

The Vital Necessity of Aligning Sales and Marketing

In today's business enterprises, Sales and Marketing are commonly divorced. In fact their behavior can actually parallel that of a divorced couple—constantly bickering and blaming each other over lead quality and quantity. Marketing will assert that Sales just isn't following up the leads they have and is wasting them, while Sales will claim that Marketing is providing too many leads that just don't pan out.

The good news: This situation can not only be rectified, but in fact Sales and Marketing can be brought together to work as a team so that leads are more consistent both in quality and quantity. In this white paper we will examine some best practices on this alignment—practices you can begin implementing in your company right away.

I. Why Align Sales and Marketing?

Sales and Marketing actually have one common goal: To secure increasing business for their company. They go about it in different ways and have different roles in the overall sales process: Marketing is responsible for spreading the word and sparking interest in the company's products or services, while Sales takes the leads Marketing has brought in and cultivates them into closed sales.

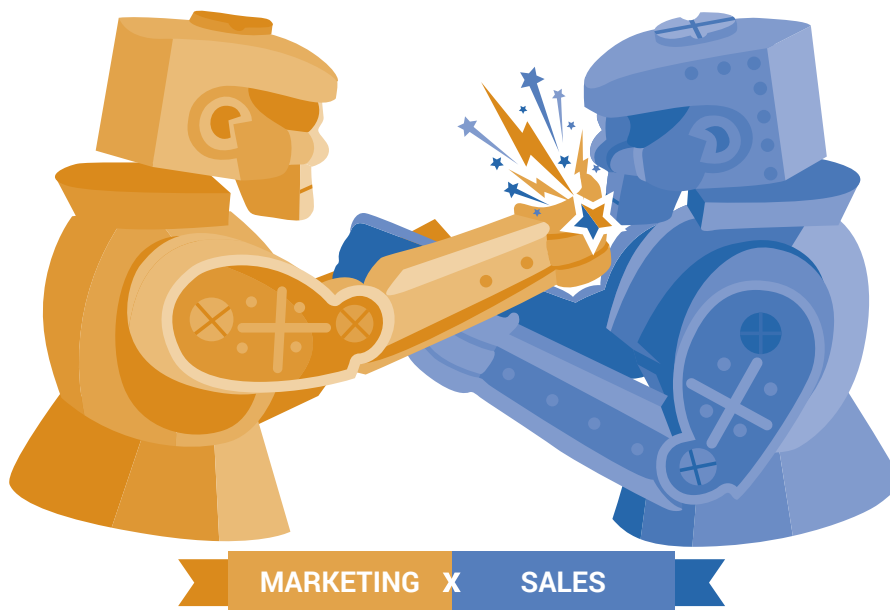
Marketing and Sales also have differing perspectives, and therefore differing approaches, to this goal. Marketing considers itself “plugged in” to the company's overall industry and market; and through extensive and continuing research, it usually is. Markets, industries and overall economies are dynamic and subject to change, and it is up to Marketing to figure out ways to adapt to—and take advantage of—those changes. Marketing is therefore prone to an “experimental” frame of mind, always willing to try new approaches and methods of reaching potential customers.

Sales is usually of a different view: If something isn't broken, don't fix it. If they have a steady flow of leads of a particular type they've been able to close, they are likely to complain loudly when Marketing wants to “experiment.”

When Marketing and Sales are operating without alignment and without effective coordination in their own independent spheres, this is the kind of situation that can continue unresolved to the end of time. But when Sales and Marketing are working in accord, Marketing can be given room to run their tests on new methods and approaches, while at the same time maintaining the most effective lead generation vehicles and campaigns for Sales. Both are succeeding in their independent realms and—most importantly—are succeeding as a unit to build and increase the company's bottom line.

II. Define Your Terms

“If you’re going to argue with me, define your terms!” This challenge, thrown down by French philosopher Voltaire in the 18th century, is one that if used more today would solve a lot of issues. In our case, it can certainly go a long way to bridging the gulf between Sales and Marketing—for there is rarely if ever agreement between Sales and Marketing on, for example, the definition of the term “qualified lead.” For Marketing, that can be any lead at all that comes through the door. A salesperson, though, wants someone who is ready to buy or close to it. And rarely the twain shall meet.



