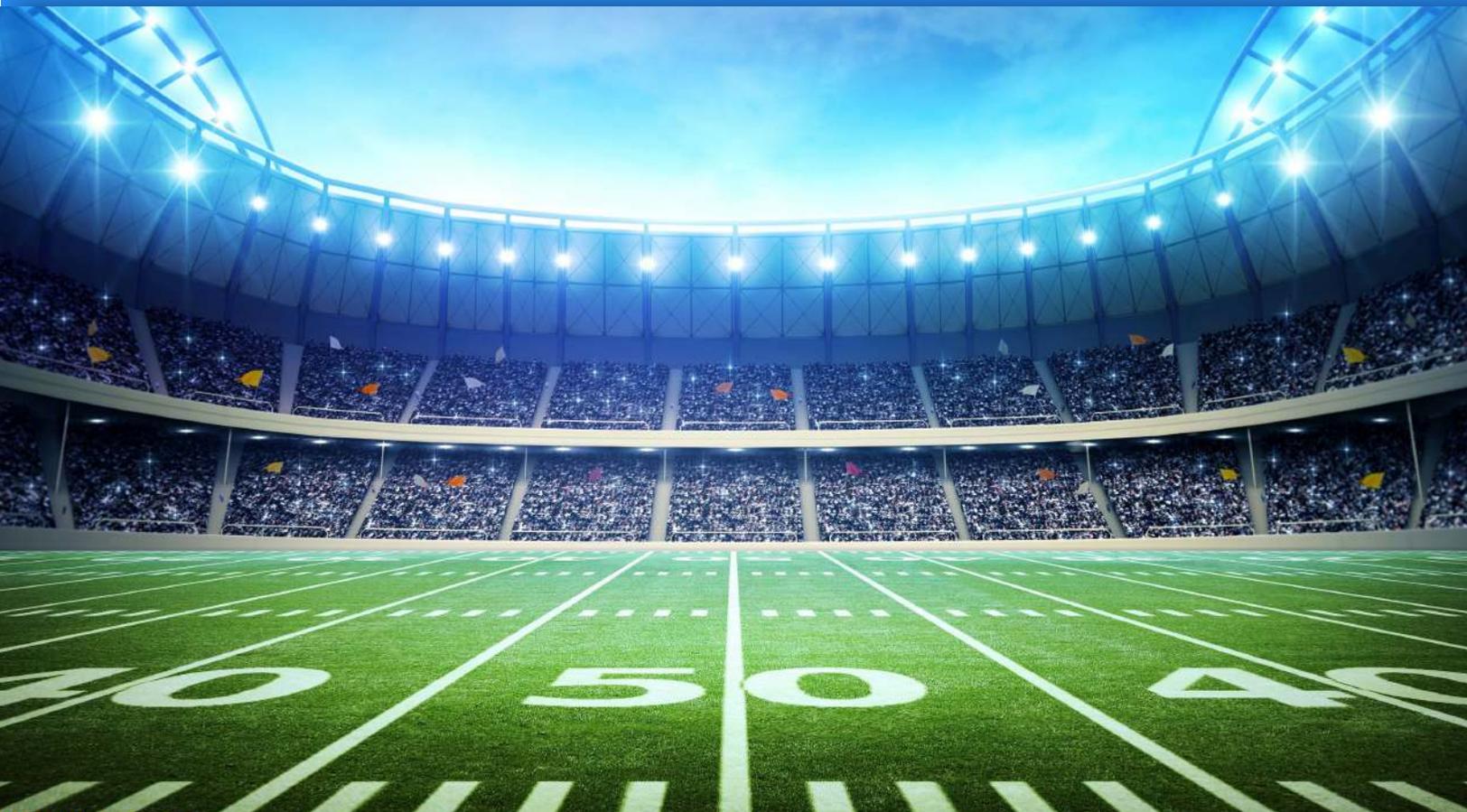


MULTIPLE SOURCES
OPTIMIZATION
WEB-BASED PROCESS



The Official
PLAYBOOK for
Sales & Marketing
ALIGNMENT



Pre-Game Notes

In a perfect world, sales and marketing would function in complete harmony, collaborating with ease to drive revenue growth. However, in reality, the relationship between sales and marketing can be tenuous, with siloed sales and marketing teams deeply enmeshed in their own processes and oblivious to what their counterparts are doing.

