

The Ultimate Guide to: Sales and Marketing Alignment for Profit.

Getting your sales and marketing teams to work together will improve lead generation, sales closure rates and profitability.



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Your sales and marketing team perform two distinct, but closely related functions. Neither sales nor marketing can exist in isolation, so for the best possible outcomes, you need both teams working together towards common goals.

But interdepartmental rivalry, unresolved conflict and a lack of transparency often creates tension. Lost sales invariably turn into a “he said she said” battle of will:



Sales

“The leads were poor to start with. What is this junk marketing keep passing through to us?”.



Marketing

“Sales keep wasting the leads we send through. They never respond quickly enough so the customer goes elsewhere”.

With this kind of niggling conflict, it's going to take more than a software refresh to get sales and marketing working together properly.



Start with analysis

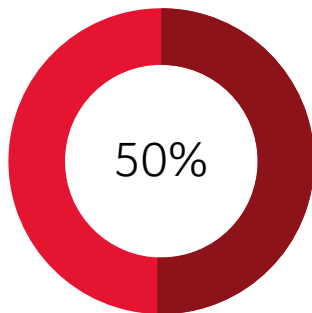
Before any progress can be made, your sales and marketing teams need to take a long, hard look at exactly what it is they do. Marketing needs to answer questions like how do we generate new leads? How are those leads qualified? How and when do we pass leads on to sales?

Similarly the sales team needs to do a little soul searching. How are the leads received from marketing? What do we do with the leads received from marketing? How quickly do we follow up leads?

At this point, many businesses decide to jump straight into CRM deployment – it would be relatively simple to map the processes into a system, and you would be ready to go immediately. But this would actually be a massive mistake. Instead of creating a better customer journey, you would simply repeat the same mistakes, albeit more quickly and efficiently.

“The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency. The second is that automation applied to an inefficient operation will magnify the inefficiency.”

[Bill Gates](#)



“50% of buyers choose the vendor that responds first.”

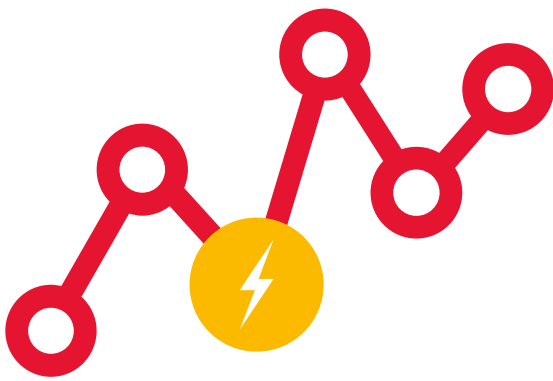
[2014 Lead Response Report –](#)
InsideSales.com

Try mapping out the processes for each business unit in flowchart form. Pretty quickly you will start to see where there are gaps and shortfalls – and these are likely to be the issues causing tension between sales and marketing.



What are the business pains?

With the existing processes mapped out, the next task is to figure out how they relate to your wider business goals – are they even capable of delivering according to the wider business strategy?



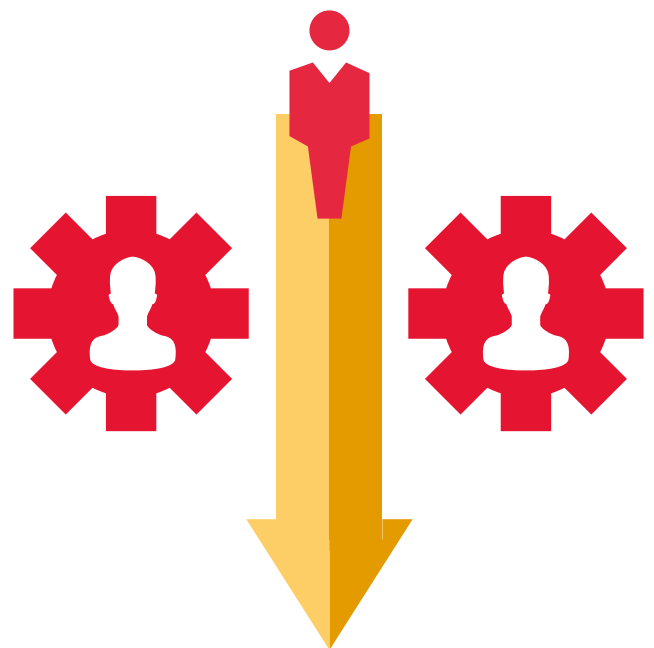
- What do your customers want?
- What is preventing you from delivering on those needs?
- How do customer needs align with commercial goals?
- What needs to be done to bring the two into synchronisation?