IF YOU CLOSELY EXAMINE A LEAD, YOU’LL FIND THAT IT FALLS INTO ONE OF THREE ROUGH CATEGORIES:

- 1 RAW LEADS:** Leads that have come in straight from the field that haven’t been contacted or qualified in any way at all.
- 2 WARM LEADS:** Leads that have had some qualification done—or had some qualification coming in the door—that shows a definite interest in your company’s product or service, and potentially the budget to purchase.
- 3 HOT LEADS:** Leads that show someone having a strong interest in your product or service, who definitely has funding available, and is ready to buy now or in the very near future.

It is categories 1 and 2 that Marketing is most commonly forwarding to Sales—with an occasional 3. Sales, on the other hand, only wants 3 and will often ignore or not follow up any of those that fall much below that category. These persistent attitudes bring about a kind of “black hole” between Sales and Marketing, into which many leads and potential revenue are lost because they’re not being pursued and hotted up.

Before any further action can be taken to obtain alignment and accord between Marketing and Sales, both need to fully agree on terms such as those listed above. When the two factions have come to a mutual understanding on leads and their various levels—and what actually constitutes a “qualified lead”—the next steps can be taken.

III. Knowing Your Buyers

This step is actually an extension of the previous step; here you are establishing, defining and agreeing upon the buyer patterns that both Sales and Marketing are engaged with.

UNDERSTANDING COMMON BUYER PATTERNS FOR THE VARIOUS TYPES OF DECISION-MAKERS YOUR COMPANY DEALS WITH IN SELLING YOUR PRODUCT OR SERVICE WILL ACCOMPLISH TWO THINGS:

- A** It will allow Marketing to finely tune marketing communications to reach the decision makers that you need to respond to your promotion.
- B** It allows Sales to establish best practices with regard to known buying patterns, and to vary their approaches depending on the decision-maker they are dealing with.

The best source of information to fully understand buyer behavior would be direct contact, with decision-makers within potential prospect companies. You want to learn all about them, the general issues they are confronted with and what situations exist within the company that your product would solve. You want to know what would move decision-makers along the sales cycle, and what would cause them to forward the potential purchase up the line to the next decision-maker.

While contact with prospects is considered the territory of Sales, some direct contact from Marketing to potential prospects would greatly strengthen their understanding of buyer behavior. Minimally Marketing needs to do this market research through direct contact with existing clients and get this specific information from these, from their perspective before they purchased. Additional research can also be conducted by way of different online forums and industry publications. As well, a marketing survey of your own company’s successful salespeople can provide some good insight into buyer behavior.

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Now, what about all those leads that Sales has been neglecting because they’re just not

hot enough? What can be done about those to turn them into the “hot” leads that Sales needs and wants?

The thing not to do is to just ignore them, which can often be the tactic taken. There is no surer way for lukewarm leads to grow completely cold than by simply never communicating to them.

A number of companies solve this problem by employing sales development reps (SDRs) who nurture the leads. The SDRs can further qualify the leads, and eliminate any that clearly will never purchase. Those that qualify can be regularly contacted, be provided with vital information that fits their position in the sales process, and over time brought up the lead quality scale to the point at which a sales rep can then contact and potentially close them.

Another approach is one taken by Marketing: lukewarm leads are put on a “drip marketing” campaign, which keeps them in contact with the company and steadily increases their interest. Once they have come up to being strongly interested, a sales rep can then take over.

Whether addressed by Sales or Marketing, leads that are being “hotted up” should have a place within the sales process so they can always be taken into account and tracked.

