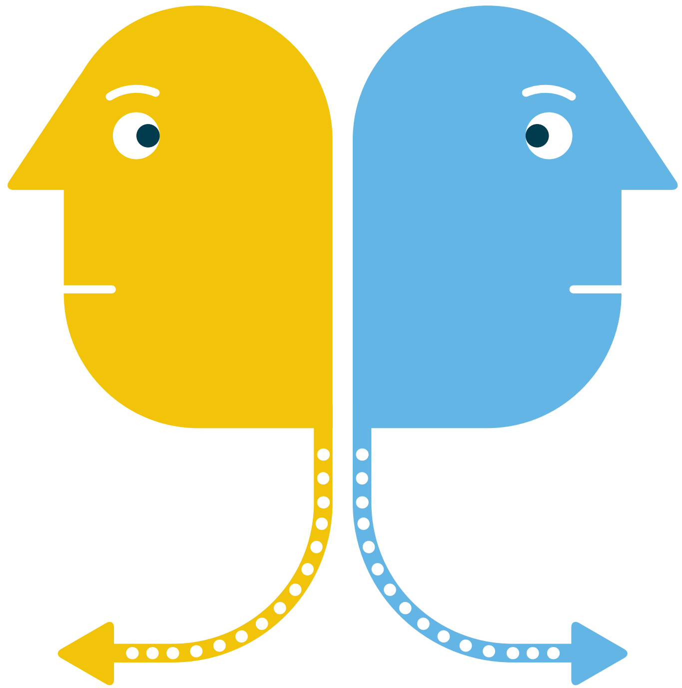
Sales & Marketing alignment: It’s actually not that hard

Sales and marketing have been at loggerheads for so long that their unresolved tension has spawned an entire industry.

Look up ‘sales and marketing alignment’ on Google and you’ll be deluged with suggestions for consultants, agencies, software platforms, blogs, webinars and forums – all trying to get the two functions working nicely together in the name of converting leads into customers.

But does it really have to be so hard? We don’t think so. As long as you do a few things right, the process of easing buyers along the journey from unknown to lead to prospect to opportunity to sale should be a breeze.

This ebook is about those few things. Five of them, to be exact. And they’re things that you can start doing right away, the minute you finish reading this. Ready? Let’s begin.



1

Agree on what the ideal prospect looks like

When you've got a number to make, you don't want to waste time marketing and selling to the wrong people. This exercise will get you all on the same page when it comes to deciding what kind of buyer you want to be spending your time and effort on.

Note: It does involve your sales and marketing teams getting into the same room. (We find that biscuits help.) Once you're there, here are some things to agree on around the whiteboard:

1. **What kind of person is our ideal buyer?**

Including things like their job title, their responsibilities, their age, their fears, their aspirations and their outlook on life.

2. **What kind of organisation are they working in?**

Large or small? Any particular industry sectors? Domestic or multi-national?

3. **What kind of situation are they or their organisation in?**

These are 'trigger scenarios' that might prompt them to evaluate and buy a new product or service. E.g. a new competitor has entered the market, they've appointed a new senior executive, they want to expand into new markets or introduce a new offering...

Once you're agreed on the ideal prospect, Marketing can go and identify which of the leads currently in the system best map to that description, conduct research to identify where to find more of them, and decide on the kind of approaches and content that will spur the not-yet-leads to start considering a purchase.

Define when a lead is really sales-ready

This is the root of the contention between Marketing and Sales. Sales want more leads to make their quota, so in desperation Marketing throws them everything they've got. But most of them are people who randomly downloaded one white paper, or attended an event once. They aren't in any way sales-ready – so passing them over to Sales is pointless.

"Sales reps admit to never following through on 70% of the leads."

2 DEFINE WHEN A LEAD IS REALLY SALES-READY

In this session you'll agree on what a sales-ready lead actually looks like. That means tracing them through every stage of the funnel – from the point at which they become dimly aware of your organisation to the point at which they're pretty interested in buying something. Things you'll agree on in this session include:

1. What is the buyer doing or thinking in each stage of the sales/marketing funnel, and what activity or behaviour shows that they've moved to the next stage?
2. What are the aggregate behaviours that indicate the prospect is ready to consider buying something?
3. How will the leads that meet those criteria be handed over to Sales?
4. What is the process for handing them back to Marketing if they turn out to be not ready to buy yet?

This will all be a lot easier if you're using a marketing automation system that lets you score leads based on their profile and behaviour, track them as they move through the funnel, and enable a smooth handover to sales.

Don't have marketing automation yet?
Check out Salesforce Pardot.

