



How To Align Sales And Marketing Teams To Generate Leads, Nurture Them And Close More Deals

Breaking Down the Traditional Silos and Tension Between Sales and Marketing

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How to Align Sales and Marketing Teams to Generate Leads, Nurture Them and Close More Deals:

Breaking Down the Traditional Silos and Tension Between Sales and Marketing

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About Cleriti

Cleriti is Cincinnati's premier inbound marketing agency helping companies get more leads online, nurture them and clearly track how they become customers. Connect, convince and convert with clarity. You're growth oriented, and so are we. We care about achieving the most remarkable customer results and growth through the power of inbound marketing. We use this framework to adapt our overall strategy to get a higher marketing ROI.

We are a HubSpot Certified Gold Partner filled with the most positive and growth-driven marketers, creatives and content experts, and website, data and process geeks. We are ready to become what feels like an in-house extension of your marketing team that won't settle for anything but reaching your marketing and revenue goals — and setting new goals as we grow.

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TABLE OF CONTENTS

SECTION 1: Introduction	04
SECTION 2: The Tension Between Marketing and Sales Is Killing Your Business	06
SECTION 3: How to Set a Service Level Agreement Between Marketing and Sales	07
SECTION 4: Shifting Focus and Measuring the Entire Customer Experience	10
SECTION 5: Conclusions and Next Steps	12



SECTION 1: INTRODUCTION



In a perfect world, sales and marketing would work together like peanut butter and jelly — two separate units that come together to drive a company's revenue through the roof. Unfortunately, it rarely works out this way. According to the Harvard Business Review, [*87 percent of the terms*](#) used by sales and marketing teams to describe each other in a survey were negative. That's not good. In a world where proper marketing and sales alignment yields so many positives — better lead follow-up, better marketing collateral, better sales tactics — the reality is that most companies miss the mark.

The marketing and sales disconnect exists largely because each unit is focused on meeting its own set of objectives and isn't concerned about what's happening in other areas of the company. To say that marketing has a lot on its plate is a gross understatement. Marketers feel an urgency to complete a high volume of tasks across multiple platforms and channels, and then to assess analytics to make improvements on what drove the most measurable results like visits, traffic and leads. In addition, they feel the pressure to keep up with the latest trends, channels, apps and strategies in content marketing, inbound marketing, SEO, website design, digital advertising and way, way more.

It's not an easy task, and the average marketer is busy enough focusing only on these categories.

It's no picnic for sales, either. The sales team has a quota to hit, and in most cases, sales reps don't truly understand where leads come from, and what marketing had to do with it. All sales knows is that it has to convert these customers, even if they have no idea what made marketing think they're qualified leads worth pursuing. Without that knowledge, they don't truly understand the audience to which they're selling, and you can imagine how much money is lost because of these misunderstandings.

In this modern-day arrangement, both sales and marketing miss out on their chance to make more money and increase their standing within the company. But really, it's the customer that loses out when marketing and sales can't get on the same page.

Read on to learn why a lack of sales and marketing alignment hurts your business, and how you can work to bring the two teams together to provide a customer experience that will engage your leads and help grow your company.

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SECTION 2: THE TENSION BETWEEN MARKETING AND SALES IS KILLING YOUR BUSINESS

For many marketers and sales representatives, it's obvious that average marketing and sales teams don't work together. What's particularly troubling is that so few companies realize it's an issue that is detrimental to their success.

Let's go back to that stat about sales and marketing having largely negative words to say about each other. Not only do these groups have trouble working together, but **they have very strong opinions about the ineffectiveness of the other party.** That's not an easy situation to navigate. Could you work with a cubicle mate that constantly criticizes you? Probably not. And yet, that's what sales and marketing are tasked with each day.

It's a shame because when properly aligned, sales and marketing can produce massive results. According to SalesLogix, **companies with strong marketing and sales alignment [grow as much as 20 percent each year](#).** On the other hand, companies with a marketing and sales disconnect see a revenue loss of four percent annually.

Which number do you want your company to be associated with?

It's clear that a happy marriage between sales and marketing is the way to go. Of course, **if it was as easy as simply decreeing that these two groups should work together, everyone would do it.** It's imperative that you reduce the simmering anger between sales and marketing before it swallows up your company, leaving your sales and marketing teams to blame each other for your latest downturn in revenue. After all, if your teams can't focus on what really matters — working together to provide a better experience and better resources for the customer — another competitor will.



