

# 5 Steps to Conquering Sales and Marketing Alignment

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## **1. Create a Shared Sales and Marketing Strategy**

Together, sales and marketing associates should create a strategy for building business, which all team members buy into. It ought to lay out target markets and audiences, products or services, pricing, distribution channels, marketing and sales techniques and their shared revenue objectives.

All these elements are essential as each one can lead to disagreements. For example, The State of Sales and Marketing Alignment 2018 study discovered that the most significant reason for misalignment was disagreement on the primary target market.

## **2. Concur on Lead Definitions**

Leads are where misalignment between sales and marketing most frequently raises its ugly head. Sales reps say the leads marketing provides are “no good.” Marketing frets that they lose time and money generating leads that go to waste because salespeople fail to pursue them.

You can avoid these rifts between the two disciplines by creating a shared definition of marketing and sales leads. First, what delineates a marketing-qualified lead — one worthy of marketing’s time, energy and investment? Describe these leads using firmographic and demographic measures. For example, you might specify industry, potential sales value, company size, function and level.

The above criteria alone are not enough, however, to be considered sales qualified leads. Before salespeople are eager to follow up on leads, they want marketing to ensure they have the money and authority to make a purchase, interest in solving the problem your product or solution can resolve, and urgency to act soon.

Shared lead definitions force marketing to do the hard work of nurturing and qualifying leads before distributing them to sales. Plus, they give salespeople no excuse for passing over leads that come their way.

## **3. Define the Lead Handoff Process**

Even if a lead is sales qualified, if it does not arrive in a salesperson’s hands with all the information they need to do their jobs, it slows them down. That’s because before following up, they need to look for the missing information or call marketing to attain it. Given their time constraints, salespeople may decide instead to take the path of least resistance, pursuing the next lead, which includes all the crucial data. To avert this problem, sales and marketing need to decide what data needs to be included with the lead when marketing forwards it to sales. Basic information involves name, phone number, email and firmographics. Beyond that, you might want to include insights gained about the problem the contact faces, their authority to make decision, other parties to that decision, budget levels, competitive solutions they’re considering and when he or she expects to choose a product.

## **4. Take a Walk in Each Other’s Shoes**

There’s something to be said for understanding the daily challenges faced by the other team. The 2016 B2B Sales & Marketing Collaboration Study showed that companies that surpass their revenue objectives are twice as likely to have

marketers who take part in prospect and customer meetings than those that fail to hit their goals.

Marketing associates should invest a few days every year working with their colleagues in sales. Perhaps, they take a field trip or two to make face-to-face sales calls with field sales reps. This gives marketers a chance to hear directly from customers plus work with and develop a relationship with the salespeople.

Alternatively, they can listen in to inside sales calls.

It also helps for sales to have some involvement with marketing decisions. Perhaps they can collaborate with them on marketing content, data selection, and other sales materials. Another option is to meet with marketers. These processes provide an opportunity to get a feel for the hard work involved in executing marketing programs and the budget tradeoffs involved when deciding how best to generate leads.

## **5. Merge the Sales and Marketing Organization**

A powerful way to ensure an integrated effort is to bring sales and marketing into one function, under a chief sales and marketing officer. One person is in charge of creating a cohesive team responsible for optimizing the entire customer journey and lifetime value as well as meeting annual sales revenue goals.

Sales and marketing alignment is unlikely to happen unless there is a concerted effort to bring the two teams together. To help with this, your organization should create a shared sales and marketing strategy. Then agree on lead definitions and the lead handoff process. Sales and marketing associates should reserve time to work together. Finally, uniting the two disciplines under one leader can bring them together.

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