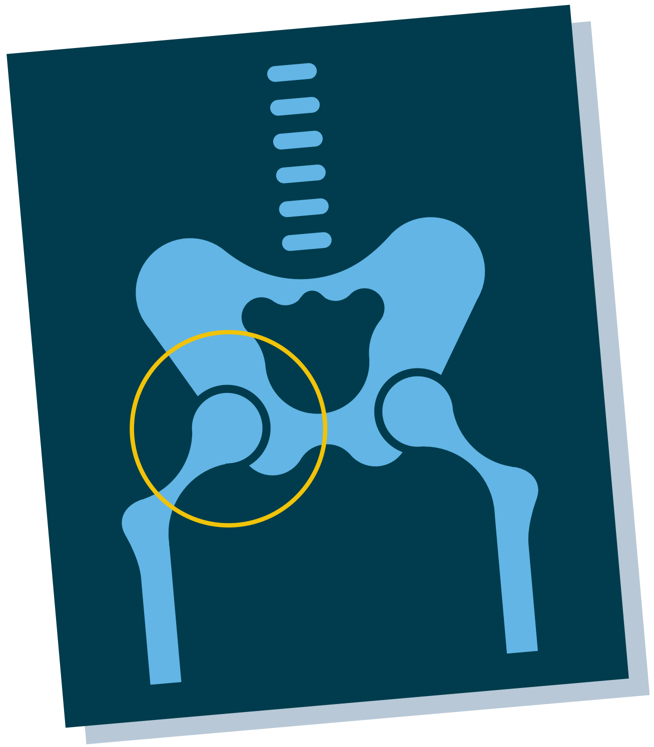
3

Link Your Marketing Automation System to Your CRM System

Like the hip bone and the thigh bone, your marketing automation and your CRM need to be connected. You can't align the two functions unless you also align the systems that support them. Without that connection, your demand generation process just won't stand up.

When you connect your marketing automation to your CRM system, you can start to do all sorts of really useful things:

1. You can track leads all the way through the funnel (so Sales can see where they came from)
2. You have a single source of truth about what each lead has done up to this point (so there's no argument about 'whose' lead it is)
3. You can link opportunities and revenues back to the marketing activities that generated them (so Marketing can demonstrate their contribution to top line revenue)
4. Sales can have access to critical background information about the lead – like what they've read, watched and downloaded, and even what they've shared on social media (so that initial conversation doesn't need to be so stilted)
5. You can easily put a lead back into the marketing automation system for nurturing if they don't convert to sales right away



And most importantly...

Your buyer enjoys a pleasant, consistent and well-informed experience every time they deal with your organisation.

4

Track the metrics that matter

For sales and marketing to be properly aligned, both teams need to be able to check that the beautiful new relationship is working. And that means being able to track essential indicators in a consistent and definitive way – and agree on a solution if things start to go awry.

What kind of things do Sales and Marketing need to track? It'll vary from organisation to organisation, depending on factors like your sales model (transaction vs. solution selling, for example) and the length of your sales cycle. But here are a few things it's a good idea to track:

1. % of marketing qualified leads (MQL) that become sales-accepted leads. If there's a big discrepancy here, it's a sign you need to go back to points #1 and #2 above
2. MQL to opportunity ratio – so Marketing can demonstrate its contribution to the pipeline
3. MQL to revenue ratio – so Marketing can demonstrate its contribution to topline Sales
4. # of leads that are recycled back into marketing automation – so you can start to refine your view of what constitutes a sales-ready lead
5. Length of the buying cycle – so you can work together on ways to reduce it
6. What type of campaign generated the best leads – so you know where to spend your budget
7. What type of content moved leads through the funnel – so you can make more of it
8. Where are prospects getting stuck in the funnel – so you can come up with a way to unstick them

Tracking all of these effectively means everyone having access to the same data – and the same views of that data. This is where a dashboard-based system, built around your joint KPIs, really comes into its own. For more on that, read Nine Principles of a Killer Dashboard.

5

Keep doing it

The market landscape never stands still – and so neither should your marketing and sales processes. The steps outlined above aren’t one-off exercises; they’re the basis for an ongoing relationship in which each one is regularly revisited to ensure it’s still working – and to decide on a way to fix it if it isn’t.

Conclusion

Don't make Marketing and Sales alignment harder than it has to be. Start with the five exercises outlined in this ebook, and you've already done the bulk of the work in aligning the people, the processes and the technology that together make up your demand generation cycle.

People +

Process +

Technology

Next steps: Get a room!

Know a sales or marketing colleague who might appreciate this ebook?

Email it to a colleague or share it on LinkedIn, Twitter or Facebook.

You might even want to go ahead and book a (meeting) room to talk about how you can put it into action.

Happy aligning!

About Salesforce

Nothing makes us happier than seeing sales and marketing colleagues getting together and seamlessly converting leads to sales.

Find out more about how our cloud-based applications and dashboards can help you do just that.

Take a Free trial