

# From Link to Lift: Aligning Sales and Marketing to Boost Bottom-Line Impact

The struggle between sales and marketing alignment is long-standing and a common source of tension for most companies. Data shows that out-of-sync marketing and sales teams cause frustrations, lost leads and, more importantly, lost revenue opportunities.

**51% of marketers are not satisfied with the level of communication between the sales and marketing teams** – LeanData

**53% of sales professionals are not pleased with marketing's support** – LeanData

In a recent survey conducted by Launch Marketing, we discovered that:

- **Nearly 2/3 of surveyed executives cited communication breakdowns** between sales and marketing that negatively affected the company's relationship with prospects and customers.
- **Almost 70% of early-stage or rapid-growth companies expressed a need for more training** and marketing alignment with their sales teams.

## Why is lack of alignment such a big problem?

A lot of it has to do with leads—how they are qualified, how they are obtained, when they are passed on and whether or not they are worked properly. 61% of B2B marketers send all leads directly to sales, yet only 27% of those leads are qualified (MarketingSherpa). It may not matter that much though, considering sales reps ignore 50% of marketing leads (The B2B Lead), and 48% of sales reps don't trust the pipeline and revenue attribution that marketing reports (LeanData). But how is sales supposed to trust marketing when 39% of marketers don't even trust their own numbers (LeanData)?

These numbers don't paint a flattering picture, and the potential effects they could have on a company's bottom line are severe. However, it's worthwhile to put in the work to reverse these trends and bring sales and marketing into alignment. Data shows that alignment between sales and marketing significantly boosts bottom line results: companies with strong sales and marketing alignment achieve 20% annual growth rate (Aberdeen Group).



## What exactly is sales and marketing alignment?

Sales and marketing alignment refers to the shared goals, strategies and success metrics that are developed between the two teams. It encourages sales and marketing to re-envision the sales funnel to be a more collaborative revenue cycle where marketing works with sales all the way through. Strong sales and marketing alignment leverages the long-term vision and data-focused methods of marketers to support the short-term quotas and business problem-solving approach of salespeople.

There is a big divide in understanding the true value of alignment, and many companies have unintentionally built a culture that discourages alignment. From the C-Suite to the managers, there is conflict on how to prioritize sales and marketing alignment, and many choose to simply do nothing.

As you've seen, the bottom-impact of doing nothing is not favorable. For these initiatives to be successful, you need to convince management that alignment is critical and take steps to facilitate the alignment.

So how do you get buy in? Relate these efforts to revenue! The numbers speak for themselves:

- When sales and marketing teams are in sync, companies become 67% better at closing deals (Marketo)
- Organizations with tightly aligned sales and marketing functions enjoyed 36% higher customer retention and 38% higher sales win rates (MarketingProfs)
- Companies with aligned sales and marketing generated 208% more revenue from marketing (MarketingProfs)

## How do I build alignment between my sales and marketing teams?

For a company to operate efficiently and cooperatively, marketing and sales must become routine collaborators. Forward-thinking companies make alignment their ultimate goal as they know it can impact revenue greatly.

Every company's approach will be different when it comes to sales and marketing alignment, but for most, it comes back to leads. To generate a powerful opportunity engine, you must first build the LINK.

## Building the LINK

There are four key steps to build the LINK between sales and marketing:

1. Lock down definitions and qualification criteria
2. Identify standard processes
3. Normalize regular communications
4. Keep track of progress

### STEP ONE: Lock Down Definitions and Qualification Criteria

It's hard to create alignment without shared language, and it's hard to create shared language without a unified stakeholder team. In companies not aligned, it is often found that their top to bottom funnel stages have not been clearly defined and agreed upon or have become unaligned with current processes. When this happens, the sales team may be expecting certain qualifications from a lead passed on to them from marketing, while the marketer's understanding and qualifications may be different. So how should you address this issue?

**Facilitate a definitions workshop.** If you don't already have locked down definitions for the stages in your funnel or for all terms between your marketing and sales teams, create time for an all-hands-on-deck workshop and agree on shared language.

Areas where agreement should be reached include, but certainly aren't limited to:

- **Funnel stages** – What are the ideal lead and opportunity stages and what qualifies a lead for each of these stages? For example:
- **Marketing Qualified Leads (MQLs)** – What makes a good MQL? What steps should a lead have taken? What data is critical to making a lead an MQL (company name, title, phone, annual revenue, etc.)?
- **Sales Qualified Leads (SQLs)** – What makes a good SQL? What steps should a lead have taken? What data is critical to making an SQL? Should there be a step between MQL and SQL (i.e. Sales Accepted Leads/SAL)?



- **Key scoring attributes and weighting** – How should we prioritize or score leads to help identify those with the most interest? What demographic and behavioral attributes have defined qualified leads in the past?