Your sales and marketing teams should be working in tandem like the offensive line of a football team. In far too many organizations, sales and marketing function as entirely disparate teams rather than working together towards the same end goal—driving revenue.

In the B2B game, sales and marketing's win record is inherently tied to their ability to work together. According to the Aberdeen Group, highly aligned organizations achieve an average of 32% year-over-year growth, with their non-aligned competitors experiencing a 7% decrease.

The stats don't lie; sales and marketing alignment is crucial for a game-winning strategy. But the complicated dynamic that can exist between sales and marketing teams can't be fixed overnight. A proper sales and marketing alignment strategy should be deeply ingrained in your workflows, touching every step of the sales and marketing process.

From content to lead nurturing to reporting, sales and marketing alignment needs to be a key focus throughout your organization. So get your game face on and prepare to win big with the help of Verify's official playbook for sales and marketing alignment.

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Play #1: Improve Communication for Better Gameplay on the Field

Poor communication can largely be blamed for the lack of synthesis between sales and marketing. Long-standing communication issues cause friction and confusion, hindering clarity and contributing to the divide between sales and marketing. Along with technology, improving communication should be a foundational element of your sales and marketing alignment strategy. Better communication can help bridge the gap between sales and marketing; as such, your communication betterment efforts need to be considerable.

Ideally, marketing should attend weekly sales meetings and be kept firmly in the loop with what's new in sales. A team email alias that goes to both sales and marketing is a great play to guarantee teams are kept up to speed with what's going on. Sales and marketing alignment has to be an ongoing process; by consistently making the effort to encourage sales and marketing interaction, your organization will get into the habit of making it a priority. Once you're in the habit of doing things like conducting joint sales and marketing onboarding for new hires or arranging get-togethers for sales and marketing, alignment starts to become a naturally occurring facet of your organization.

¹ Aberdeen Research Group, "Sales Enablement: Fulfilling the Last Frontier of Marketing-Sales Alignment," Aberdeen Research Group, accessed September 22, 2017

Sales and marketing alignment isn't something that can be built from the ground up. Despite how motivated sales or marketing teams might be to achieve better communication, their efforts will be fruitless without support from the top down.

Getting leadership on board is essential to streamlining your sales and marketing processes. Championship-worthy teams don't make it to the big game without stellar leadership and coaching to pave the way.

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Play #2: Master Your Lingo

This key play is part and parcel with improving communication, but it warrants its own category because the shared vernacular (or lack thereof) of sales and marketing can make or break your alignment efforts.

If sales and marketing lack common definitions, especially when it comes to terms related to the sales funnel (leads, MQLs, SQLs, opportunities, customers, etc.), then your other attempts to improve alignment don't really matter. If sales and marketing are working with the same metrics but have *different conceptions of what those metrics mean*, this creates confusion (at best) and downright resentment (at worst), especially when the pressure to generate revenue is mounting

Implement Service-Level Agreements (SLAs) in your Lead Management Process.

To get everyone on the same page, marketing and sales need to really hone in and focus on mastering an effective lead management process.

² "6 Keys to Sales and Marketing Alignment," Salesforce Pardot, December 5, 2013, <https://www.pardot.com/whitepapers/guide-sales-marketing-alignment/>.

A service-level agreement (SLA) can rectify any definitional nuances between sales and marketing and reduce confusion or miscommunication between teams.

[Additionally, SLAs ensure smoother handoffs between teams](#) and gives way to a more intuitive workflow as expectations for who does what, when, and how often become more clearly defined. SLAs also give sales the chance to ensure the lead management process is to their liking and to clearly define the quantity and quality of leads they need to have from marketing to be successful.