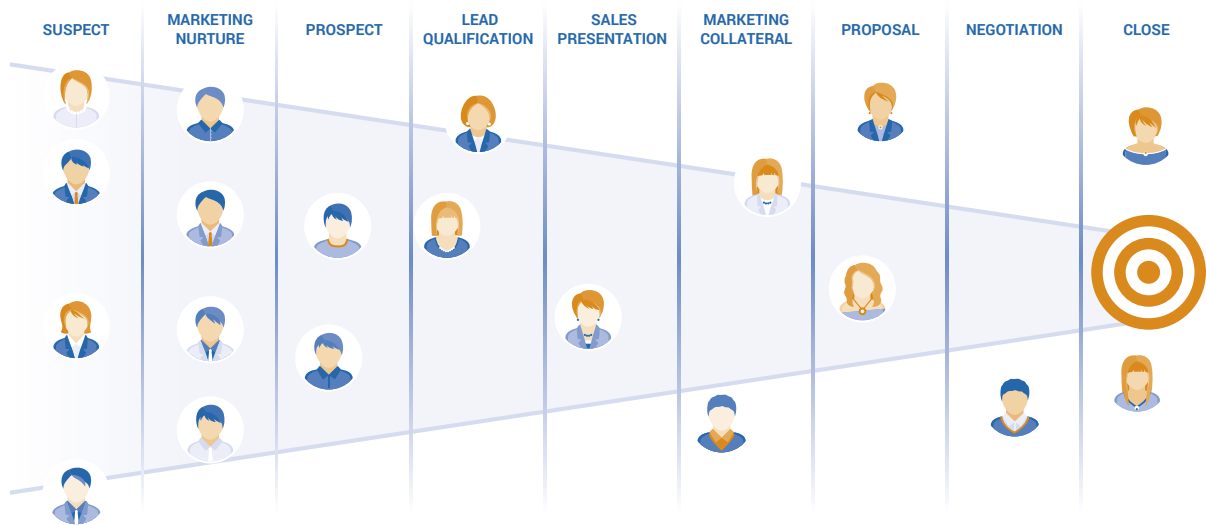
This category of leads would include those that expressed strong interest at one point, but weren’t ready to buy for a considerable length of time. Simply waiting until that time has passed and then re-contacting them will often find them having purchased another product; in the silence created by your company a competitor has swept in, seen to the company’s needs, and closed them on the competing product. The key is to keep them in steady contact with your company so that they aren’t lost, and can eventually be closed.

IV. The Role of CRM

A CRM application is normally used only in Sales, and is most often utilized by company and sales management to monitor sales and ensure they are staying on quota. But today forward-thinking companies have realized that a CRM application can be much more than a sales monitoring device: it can actually empower sales reps, and beyond that enable Marketing to monitor their leads and assist in moving sales along the sales pipeline.

A leading-edge CRM solution, such as Pipeliner CRM, is fully adaptable to a company’s sales process. This allows sales reps to rapidly record and retrieve vital information on each and every sales cycle they have in progress. It also makes it possible for sales management and other relevant departments and executives to quickly and easily view and analyze sales from lead to close.

It is a fact, however, that the sales process includes Marketing—for Marketing is bringing in the leads, and has a vested interest in seeing how the leads are progressing along the pipeline. They can monitor the number of leads in the pipeline and, utilizing the average close ratio for that sales force, ensure there are enough leads there to sustain them. If Sales is complaining about a particular



lead source, Marketing can actually go in and verify the situation for themselves. Marketing can also take a proactive stance in such a situation: Through CRM Marketing can see if a particular type of lead is commonly falling off at a particular stage of the sales process—and rather than waiting for Sales to complain about it can take action.

Additionally Marketing can provide specific collateral materials that will not only “heat up” lukewarm leads, but assist sales reps in moving sales to the next stage of the sales pipeline. As sales are being worked, sales reps can have needed collateral materials right where they need them; reps can just click and send to the prospect.

As Sales and Marketing become truly united, the sales process (and therefore CRM) can and should be extended to include Marketing steps. A simplified example of a unified pipeline might be: Suspect / Marketing Nurture / Prospect / Lead Qualification / Sales Presentation / Marketing Collateral / Proposal / Negotiation / Close. With Pipeliner CRM, inclusion of Marketing is made easier through its compatibility with robust Marketing automation tools such as Hubspot, MailChimp and Constant Contact.

This kind of interaction can only be possible if the CRM application is so intuitive it can be easily followed and utilized by Sales and non-Sales personnel alike. Pipeliner CRM excels in this regard.

The right CRM solution is factually the final piece in bringing Sales and Marketing together as a cooperative team that together consistently meets and exceeds sales quotas.

V. Conclusion

Sales and Marketing have been opposed for decades—but the time has come to make them into the powerful team that has always potentially existed. It is the only way that a company can truly succeed in today's hectic and fiercely competitive business environment. This is accomplished by Sales and Marketing agreement on lead terminology, effective market research and agreement upon common buyer profiles, and the establishment of methods for utilizing the majority of leads that come through the door. And the cooperative activity of Sales and Marketing can now be properly facilitated by the deployment of a leading-edge CRM solution such as Pipeliner CRM.

IN UNITY THERE IS POWER.

For business, that unity must exist between Sales and Marketing.



About Pipelinersales Inc.

Pipelinersales Inc. develops CRM solutions to empower sales teams with the ability to manage the complexities of sales. Pipeliner CRM is the easy to use CRM tool, that increases sales productivity by improving the sales process framework.

For more information on Pipeliner CRM visit pipelinersales.com.

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