At this point you need to decide whether the existing customer journey can be refined, or whether you need to re-engineer from scratch. So you will need to get the sales and marketing teams together to thrash through the framework from beginning to end.

Begin mediation

The customer journey relies on sales and marketing working together, so you need to smooth any wrinkles in the relationship sooner rather than later. Ironically, the customer journey re-engineering project may be the ideal time to begin the healing process. Try having sales and marketing members “job swap” or take a short secondment so that they can see how the other the team works.

By encouraging the teams to work together to define a mutually beneficial lead generation and conversion process, you are also laying the groundwork for a productive working relationship in future.



STOP! Who is the most important?

With mediation complete, everyone can greater appreciate each other because sales know that marketing are an important business unit, and likewise, marketing understand that sales hold a great value.

If the mediation process really has ended up with this conclusion, you need to work on re - prioritising. The 'C' in CRM is the most important factor of your entire business strategy, extending far beyond sales and marketing, directly impacting long term profitability and even the future of your company. Because that 'C' stands for 'customer'.

To reap the full benefits of CRM software and ideology, you must place the customer at the heart of your operations. Over time, every single process needs to be re-engineered so that it delivers benefits to your customers. With a global marketplace at their fingertips, they will always be able to find a supplier dedicated to delivering a great customer experience if you will not.

“Successful CRM is about competing in the relationship dimension. Not as an alternative to having a competitive product or reasonable price - but as a differentiator. If your competitors are doing the same thing you are (as they generally are), product and price won't give you a long-term, sustainable competitive advantage. But if you can get an edge based on how customers feel about your company, it's a much stickier - sustainable - relationship over the long haul.”

[Bob Thompson, CustomerThink Corporation.](#)

But for reasons explained below, making marketing and sales customer-centric is the first step on the road to successful CRM implementation.



What does success look like?

By now you should know:

- Internal disagreements aside, everything is about your customers.
- What your current sales and marketing processes look like.
- Where the most blatant shortcomings and bottlenecks are.
- How existing processes match up to business strategy.
- That your sales and marketing team can understand each other if they try.
- How sales and marketing can help each other in achieving individual and team goals.

Finally you have all the resources in place to properly rebuild a customer journey that gives them satisfaction and delivers the leads and sales you need. You can finally define a lead generation/sales closure process that meets your customers' needs and delivers business revenue.

The re-engineering process needs to define questions like:

- How are incoming leads qualified and graded?
- What does a “hot” lead look like? When should it be passed to sales?
- Who is responsible for “warming” leads?
- What information needs to be supplied to customers entering the sales funnel? Who is going to follow it up?
- What are the timeframes for following up leads when they are passed from marketing to sales?

“The impact on an organisation can, at times, be subtle and distributed throughout the enterprise. Cost savings and productivity enhancements can be seen in saving a salesperson 20 minutes per week in writing activity reports, or answering four times the volume of web-based service requests in the same amount of time.”

Mary Wardley, Vice-President of IDC's CRM applications research

The new processes need to iron out the problems identified during initial fault-finding to create a seamless transition from initial enquiry, to hot lead, to closed sale. You are also well on the way to defining secondary processes such as improving customer support, or creating a repeat buying cycle using the information you capture.



Get building

Finally you are ready to begin the process of introducing CRM software into the company, as a way to enforce the new marketing/sales process. CRM implementation will take those refined processes and put them to work for your business.