SECTION 3: HOW TO SET A SERVICE LEVEL AGREEMENT BETWEEN MARKETING AND SALES

Asking sales and marketing to play nicely together isn't enough to implement the massive changes that will be needed to create the alignment your company needs to grow. It's best to sit down and create a service level agreement that governs the relationship between sales and marketing and holds each team accountable for tasks and communication with one another.

A [service level agreement](#) (SLA) is a document that details exactly how sales and marketing should function together. It includes numbers, goals and guidelines that each team will adhere to in the future. In short, it spells out every way in which sales and marketing will work together to reach and follow up with potential customers to improve processes and boost your company's revenue.

For teams that aren't aligned, this SLA process might seem like overkill at first. But it really isn't. If you need proof that an SLA is worth your while, re-read the sections about the negative terms and lost revenue associated with marketing and sales disconnect. You should also consider the fact that, as per Hubspot, companies with current SLAs are [34 percent more likely to see an annual increase](#) in

their return on investment than companies without SLAs.

Face it: an SLA is a productive use of your company's resources. If your marketing and sales teams want to see growth — which is really the ultimate goal for each of them — then alignment is needed to achieve that.

Below is a sample template of an SLA you can implement in your own company.

Marketing and Sales: Select the platform where you will house information on the entire buyer's journey, lead engagement and overall customer lifecycle.

[Customer relationship management software \(CRM\)](#), like Hubspot and Zapier, enables you to track your effectiveness in both sales and

marketing, making these programs ideal for both sides of the equation. Tracking both sales and marketing under one roof gives both groups access to pertinent information, and lead communication and follow-up information gives better insight into where those leads are at on the buyer's journey.

Marketing: I'm going to generate leads by doing X.

Establishing where marketing's leads come from can help sales to better understand why those leads are interested in the company. [Inbound marketing](#) is a great way for any business to generate legitimate, motivated leads, as well as other outbound methods such as targeted digital advertisements.

Marketing: We need to uncover/discover X information from prospects.

Gathering sales information from customers isn't easy, and it certainly isn't free. Providing [something of value](#) to interested leads, such as a white paper or exclusive video that helps them solve a problem, can entice potential customers to provide information needed by both sales and marketing (emails, phone numbers, addresses, etc.). This also helps to weed out the truly interested leads from the more passive observers, as only the interested ones will provide this information in exchange for a resource.

Marketing: I'm going to qualify leads by X factors.

Only [50 percent of companies](#) have an established definition of what constitutes a qualified lead. Putting this definition down on paper will help you decide which potential customers are really worth your sales team's time to follow up with. For example, while you should always go after people that meet your buyer persona, you may also want to open up your search to [larger companies or local leads](#).

Marketing: I'm going to hand leads to sales in X way.

When marketing is done vetting its leads, sales should have total assurance that they're going to be contacting legitimate prospects. Using an integrated CRM program is an ideal way to give sales its leads so that the reps can see all of the scoring and categorizing that has gone into generating and qualifying them. It also prevents overlap in communication with prospects, ensuring the customer experience is seamless across departments.

Sales: I'm going to follow up with my assigned leads with X attempts/sequence.

A defined sales process helps everyone in the company know what to expect.

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While the numbers indicate that [immediate follow-up is always the best policy](#), sales should be careful not to overwhelm the lead, which can cause them to sour on the company altogether. A standard introduction, like a voice message and an email right off the bat, is an effective best practice to follow.

Sales: Our sales will be measured in X stages.

Listing the exact criteria by which the sales team will be held accountable for results does a lot to set the tone of the entire sales experience. It also helps to take the heat off the marketing team, whom sales will not be allowed to blame if they can't meet their own pre-set criteria. Stating the follow-up tactics that will be carried out, as well as the expected results of these interactions, goes a long way to let all team members know where they stand.

Sales: I'm going to nurture and progress the relationship by doing X.