SLAs should cover:

- What can be considered as a marketing-qualified lead (MQL);
- What can be considered as a sales-accepted lead (SAL) and sales-qualified lead (SQL);
- How many MQLs sales should expect to receive from marketing;
- How the lead handoff process should be handled, including who will be alerted, how, and when;
- Sales follow-up process, including timeframe and contact attempts;
- What to do with expired MQLs, SALs, and SQLs;
- Next steps for unresponsive leads

Though marketing can own the SLA creation process, SLA development should be a collaborative endeavor, with input from both sales and marketing. It's important to also be proactive about keeping your SLAs up to date, reviewing and updating them on a routine basis as sales goals and lead requirements change.

[Play #3: Automate Your Lead Qualification Process](#)

Closer alignment with sales, by nature, helps improve lead quality which can prevent leads from getting cold or won over by competitors. Better-quality leads and retention means that sales has an easier time closing deals, which reduces your sales cycle and drives success for the entire company.

³ Ibid.

The lead-qualifying process can be tricky to master, but with the right tools, that doesn't have to be the case.

A marketing automation platform can enable marketers to qualify leads automatically based on how well they fit the mutual parameters set by sales and marketing with regard to ideal lead profiles.

Qualifying leads has long been a subjective process, but a marketing automation platform (MAP) can make the lead scoring and grading process more effective and straightforward, thereby eliminating inconsistencies in lead quality. Automating lead qualification also frees up more time for both sales and marketing to focus their efforts on the best leads, while still educating and managing less-qualified leads in a more time-efficient way.

Once you've automated your lead qualification process, consider setting up a data integration between your MAP and sales engagement platform. Connecting these applications creates a more seamless lead hand-off process by automatically passing qualified leads directly into a 'follow up queue' for sales.

Play #4: Turnover your Bad Data

If you're a B2B marketer, you likely already know how frustrating bad data can be. From incomplete form-fill data and dreaded freemail addresses to contact data going bad as a result of job turnover, the effect of bad data reverberates through your marketing departments and into sales.

According to LeadJen, "[conducting a lead generation program without first investing in cleaning data](#) wastes 27.3% of each sales rep's time, or 546 hours on average per year per rep."

Not only is marketing wasting time marketing to lower-quality leads, but sales is losing out on valuable time that could be better spent focusing on qualified leads.

Even if your marketing campaigns are delivering solid results, you aren't immune from the trickle-down effect of bad data. It's essential to cleanse and update your existing contact records to ensure that you are marketing to the right people and driving leads through your funnel that are worth selling to.

As we have all heard, time is money, and your bad data is costing you time and money. As if that isn't enough of an impetus to cleanse your data, bad data also skews your customer profiles and makes it difficult to intelligently market to them, as outdated contacts in your database places limitations on your scope.

Perhaps worst of all, bad data can make you look bad to your customers. There's nothing more embarrassing than sending an email to a prospect and realizing you've marketed to the wrong title based on outdated data. The quality of your data carries utmost importance in terms of aligning sales and marketing teams to ensure success.

Play #5: Warm Up Your Leads

Just as Tom Brady wouldn't dream of stepping onto the field in a playoff game without first stretching and warming up his muscles, sales and marketing should warm up their leads before putting them into play.

⁴ "5 Tips For Improving Sales And Marketing Alignment To Drive Revenue," Square2 Marketing, 2, accessed September 26, 2017, <https://www.square2marketing.com/5-proven-techniques-that-ensure-sales-and-marketing-alignment-to-drive-revenue>.



According to LeadJen,

conducting a lead generation program without first investing in cleaning data wastes 27.3% of each sales rep's time, or 546 hours on average per year per rep.

⁵ "Cost of Not Validating Data," LeadJen <https://www.leadjen.com/wp-content/uploads/2016/10/data-ROI-report-cost-of-not-validating-data-whitepaper.pdf>.

⁶ "6 Keys to Sales and Marketing Alignment."

According to [Marketo](#), “companies that excel at lead nurturing generate 50% more sales-ready leads at 33% lower cost.”

