

Quick Start Guide

TO ALIGNING SALES & MARKETING TEAMS

Alignment between Marketing and Sales is potentially the largest opportunity for improving business performance today. When marketing and sales teams unite around a single revenue cycle, they dramatically improve marketing ROI, sales productivity, and, most importantly, top-line growth

- *Marketo*

Unfortunately, the two teams often siloed and disconnected, and the road to alignment can be bumpy. But it doesn't have to be!

Why The Disconnect?

Aligning Sales and Marketing begins with acknowledging that the two teams often have different goals and mindsets. The traditional Lead Based Marketing that most Marketing teams employ generates large quantities of "leads." On the other side of the wall, Sales is saying, "hey, thanks for the 1,000 leads, but only two are in the accounts we actually care about."

Marketing is full of activity, but Sales questions whether all of that activity actually generates revenue. Sales thinks Marketing is simple, and Marketing wonders why Sales doesn't follow up on a majority of the marketing-generated leads.

Marketing:

- Lead-Based Mindset
- Focus on leads
- Achieve marketing qualified lead (MQL) quota
- Broadcast messaging & positioning

Sales:

- Account-Based Mindset
- Focus on accounts
- Achieve revenue quota each quarter
- Build relationships with decision makers and influencers

What's The Answer?

In short, better communication and an agreed focus on accounts. If Sales and Marketing don't speak the same language, agree on the same goals, and provide each other with the information needed to succeed, then alignment won't happen.

BOTH teams must focus on what drives revenue, and to start, they have to agree on specifically what that is.

Step 1: Alignment Planning

The first step in the alignment process depends on Sales and Marketing agreeing on who their ideal customers are. The more specific you can be, the closer you get to your best-fit customers. From there, teams should collaborate to create processes and strategies for reaching prospective customers and measuring the effectiveness of these strategies.

Identify Your Ideal Customer Profile

It's vital to start the alignment process by ensuring Sales and Marketing are in agreement with your definition of the Ideal Customer Profile (ICP). To do this, you first define your Ideal Account Profile (IAP), then define your Ideal Buyer Profile (IBP). When defining your IAP, you'll consider specific account traits such as annual revenue, number of employees, industry/vertical, technologies used and location. Identifying these "best fit" accounts first and personas second is the foundation of Account Based Marketing.

$$ICP = IAP + IBP$$

*Ideal Customer Profile =
Ideal Account Profile + Ideal Buyer Profile*

Create A Sales/Marketing Playbook

A comprehensive playbook detailing target clients, sales methodology, and even specific instructions for communicating your business's value proposition and handling objections is critical to alignment success! Along the way, identify which tools Marketing will provide (collateral, demos, webinars, etc.), to support the sales process and which messaging channels are optimal. For example:

- **Email** - sent by Marketing to segmented lists of Users, Managers & Executives
- **Direct Mail** - sent by Marketing to customer Managers & Executives
- **Calls** - conducted by Sales to End-Users to provide support
- **Calls** - conducted by CEO to customer Executives to discuss increased revenue or strategic competitive advantage

Agree On Common Metrics & Collect Data

- How will you judge playbook effectiveness?
- What benchmarks need to be achieved by both Sales & Marketing each month?
- Jon Miller, CEO of Engagio, wrote a good guide on [ABM metrics](#)

Create A Service Level Agreement (SLA)

A comprehensive SLA is the culmination of your planning. Document what you've discussed and agreed on in a formal Service Level Agreement that includes:

- Shared definitions, goals, and metrics.
- How many accounts are focused on at any one time?
- A structured lead hand-off process. Who receives leads? How?
- How many leads within an account will Marketing deliver weekly?
- What is the timeframe for Sales to follow up on leads?
- How often will you review the process and determine effectiveness?

