

# How to align Sales and Marketing for better pipeline efficiency



## Why alignment matters

Sales and Marketing departments don't always see eye-to-eye. This occurs when the teams fail to agree on lead targets and what constitutes a "Marketing qualified" lead. Due to the lack of unified goals, mistrust arises between the departments and working relations suffer.

Evidence suggests that by aligning Sales and Marketing, businesses will see a 20 percent annual growth rate on average. For effective alignment, you need the right technology. CRM software brings transparency to the sales process – helping both teams understand which leads are converting and why.


This guide shows Sales and Marketing how to follow a joined up approach; aligning goals and mindset to improve the sales process.

## Common causes of misalignment

Causes of misalignment include:

- Failure to define a 'qualified' lead and Service Level Agreements (SLAs)
- Lack of visibility into lead conversion rates at each stage of the sales funnel
- An inability to see the marketing campaigns with which a lead has interacted

If you want to maximise the value of your Sales and Marketing efforts, it is essential to tackle each of these issues.



**Aligning sales and  
marketing will lead to a  
20% annual growth rate**

## Tips for greater alignment

Misalignment might be common, but the solution isn't hard to implement. These tips will provide a framework for Sales and Marketing to unify their approach. The result will be a reduction in tensions and increased revenue.

### STEP 1: Define your processes

The first step to alignment is coming together to decide what makes a lead valid, otherwise known as 'Marketing qualified'. Don't assume anything. If your teams are working under different assumptions of what makes a lead viable, testing your sales strategy will prove tricky.

Your discussion should focus on what Sales have discovered from their interactions with customers. What kind of behaviour do Sales see from leads that convert? How do marketing campaigns help to close sales? Once you've defined a "good lead", write it down: this will give you a base from which to create a complete Marketing and Sales playbook.

From here, you can expand your playbook, so that Sales have comprehensive guidance on how to follow up on campaigns. Your playbook should include:

- **Lead handover** – Decide how and when leads will be passed over to Sales. Also confirm the sales person who will be following up on leads by product, territory or industry.
- **Service Level Agreements (SLAs)** – To strike leads while they're hot, you'll need to outline follow-up times. The quicker a follow-up, the greater the chance of having a fruitful conversation.
- **Lead re-nurture** – If leads are lost, define when Sales will hand them back to Marketing for inclusion in nurture campaigns.

To ensure your teams learn and adopt these processes, keep your playbook short and to the point. Nobody has time to wade through dense information whilst under pressure to hit ambitious sales targets.

### STEP 2: Eliminate reward envy

It's important to tie marketing targets to your revenue goals. A Marketing team measured on lead numbers will typically focus on quantity over quality. Instead, Marketing needs to build its strategy around 'marketing influenced revenue'. Similarly to Sales, this involves connecting activities back to the revenue they generate (not the number of leads). This will mirror your organisation's targets for growth.

Likewise, you should incentivise your marketers in the same way you would your sales teams. Motivate Marketing with a rewards programme so that they're invested in the health of your pipeline. This way, Marketing will target high-quality leads, enticed by a system that rewards impact on revenue (not how much "stuff" they do).

Only  
25%  
of new  
leads  
are sales  
ready



## STEP 3: Invest in the right technology

### Unify your data with CRM

The last step is to ensure you have technology that supports your processes and measures your success. CRM software creates a transparent sales process, whereby Sales and Marketing are given a single version of the truth. This means that both teams have a view of your entire pipeline, removing gaps between expectations and results.

In addition, your CRM captures information on a lead at the start of the process and feeds it through to Sales. It will even assign the lead to a sales person based on pre-defined criteria, like product interest. This means no excuses for lost contact details or late follow-ups. It also means sales people focus on closing deals rather than wasting time manually re-entering data. With Sales and Marketing working from a single pool of data, everyone knows which leads are converting, and which aren't. Your CRM links leads to marketing campaigns, helping to identify which activity receives the best ROI. This lets Marketing make evidence-based decisions about spend, without badgering Sales for follow-up reports.

### Complement your CRM with marketing automation

Now you're ready to take your tech up a notch, by integrating marketing automation software with your CRM. Marketing automation makes it easy to implement lead nurture campaigns – gradually warming leads up before passing them to Sales.

This prevents Sales wasting time on leads who aren't ready to buy. It also helps open up conversations, with insight into the actions a lead has taken and the content they've viewed. With well nurtured leads closing faster and buying more, Sales will be eager to pick up marketing leads. As well as this, they'll have the resources to do so, as their focus shifts from a quantity of lukewarm leads to a smaller selection that are ready to buy.