When marketing is swamped executing marketing campaigns to hot leads, it can be all too easy to forget about your non-sales ready leads. Ignoring leads that aren't ready to purchase can lead to missed opportunities when they could have otherwise been nurtured into a sales-ready state. Both sales and marketing are missing out on lucrative prospects by not nurturing their leads properly.

Even if your existing marketing campaigns are performing well, lead nurturing must still be an essential part of your sales and marketing alignment strategy and should be integrated into your existing workflows and processes rather than live on the sidelines while you focus on hotter leads.

Marketing automation makes it easy to nurture cooler leads automatically, adding leads to drip campaigns that automatically send leads relevant messaging and nurturing them with little effort from sales or marketing.

Whether sales or marketing decides to be at the helm of the lead nurture process, lead nurture needs to be a priority if you're serious about sales and marketing alignment, as it can make a tangible difference in revenue and drastically save time for both teams.

Play #6: Get the Win with ABM

Just as definitional discrepancies between sales and marketing can derail alignment efforts, alignment is also stalled when marketing speaks in terms of “leads” and sales speaks in “accounts”. Many marketing departments are lead-focused as a result of efforts driven by marketing automation, which favors lead-focused vernacular (lead acquisition, lead scoring, lead nurturing, etc.). Meanwhile, sales is zeroed in on closing accounts.

Thankfully, account-based marketing has become a cornerstone marketing strategy for many modern B2B marketers, and the shift towards an account-focused mindset complements how sales already is working.

For ABM to be properly implemented in a way that naturally synthesizes with sales' efforts, though, your ABM strategy needs to be data-driven. Marketing needs to keep their contact data up to date and as comprehensive as possible to ensure they can accurately identify target accounts that fit their ideal buyer personas so they can adapt their messaging and approach accordingly.

By using clean, accurate data, B2B marketers can amplify the efficacy of their targeted campaign efforts because they are better able to understand the buyers within their targeted accounts. As a result, when marketing kicks those prospects over to sales, the account-driven mindsight of both teams allows for a seamless transition and makes for a smoother close.

Play #7: Line Up your Buyer Personas

Now that you've embraced the ABM approach and adopted an account-focused mindset, it's time to build out buyer personas. Constructing buyer personas is a vital part of alignment, because it takes into consideration the customers' point of view. Since so much of the purchase process is self-directed due to the ubiquity of technology, aligned sales and marketing departments need to base their messaging and approach on completely separate groups of customer profiles.

Building out buyer personas inherently drives sales and marketing alignment and requires both teams to get on the same page about what kind of leads yield the best results. Marketing needs to develop a handful of buyer personas that line up with your sales reps' standards for what defines a perfect lead.

Sales reps have inside knowledge about what types of prospects are more likely to close, and [developing buyer personas](#) is a foolproof way to come to an agreement concerning the types of leads that need to be developed, how to increase close rates, and improve the value of marketing-sourced leads.

The Benefits of Buyer Personas

One of the most significant benefits of building buyer personas is that once completed, you have a robust and detailed roster of your targets, so marketing and sales both know exactly the type of person they are speaking to.

Buyer personas lay the groundwork for sales to exhibit genuine empathy with target buyers, better able to express an authentic understanding of buyer pain points and offer a solution to their problems.

For marketing, buyer personas offer a chance to create truly relevant content and messaging that elicits engagement from the buyer because it is so adeptly tailored to their unique needs.

Building Your Buyer Personas

The task of building your buyer personas involves recognizing and highlighting what information each of your buyer personas needs throughout the buying cycle.

⁷ "How to Define Buyer Personas for Account-Based Marketing (ABM)," Terminus

Your process should probably look something like this:

- Identify and define your buyer personas
- Identify the specific questions and concerns your personas will have in each stage of the buying cycle
- Answer those questions
- Map the content you serve to each persona at each phase in the buying cycle
- Audit your existing content and determine if you have the content needed to answer the specific questions and concerns for each buyer persona

Focus on Specific Buyer Roles

When building these personas, think about the role of your specific buyer.