Better still, several key stages of the marketing sales process can be automated to free up staff to focus on other tasks. Working with your CRM partner, you should be able to configure your software to automatically:

- Deliver inbound marketing materials to prospects, thereby sowing the seeds required to convert them into genuine leads.
- Score leads according to agreed criteria so that they are handled by the right team, at the right stage in the sales pipeline.
- Ensure that leads are transferred to sales for action at exactly the right time for action.

- Prompt the sales team into action to ensure leads are followed up in a timely manner.



Whatever your new, refined processes look like, your CRM software needs to be configured to assist.

Be realistic

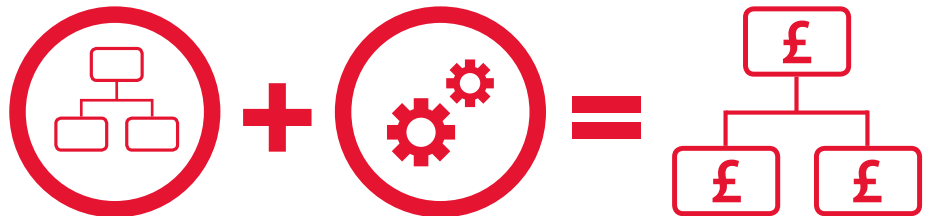
At this point, a warning is necessary. If the processes devised are not efficient, or fatally flawed, no CRM system in the world will be able to deliver the cost savings/efficiencies/benefits hoped for.

The reason that analysis, process mapping and internal discussions are so important is to avoid an “unsuccessful” CRM implementation that does not improve your customer’s experience (or your own operations).

OO + NT = EOO

“Old organization plus new technology equals expensive old organisation.”

[PriceWaterhouse Coopers’](#) internal training document.



Test, refine, test, refine, test, refine ad infinitum

No matter how much time you spend analysing and defining sales and marketing processes, they can always be improved. Shifting business priorities, new marketing channels or changing customer demands will all affect the way you work – and your processes will need to be updated to cope.

Your sales and marketing teams need to be on the look out for new problems, or the potential for new efficiencies in their day-to-day operations. These recommendations can then be built into the CRM system, tested and refined further. Just remember that every new process needs to have your customer’s interests at their core.

“The type of experience you want to deliver should be profitable to your organisation. Delivering an exceptional experience isn’t always cheap and while your experience should always be focused on the customer, it should also be focused on improving the bottom line. After you’ve identified your priorities, ensure that by elevating your customer’s experience you’ll realise additional revenue and profit.”

[Lior Arussy](#), President of customer experience specialist Strativity Group.

Sales and marketing alignment for profit

No matter how entrenched their differences, sales and marketing can be aligned for profit by:



Making customer experience the focus of everything both teams do.



Refining processes to clarify responsibilities.



Aligning sales and marketing activities with wider business strategy.



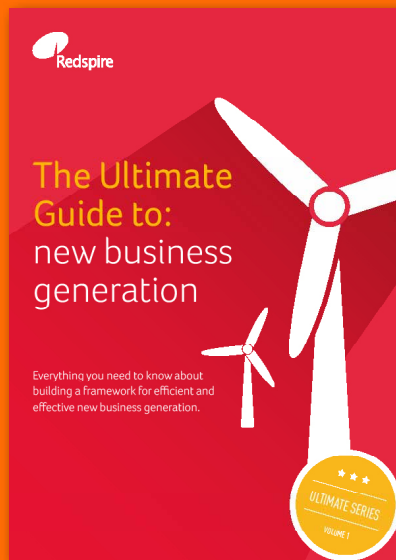
Using technology to streamline operations and automate common tasks, like grading leads and moving customers along the sales pipeline.



Constantly testing and refining processes as part of a program of continuous improvement.



Use CRM data to inform other operations throughout your business.



For more advice about using CRM for sales
and marketing success, download your
free eGuide: **The ultimate guide to: new
business generation**

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