Although no two leads are identical, sales should have an idea of how they're going to advance their relationships with prospective customers and assess the long-term possibilities. If you don't spend the time talking with prospects and gathering insights, your marketing team will never deliver the right leads you are looking for. There is no magic bullet method to guarantee and consistently close new

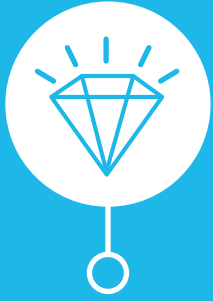
business. Sales reps can and should [use the content created by marketing](#) to whet the appetite of their leads, showing those potential customers that the sales team understands them and their needs.

Sales: We are going to propose doing business by doing X, and here is how we hand it to the service team.

At the end of the day, sales should know exactly what it's getting from marketing, and marketing should know exactly what sales is doing to close the leads provided by the marketing team. As such, each team should work together to develop a standard business proposal that sets expectations clearly and service teams can legitimately fulfill.

Marketing and Sales: We'll use closed loop reporting and insights for measuring efforts to results.

Without continued reporting, it's impossible to tell what impact the SLA has on the company. All of the data recorded by each team should be [measured on a consistent basis](#). For example, the company's goal may be to have a certain number of marketing opportunities, which should lead to a number of qualified leads, which should then lead to a specific number of closed sales. The reporting should measure these areas and show where the company is strong, as well as where work is needed.



SECTION 4: SHIFTING THE FOCUS OF MARKETING AND SALES TO THE ENTIRE CUSTOMER EXPERIENCE

There's more to the sales and marketing alignment puzzle than devising and facilitating an SLA. The two teams must become comfortable enough within their roles to shift their focus to the ultimate prize: the customer.

In the end, the customer doesn't care about how you've solved the endless bickering between sales and marketing. **The customer just wants to be treated fairly and to have their problems alleviated, no matter who they're in contact with in your organization.** That's the real goal of marketing and sales alignment, and that should be the focus of both teams once they get used to their new arrangement.

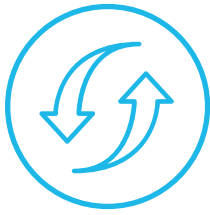
It's wise to track engagement, successes and failures at vital transition points in the buyer's journey to ensure your new alignment is focused around improving your company's customer experience. **Continuously developing the following factors** will help both sales and marketing develop tactics that strengthen their alignment, make better connections with leads and ultimately lead to revenue growth.



- How Prospects Find You
 - Whether people find your company via inbound marketing, offline marketing, social media, referrals, etc., marketing needs to nail down what tactics work best to reach your company's target audience.



- How They Become a Lead
 - What gets a potential customer to take the next step and provide their information to your marketing team?



- How You Follow Up With Leads
 - The steps taken by sales to initiate contact with a lead should evolve as reps learn what works, and the results of those interactions should be tracked to get those insights.



- How You Nurture and Help Leads
 - Track lead nurturing information to identify the best follow-up tactics to move leads down the sales funnel.



- How You Will Service Leads
 - Any promised and executed post-sale follow up that gives customers peace of mind as they make a purchase and begin using your product/service should be tracked.



- How They Rate Their Experience With You
 - Gather honest feedback from customers to help sales and marketing teams understand what they did right along the buyer's journey and where they need to improve their approach.



- How Your Customers Refer More Business
 - Repeat business and customer referrals are the golden tickets of the sales process — keep track of these metrics to show when you've done something right so both teams can repeat tactics that worked to gain referrals. In addition, pay attention to what customers need from you next to further develop your business and service offerings.

As your teams learn to work together and fulfill the SLA they've agreed upon, the customer engagement points mentioned above can be optimized for maximum impact and success as positive sales results occur over time.

SECTION 5

CONCLUSION: NEXT STEPS

The primary benefit of aligning sales and marketing is that it makes the jobs of both teams drastically easier. [*Nearly two-thirds of sales reps complain*](#) that they can't find content that they need to send to leads. The marketing and sales disconnect literally prevents your employees from doing their jobs to the best of their abilities. **Fixing this relationship will boost morale in these vital teams, encouraging them to excel in their positions for themselves, for each other and for their company.**

Plus, creating a bridge between your sales and marketing teams not only helps them work and grow together, but contributes to your organization's overall revenue goals. Most importantly, this alignment results in a better experience for your current and future customers.

While it may seem like a daunting task at first, **your company's next step to success is developing an alliance between sales and marketing.** It's a win for your entire organization — your C-Suite will be happy, your coworkers will be happy and, best of all, your customers will be happy.

