



Sales & Marketing Alignment

MORRIS CONSULTING
britaly strategic-creative boutique

PLAYBOOK: SALES AND MARKETING ALIGNMENT

TAKE THE FIRST STEP TO A PREDICTABLE PIPELINE



Is your organization tired of unforeseeable revenue hiccups and ready for a predictable pipeline instead? Then it's time to make that happen, but there's one caveat: You must first make sure you have sales and marketing alignment, where everyone is on the same team from the start. Otherwise, you will struggle to build the foundation required for that pipeline.

This playbook will help you with the first steps toward that alignment.

THE SALES AND MARKETING ALIGNMENT CHALLENGE

Sales and marketing alignment is hardly a new topic, nor is the payoff of such an alignment new knowledge. In 2015, SiriusDecisions reported that tightly aligned sales and marketing operations achieved 24% faster three-year revenue growth and 27% faster three-year profit growth. Since then, numerous statistics have been compiled proving this alignment pays off.



3-YEAR REVENUE GROWTH



3-YEAR PROFIT GROWTH

This alignment is even more critical now with today's B2B customers empowered by easy access to information that delays engagement with a salesperson.

Yet achieving that alignment is a challenge.

That's why we created this playbook with six strategies you can implement to achieve sales and marketing alignment.

“While marketing and sales use distinct funnels and pipelines, the processes involved are so closely linked that the two departments should operate in tandem even when each is led by a different manager.”

--Matt Heinz, CEO, Heinz Marketing

SIX STRATEGIES TO ALIGN SALES AND MARKETING

1. ALIGN ON TARGET AUDIENCE



To start aligning sales and marketing teams toward a common goal, you first need a common audience: your target audience.

To align on this critical first component, sales and marketing need to be in agreement about answers to questions like:

- Who is our ideal customer?
- What does our ideal customer do?
- What does our ideal customer value?
- What does our ideal customer aspire to?

Both teams will also need to agree on the data points that make up the ideal customer in these four categories:

- Company firmographics
- Employee demographics
- Account technographics
- Company psychographics



HOW TO GET THERE...

For more help defining your target audience, see [How to Create an Ideal Customer Profile](#).

2. ALIGN ON PERSONAS AND MESSAGING



Your target audience is an organization, but you're selling to a group of individuals who make up the buying committee at that organization. That means your next step is defining the personas who are typically on that committee, then agreeing on the messaging that will resonate with each member.

Personas tend to fall into one of four categories:

1. Decision Makers, either Business or Technical
2. Sponsors or Champions
3. Influencers, either Business or Technical
4. Users

As you're defining each persona, strive for alignment on how decisions are managed, who's involved, and what drives each committee member.

Next, you must agree on messaging. Due to the complexity of B2B purchasing decisions and the number of people involved in those decisions, sales and marketing must create agreed upon materials and campaigns that resonate with each member of the buying committee at each stage of the sales cycle, because each is motivated by and interested in different aspects of a solution.

HOW TO GET THERE...

For help defining the personas in your buying committee, see [How to Market and Sell to the B2B Buying Committee](#).



3. ESTABLISH A CENTRAL REPOSITORY OF CONTENT



Next, make the content based on this messaging known to and easily accessed by sales. This might seem obvious, but it's not the case within many organizations. According to Kapost, 65% of sales reps say they can't find content to send to prospects. And according to a 2018 sales and marketing alignment report, 55% of marketers don't know which assets salespeople use most.

To avoid that disconnect, develop a content repository that sales can access at every stage to get the right content, right when they need it. You'll make dramatic progress with your sales and marketing alignment when the sales reps are familiar with the content available to them—and they'll be able to request new content when they see a need for it.

4. ALIGN ON METRICS



Sales and marketing will have some metrics that differ, but when aligned, they will also have metrics they are working toward in tandem. Each team needs to know the other is being held accountable for achieving the KPIs that all have agreed upon.

Determine which metrics sales and marketing leadership need to track to determine the health of their combined efforts.

HOW TO GET THERE...

For help determining which metrics matter most to your teams, see [Secrets to Successful Sales and Marketing Metrics](#).

A successful alignment between marketing and sales starts with a mutual understanding of the target audiences, includes messaging that resonates with those audiences, is kept on track with agreed upon metrics, and is strengthened by regular meetings between marketing and sales, with everyone understanding their roles and responsibilities.

5. MEET REGULARLY



Once you're in alignment on target audiences, personas and messaging, content, and metrics, establish a cadence for regular meetings to monitor the KPIs on a regular basis and keep your sales and marketing alignment intact.

These regular meetings offer the chance for a reality check on the quality of leads. They also provide an opportunity to discuss the effectiveness of the follow-ups. When you're meeting regularly, everyone has an opportunity to:

- Know the status of key metrics and KPIs.
- Understand and adjust prospect pain points.
- Discuss which kind of messaging is resonating.
- Determine if additional content needs to be produced.
- Stay aware of the progress toward short- and long-term goals.

You can also help alignment between sales and marketing by syncing the datasets and resources used by both departments. For example, configure the pipelines and funnels that link the teams' workflows with customers' purchasing behavior, and enable the teams to use a centralized knowledge base where they draw insights from the same datasets. This synchronization will also help with regular meetings because everyone will have access to the same resources.



6. CLEARLY DEFINE ROLES AND RESPONSIBILITIES



Confusion over roles and responsibilities is one possible obstacle to a sharing of resources and the tight collaboration that leads to alignment. To avoid this:

- Clarify the roles and functions of each department from the outset.
- Set the expectations and scope for each role or function.
- Clearly define who is responsible for what on each team.
- Implement compatible success metrics and performance indicators.

For even tighter alignment, rotate jobs or cross train people from both departments to establish mutual appreciation of diverse roles and functions.

That's it for the six strategies. And now, two caveats to be aware of as you start to work toward this alignment...

TWO CAVEATS

1. ALIGNMENT MUST COME FROM THE TOP.



Organizations often contend with constantly shifting goals, changing priorities and a disconnected leadership team that doesn't realize it sends conflicting messages to its different departments. As a result, sales and marketing teams work in silos, striving for differing KPIs with an inability to prioritize budget and resources. Unless your sales and marketing alignment is coming from the top and leadership is working together on both sides, you'll struggle...and so will your bottom line.

2. ACCEPT THAT THIS WILL REQUIRE A CULTURE SHIFT.



Accept that culture changes take time even when alignment is the goal at the very top of the organization. There is a trickle-down effect, not an immediate result, especially when sales and marketing have been at odds in the past, playing the blame game and working independently of each other. True alignment does not happen at the sales kick-off. It happens via the tactics, processes and habits that connect the two groups on a daily basis.

These two caveats are not barriers to alignment, but can slow the process, so set your expectations accordingly and prepare for a gradual—rather than sudden—change. And when you implement the six strategies above, that change will happen as your sales and marketing teams move closer together, aligned to keep their eyes on the same goal: revenue.



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