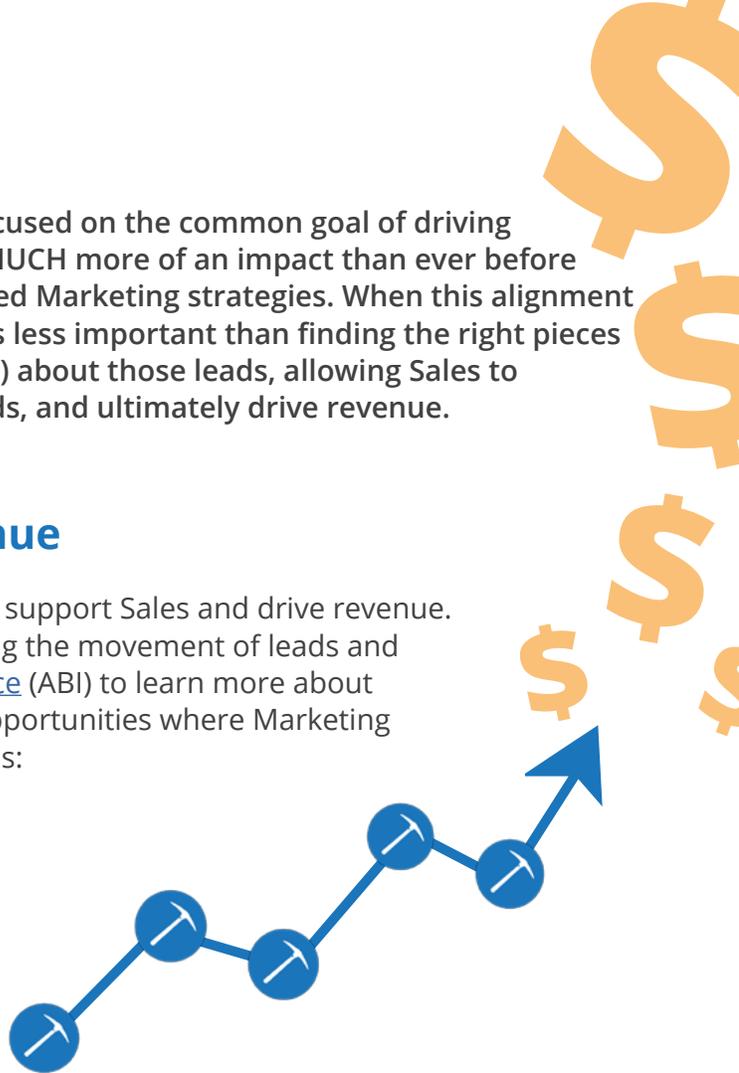
Step 2: Alignment Execution

Every single person in your organization should be focused on the common goal of driving revenue, and Marketing has an opportunity to have MUCH more of an impact than ever before by aligning with Sales and implementing Account Based Marketing strategies. When this alignment is successful, it becomes clear that quantity of leads is less important than finding the right pieces of information (also called Account Based Intelligence) about those leads, allowing Sales to penetrate target accounts, connect with the right leads, and ultimately drive revenue.

Look For Opportunities To Drive Revenue

Remember, the ultimate goal for Marketing is always to support Sales and drive revenue. Make the Sales team's job as easy as possible by tracking the movement of leads and continually acquiring valuable [Account Based Intelligence](#) (ABI) to learn more about their needs. Every detail counts. This opens up many opportunities where Marketing and Sales can work together to increase revenue such as:

- Identify trigger events
- Make renewals more consistent
- Increase account penetration
- Maximize upsell opportunities
- Discover cross-sell opportunities



Coordinated Content: Make Sales Easier

Once you've identified (and agreed upon) best-fit customers, develop content that speaks specifically to their needs.

- What is most important to them?
- What problems are they struggling with and how can **YOUR** product or solution help?
- Where do they typically get information -- email, social media, researching online, conferences?

Structure your campaigns around these answers and tailor your messaging for each of your segmented groups of leads: buyers, users, prospects, etc... Each group should receive content that speaks directly to them.



Identify Trigger Events

Trigger events are significant changes within your accounts, like when a lead leaves the company or changes their title. They are changes that likely affect the leads in your database who you've identified as influencers and decision makers - the people you want to be in front of at all times. Learning about these changes before your competitors gives you a timing advantage that allows you to approach the new contact before anyone else. And according to Founder of ShiftSelling.com, Craig Elias, [first in wins the sale up to 74% of the time.](#)

Needless to say, capitalizing on these trigger events can make a significant impact on revenue! The power to uncover these opportunities lies with your Marketing team, and the secret to doing so is actually quite simple:

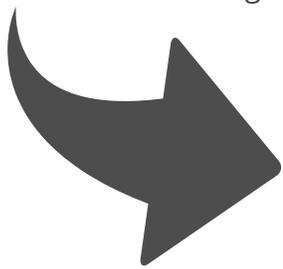
All you have to do is review your email campaign replies.

By doing so, you will uncover a wealth of ABI that results in new and enhanced leads, and you will discover timely trigger events that your Sales team can move on, fast!

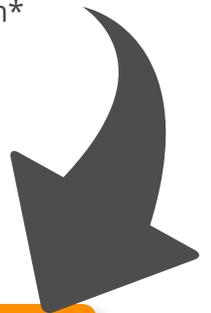
Use An Automated Solution To Mine Email Campaign Replies

If your email campaigns are large and your resources light, it may be unrealistic to manually analyze each reply that comes in. Another solution is to utilize an automated web-based service like [LeadGnome](#), which:

- Eliminates time-consuming, error-prone, and costly manual process
- Performs lead-to-account matching - a fundamental ABM capability
- Drives revenue by generating 36% more net new leads*
- Enhances 72% of the existing leads in your database with new/updated information*
- Accelerates sales by identifying trigger events
- Protects brand and customer sentiment by handling "opt out" replies
- Delivers high ROI



[Download Your Free ABI eBook](#)



Step 3: Alignment Course Corrections

- The logical final step to any major strategy change is a continuous feedback loop and plan for course corrections. Even the most well planned ABM strategy can have hiccups once implemented, and that's ok! The important thing is that you have a process in place for correcting your strategy that includes:
 - Regular meetings to review goals.
 - Have Marketing observe sales pitches to see content in action
 - Consistent schedule of updates so all teams are "in the loop."
 - Flexibility to adjust campaigns as necessary.