Both teams will want to enjoy the full benefit of marketing automation from within your CRM. This saves time switching between systems, allowing staff to focus on their (now aligned) targets. Therefore, it's important to question how well a marketing automation tool integrates with your CRM before you invest. By integrating your Sales and Marketing infrastructure, you gain a full view of your sales funnel. This lets you answer important questions: What is the average length of your sales cycle? Where are leads failing to convert?

Guided by this insight, it's easy to evaluate your sales process. Decide where in the sales funnel leads are most likely to drop out and take steps to correct this. You'll also find that an integrated infrastructure simplifies adding new applications at a later date. This makes keeping pace with the latest advances in sales technology easy.

Companies that excel at lead nurturing generate 50% more sales ready leads at 33% lower cost.



## Repeat steps 1 to 3


Don't let yourself get complacent. It's important to review your processes, goals and software, and update them in line with business conditions. A formal review once every six months will help you to take advantage of emerging opportunities and re-think processes that are no longer fit for purpose.

The processes you'll need to revisit most often are those that rely on up-to-date feedback from Sales. For example lead scoring often needs to be amended to keep the balance between quantity and quality of leads right. Sometimes, Marketing and Sales will agree on a strict criteria for a lead to meet before it's handed over. If, however, this greatly diminishes the flow of leads, it may have to be relaxed.

## Conclusion

Better alignment helps everyone to do their jobs, improving motivation and driving results. Recognised for their contribution to revenue growth, Marketing will be more motivated. Likewise, increased commissions will motivate Sales, as they benefit from a more targeted approach. A significant motivator for both teams will be process automation. Where data management once drained people's time, they can now search for business unaffected by data-related admin.

Both teams will miss fewer opportunities with a better understanding of shared goals and which methods get results. Marketing will know which campaigns perform best and use this to inform the messaging they use, the audience they target and the offers they push. While Sales will close more deals faster, by concentrating on those leads most likely to be genuine prospects. Your business will see direct results in the health of your pipeline – all those leads that were approached prematurely will now be handled in a personal way that ensures the best chance of securing a deal.



**A 10%  
increase in  
lead quality  
results in a  
40% increase  
in sales**

## Glossary

**Customer relationship management (CRM)** – Software that tracks your interactions with existing and potential customers. This insight helps Sales and Marketing align targets and focus on profitable activities.

**Lead scoring** – A method of ranking prospective customers to determine their readiness to buy. Scoring is based on factors such as type and frequency of interactions with your business.

**Marketing automation** – Technology used by marketers to streamline campaign activity. It lets you test, measure and optimise your marketing to increase ROI.

**Marketing influenced revenue** – Money brought in from opportunities originally generated by marketing activity.

**Marketing qualified lead** – A sales-ready lead whose interest in your business has been verified by one or more marketing interactions.

**Marketing & Sales playbook** – A document that details the roles and responsibilities of your sales team. It will lay out clear objectives, the metrics used to measure success and provides a common process for closing sales.

**Nurture campaign** – The process by which leads are tracked and developed into qualified leads. These may simply involve an occasional email, or include educational content, personalised pitches and re-targeting adverts.

**Sales funnel** – A multi-stage reporting mechanism that covers the full sales cycle, from lead generation through to close of business. It's often represented visually and used to measure conversion rates at each stage of the sales process.

**Sales qualified lead** – A lead qualified by a discovery call or meeting, which typically progresses to an opportunity. This is an additional level of qualification that comes after Marketing have passed the lead onto Sales.

**Service Level Agreement (SLA)** – A formal agreement between Sales and Marketing that outlines the responsibilities undertaken by each team to reach their common goal. This will typically include numerical targets that each team has to hit, such as volume of marketing-generated leads and the speed at which Sales follow up on leads.

*Note: The statistics in this whitepaper are based on a study carried out by our OEM partner, SugarCRM, in 2015.*



### What is Access aCloud?

Access aCloud is a suite of integrated cloud-based applications developed and provided by the Access Group. We have over 10,000 UK business customers spanning various sectors, including well-known brands Publicis, Legal & General and KPMG to name but a few.

Founded in 1991, Access has over 20 years' experience in providing vertically focused industry specific software solutions. Proud recipients of 'The Sunday Times Best Companies to Work For 2016' award, our team of over 900 employees provide an outstanding service with a personal touch.

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