**Don't be afraid to change the status quo.** Definitions and qualification criteria will vary slightly for each company, so ask questions and explore. When this is done, you will have buy-in and understanding from each team.

### **STEP TWO: Identify Standard Processes**

It is critical that sales and marketing work together to formally define standard processes, training and the way technology is leveraged between the teams.

**Identify what actions a lead needs to take to move from one stage to the next.** If a lead is at the top of the funnel, do you need to have their name, email and phone number? Further down in the funnel, will a lead need to have completed a demo, agreed to a meeting, confirmed BANT, etc. to move to an opportunity stage? Define exactly what needs to have happened at each stage in order for a lead to move to the next stage.

**Identify and agree on Service Level Agreements (SLAs) for each stage of the funnel.** SLAs are a great tool for smoothing the handoff from marketing to sales. How long does sales have to follow up with an MQL? How many days does sales have in opportunity stages to move a lead forward or recycle them? These SLAs need to be tightly defined and well documented so that sales can refer back to them.

**Formalize a lead notification process.** To keep sales on track, lead notifications will need to be set up to align with the SLAs. It is also important to have escalation notifications set up in the event leads aren't moving at the right pace. Sales should play an integral role in solidifying this process to ensure it is realistic and can be executed well.

**Ensure CRM processes have been defined clearly and are being followed.** The hygiene of your CRM is truly important when it comes to tracking leads, reporting and calculating ROI. Talk with sales

to identify what is working and what is not and troubleshoot areas that need improvement.

Marketing automation (MA) is your best friend in this process. With MA tools, organizations can streamline their prospect qualification and routing processes to help the sales team focus their efforts on highly-engaged and relevant leads.

### **STEP THREE: Normalize Regular Communications**

It's difficult to build and commit to growth strategies without the right people in place, and communication between teams is absolutely key. Through personalized interactions, sales can be tasked to gather critical campaign details and inform marketers about what worked best from a customer-acquisition standpoint. This additional insight is powerful, as it will help marketing better refine campaigns to boost success.

**Create regular meetings.** Whether it's weekly, monthly or bimonthly, meetings should be consistent and fit the needs of your organization. In order to keep these meetings well attended, they need to be valuable, so, when setting the frequency, make sure you will have enough content to cover.

**Formalize a standard agenda that solicits feedback from sales.** Sales needs to report back on marketing activities and successes/misses they have seen to keep this effective. Make sure to solicit feedback on campaigns, new content, sales enablement tools, etc. The goal is to continue to improve on activities to generate more leads.

**Establish key marketing communications and frequencies.** Meetings are valuable, but not realistic to communicate on every activity. Create standard updates that can be sent via email, posted on an internal site, etc. These updates can include notification to sales when new collateral or sales tools are available, campaign launches, etc.

### **STEP FOUR: Keep Track of Progress**

So now that you've gone through the exercise to properly align sales and marketing, how do you keep everyone on track?



**Identify and create standard reports.** Each measure of performance should be defined and these definitions should be socialized with all sales and marketing performance stakeholders. These reports should illustrate up-to-date results and answer key questions such as:

- Are we generating sufficient leads to meet our goals?
- How many leads are in each stage of the funnel?
- Are we converting MQLs into opportunities?

**Review reports regularly.** It is important to stay on top of activities. Review reports often and address any concerns that arise immediately. Ensure that your teams and technology can drill deeper into your metrics to confidently answer any questions as they arise.

**Make sure SLAs are being followed and take steps if they are not.** Stay ahead of slips and speak with individual sales reps when processes are not going as planned. When SLAs are not being addressed, have notifications or alerts set up and ensure management is aware. Sticking to SLAs is not only for the importance of smooth transitions between marketing and sales teams, but also for the benefit of your company's revenue.

## Assess and adjust regularly to achieve your goals

Marketing and sales alignment is not a set-it-and-forget-it-mentality. There will likely be kinks and areas that may need to be revisited. Be nimble and ready to make changes when the changes are needed. Your regularly scheduled marketing and sales alignment meetings will help identify when adjustments are necessary and keep your organization proactive. It is not only the job of marketers to pull in the desired prospects, but also the job of sales to help marketers understand their customer base and which leads have

successfully turned into clients in past interactions. A cohesive set of goals for both departments to work toward can further increase the likelihood of achieving your revenue goals.

Marketers inspire interest, while sales representatives create engaged customers. B2B marketing and sales teams working together does not change the innate differences in their jobs, but rather establishes a more efficient and united task force within the company.

### You might also be interested in...

1. [Five Steps to Optimize Your B2B Lead Generation Efforts](#)
2. [4 Ways Executives Can Tackle Common Company Growth Obstacles](#)
3. [Free Marketing Consultation](#)