Ask yourself:

- What are this buyer's pain points?
- Will this person use my solution day-to-day?
- What motivates their decisions?
- Where do they get their information for purchase decisions?
- What type of content and information do they deem as valuable when researching a purchase?
- What organizations do they belong to?
- What events do they attend?
- At what point in the buying cycle does this buyer engage with vendor sales teams?
- Who they consult for purchase validation?

With those questions answered, build out 3-4 distinct buyer personas to develop messaging for. Next, map content to the way customers buy. Okay, now once again, for emphasis: map your content to your customer's buying cycle, not your sales cycle. This paints a clearer picture for both sales and marketing as to where your buyer's head is at throughout the sales cycle.

⁸ "Mapping Marketing Content to Prospect Buying Cycles with Sales Enablement," Compare Business Products, June 27, 2011, <http://www.comparebusinessproducts.com/briefs/mapping-marketing-content-prospect-buying-cycles-sales>.

Play #8: Captivate Your Audience with Content

Many B2B marketers forgo building buyer personas for a multitude of reasons, from lack of time to lack of money or experience building personas. While this might not seem like a big deal, the potential efficacy of your content is hugely hindered without having buyer personas to map your content to. Trying to create content that is vaguely directed at multiple different audiences at various stages in the buying cycle simply won't cut it anymore.

In fact, [IDG Connect's IT Buyer Survey](#) examined the cost of irrelevant content and found that irrelevant content can severely hamper marketing efforts by:

- Increasing the cost of content creation
- Reducing the chance of closing a sale by almost 50%
- Lowering the chance of make a buyer's selection shortlist by 30%
- Lengthening the decision-making process for buyers by two weeks or more

Mapping your content to buyer personas helps prove the utility of content and elevate content ROI, in addition to making it easier to fire off the right content at the right time in the buying cycle.

Coordinate with Sales for Content Creation

According to IDC,

up to **80%** of content
created by marketing
never sees the light
of day after it's
handed off to the
sales team.

This, obviously, presents a massive problem. First, that is valuable time spent by marketing developing something that never reaches its intended audience. Second, delivering appropriately timed, relevant content to the right buyer can have a considerable impact on the effectiveness of your sales efforts. By not using the content available to them, sales is missing out on an opportunity to attract their buyer's interest and entice them to engage with the brand in a way that organically fulfills the buyers' needs.

Marketing needs to focus on coordinating with sales to establish a content creation process that incorporates insights from the sales team. For marketing to create the most relevant content, they need to know what type of content sales needs to share with prospects to attract new leads.

Encouraging sales to submit content creation requests to marketing when they identify a content theme or asset that sales could use to engage their prospects. Additionally, involving sales in the content creation process by encouraging them to refer existing customers for case studies or surveys is a fantastic way to keep content relevant to potential buyers, since it finds its roots in the former pain points of past buyers.

Keep Messaging Consistent

Although incorporating sales into the content creation process is vital, it's important to also remember to keep the tone of all messaging consistent across all facets of the organization. All too often, sales and marketing get in the habit of utilizing different sets of content assets in their communication with prospects, leads, and customers.

You don't want a sales rep and a marketer both going after a prospect and trying to build rapport with them, only to scare them off with email overload and inconsistent messaging. Sales and marketing need to be on the same page in terms of how they talk about your organization's products and services. Consistent messaging across the board ensures that customers and prospects hear a strong, clear message about the company regardless of who interacts with prospects and customers.

[Play #9: Step Up Your Sales Enablement Game](#)

Sales is most effective at selling when they understand the buyer. They need to be able to share a common interest with prospects and customers in order to guide them through the buyer journey.

Sales enablement should be a priority as part of your alignment strategy, as sales enablement can help combine sales and marketing efforts for maximum impact. When marketing utilizes buyer personas and takes a customer-centric approach to sales enablement, they are able to understand the buyer more deeply and drive the creation of sales enablement content that focuses on the buyer rather than your product or solution.

From there, sales takes the ball and runs with it. Because marketing can't create content for every unique buyer situation, it's up to sales to add context and commentary to the individual buyer situation, simultaneously adding additional value to the content consumed while helping the buyer visualize their future with your company.

⁹ Ibid.

Play #10: Track Your Metrics

For sales and marketing, the end goal is usually the same (i.e. revenue) but the metrics used to track the success of respective teams are often different. If you truly want sales and marketing alignment, this needs to be course-corrected. Marketing's success—and the measurement thereof—should be inextricably linked to sales, with marketing being measured against the value of leads marketing provides to sales, as well as the quantity of leads.

Why? Because when each team keeps up with their own stats and metrics, a horrible quarter for sales could be a great quarter for marketing. Since both teams are working towards the same end goal, you can see why this discrepancy in performance is problematic.

If one team is achieving and the other is not, then the organization is suffering. A win for sales is a win for marketing, and vice versa. After all, we are all playing for the same team.

Closed-loop reporting can help promote visibility across the sales cycle, and it is important to work off of the same spreadsheet. If sales works off of one spreadsheet that reflects how many deals they need to close and how many opportunities they need, and marketing works off of another spreadsheet that reflects how many leads they need to generate for the month, both teams will have skewed metrics and an inefficient strategy. All those goals and metrics should live in the same place so both marketing and sales can view goals and progress.

Important metrics to track include:

Marketing

- Lead Trajectory; MQL Count
- Marketing Impact to Sales Pipeline; How many leads are turning into MQLs? To SQL?
- Marketing Pipeline Source; Where are leads coming from?
- Marketing Contribution to Revenue

Sales

- Revenue Forecast; Not every sale is the same. How long did sales stick around? Marketing should know sales pipeline trends to focus on the segments that make the most sense.
- Sales Pipeline Trends
- Pipeline Creation; Net-new Opportunities
- Closed Lost Opportunities; Why didn't they close and what can be adjusted?

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- Closed Lost Opportunities; Why didn't they close and what can be adjusted?

Both sales and marketing data tells a story that both teams need to know. It is important for both teams to understand what is happening across the pipeline.

Play #11: Adapt Your Game

When it comes to sales and marketing alignment, being adaptable is a part of the game. As your organization develops and grows, relationships and processes shift, leaving an imbalance in the wake. By actively making an effort to manage and tweak your sales and marketing strategy on a regular basis, you can circumvent obstacles easier and adjust rapidly to organizational change.

Regular monthly meetings between sales and marketing leadership can help both teams keep the goalpost in mind and fuel unity between them. Your SLAs should also be updated frequently; ideally, the MQL, SQL, and SAL definitions should be revisited at least every six months to ensure smooth communication between teams.

On the content side of things, marketing should be constantly adapting the content strategy in tandem with how sales is able to leverage content with prospects and the content they need created that could help close deals more swiftly.

If sales only has access to content that is already accessible to the buyer, you aren't fully leveraging your content strengths. Sales enablement content should address each stage of the buyer journey post-SQL to help the buyer visualize their future using your solution or services. Hold monthly or quarterly content meetings with sales to review content, discuss upcoming projects and updates, and touch base on content needs from sales.

¹¹ Leslie Ye, "20 Stats That Prove the Power of Sales and Marketing Synchronization [SlideShare]," accessed September 28, 2017, <https://blog.hubspot.com/sales/stats-that-prove-the-power-of-smarketing-slideshare>.

Overtime

They say champions are made in practice, and such is the case with sales and marketing alignment. To win together, sales and marketing have to put in the practice and hard work at it until both teams function in harmony.

According to *Hubspot*, companies with strong sales and marketing alignment generate 208% more revenue. Additionally, sales and marketing alignment brings a 36% higher customer retention rate and 38% higher sales win rates.

For sales and marketing, “winning together” isn’t just a sports metaphor (or a cheeky attempt by the writer to make sales and marketing alignment cute with a theme); sales and marketing literally win when they are closely aligned by driving revenue.

Sales and marketing alignment can seem like something to put on the bench while you focus on the real game—closing deals—but sales and marketing alignment actually makes that game better and more effective. If your team is inching towards the end zone but can’t seem to score, sales and marketing alignment is likely the play you need to implement in order to pull off the win.