



How to Overcome
SALES AND MARKETING
MISALIGNMENT

INTRODUCTION

Sales and marketing misalignment plagues most organizations. We've all been there. Sales complains that marketing doesn't send over good leads and marketing complains that sales never follows up with their leads. Like two bickering spouses, it seems like we can't just get along!

According to research by Marketo and Reachforce, half of sales reps' time is spent on unproductive prospecting, with sales ignoring as much as 80% of marketing leads. Sound familiar? 80% is a lot of time and effort being ignored.

Where does this lack of alignment come from? In many cases, it seems like both teams are after different objectives—marketing is often goaled on more leads and sales is goaled on closed-won revenue.

Although it may seem like sales and marketing teams have different objectives, in the end, their goal is the same—to *increase conversions*

and revenue. No matter how you slice it—both sales and marketing must work together to grow the business.

For modern sales and marketing teams to be effective in today's buyer landscape, alignment is critical. The sales funnel is now a single system; where sales and marketing teams work in tandem to guide prospects to a buying decision. Gone are the days when a sales development rep could pick up the phone, call a cold lead, and expect to book a meeting. Sure, this happens once in a blue moon, but... it's not the common outcome.



Buyers want to do their own information gathering—they're self-educating and self-selecting before they even make their way to your sales reps. In a recent survey, Forrester found that 74% of business buyers conduct more than half of their research online before making a purchase.

Because of your buyers' self reliance, sales teams have to depend more on marketing than ever before. Marketing is now tasked with educating the buyer and bringing in net-new quality leads—pushing those leads further and further into the sales funnel.

And if you and your sales team are not on the same page, this misalignment could be causing major inefficiencies in your business.

Well, we're here to get you back on track so you can be a *united revenue team*. If sales and marketing is in lock-step together, you can close more business and celebrate more wins—together!



In This Ebook We Will Cover:

- How to spot the symptoms of bad sales and marketing alignment
- Tactics for becoming an aligned revenue team
- How to structure your revenue team for alignment
- How to maintain improvements in your relationship

HOW TO SPOT THE SYMPTOMS OF BAD SALES AND MARKETING ALIGNMENT

If you have good sales and marketing alignment, then your sales and marketing teams are working hand-in-hand as a single revenue team towards the same goals.

When your sales and marketing teams are aligned, you can more effectively drive revenue and grow your business. According to a Marketo study, *alignment extracts 208% more value from marketing with 108% less friction*. Sounds like a dream right?!

Without alignment, both sales and marketing end up impeding each other's and your organization's success. Lack of alignment

results in a disjointed buyer journey, losing track of leads when they're hot for your business, and wasting time and effort for sales reps and marketing team members.

Let's go into some of the ways you can spot sales and marketing misalignment in your organization. Once spotted and assessed, you can start repairing the relationship in order to build a cohesive customer journey that converts.



Symptom #1

YOUR SALES TEAM SPEAKS IN ACCOUNTS AND YOU SPEAK IN LEADS

The number one symptom of sales and marketing misalignment is that your teams are speaking in different languages. Marketing speaks about capturing *leads*, while sales talks about closing *accounts*.

Most marketing departments are lead focused because their efforts have been driven by marketing automation. And marketing automation advocates for lead acquisition, lead nurturing, lead scoring, and so on.

Let's take a look at traditional lead scoring, since lead scoring can be considered a key pillar in sales and marketing alignment. Lead scoring measures a prospect's

engagement with your brand—a lead attended a webinar, downloaded an ebook, or spent time on your pricing page.

In traditional marketing automation platforms, once a lead hits a particular score—she gets sent over to your sales team. But traditional lead scoring only looks at engagement—since engagement is measured on an individual level.





But, what about fit? How are you measuring whether or not the prospect comes from a company that is a *good fit* for your business? And since your sales team cares about accounts, they will most certainly care whether or not a lead comes from a company that is a good fit for your business.

For example, without looking at what company a lead belongs to, you end up sending leads

over to sales that are not a good fit for your business. So that high scoring lead you just sent to your sales team could be a student, a competitor, or someone from a company outside of the industries that you sell to if you are not currently looking at account fit and data.

And that, my friends, is a huge fundamental difference. If your marketing team is not thinking in terms of accounts, then sales is

going to lose confidence in the leads that marketing sends over.

The bottom line is that sales and marketing need to start speaking the same language — and speaking in "accounts" is a fantastic place to start.



Symptom #2

YOUR *MARKETING* TEAM IS CONSTANTLY UPSET WITH YOUR SALES TEAM

As marketers, you spend every day coming up with creative ways to generate leads and execute programs. When sales rarely follows-up with the leads you painstakingly generate day-in-and-day-out, it is extremely frustrating. Trust us—we feel your pain.

If you find yourself in this situation—think taking 10 deep breaths every time you speak to a sales rep about lead follow-up—that's a clear sign that something is not quite right with your sales and marketing relationship.

Time for a marriage counselor.

Symptom #3

YOUR SALES TEAM IS CONSTANTLY UPSET WITH YOUR MARKETING TEAM

On the flip side, maybe someone from sales comes over to tell you that while the webinar you put on was awesome from a content perspective, and you got upwards of a thousand leads, it didn't attract the *right* leads.

The webinar you hosted and promoted may have been successful from a marketing perspective, but not from a sales perspective. The leads from the webinar were largely from accounts that are not a good fit for your business. This is a huge blow.

You are frustrated. They are frustrated.

While there are some different short-term goals for each team, the long term goal for each team is closing new business—therefore, your webinar was not a success in the eyes of sales.

If this sounds familiar, you are probably suffering from sales and marketing misalignment.





Symptom #4

YOUR SALES AND MARKETING TEAMS ARE OPERATING IN SILOS

Whether its physically on opposite sides of an office, or digitally through your workspaces and workflows, if you are operating in silos, that's usually a sign that your sales and marketing relationship has some gaps.

Physical Silos

You can get a good sense for how aligned your revenue organization is by how your office is set up. If marketing and sales sit nowhere near each other, then you most likely have a problem.

Organizations with aligned revenue teams have sales and marketing teams sitting in close proximity to one another. When the two teams sit together, they can have natural

conversations about what's going on in your funnel. Sales can ask questions about your latest content or email programs, and the two teams get to laugh at the same jokes and get to know one another.

Sales and marketing teams shouldn't have to walk across the office, or worse, into a different building to have conversations—this just creates barriers to building relationships.

PHYSICAL SILOS

In addition to seating arrangements, consider including one (or more) of your Sales Directors in your regular marketing meetings and vice versa. While each team leader doesn't have to be updated on the day-to-day activities of the team, they should be regularly updated on the progress of lead generating initiatives.

For instance, marketing needs to know within the same week if inbound lead conversions are going down, not after months of poor lead performance. And sales needs to know in advance when events are happening, assets are publishing, and when they can expect a flurry of inbound leads.

Digital Silos

In addition to breaking down physical silos, you must also break down digital silos. The leaders of your sales and marketing teams must work together, in at least one technology platform, where you can share dashboards and look at the same reports. For many teams, the place that sales and marketing digitally overlap is in a CRM tool, like Salesforce.

Someone on your marketing team must have an intimate understanding of your CRM. She must be



able to create and monitor dashboards in that system to understand what is working and what isn't from a holistic revenue team perspective. This is typically your Director of Demand Generation or Marketing Operations.

If the marketing team is only looking at reports within their marketing automation software, and the sales team is only looking at reports in their CRM, there is going to be a disconnect.

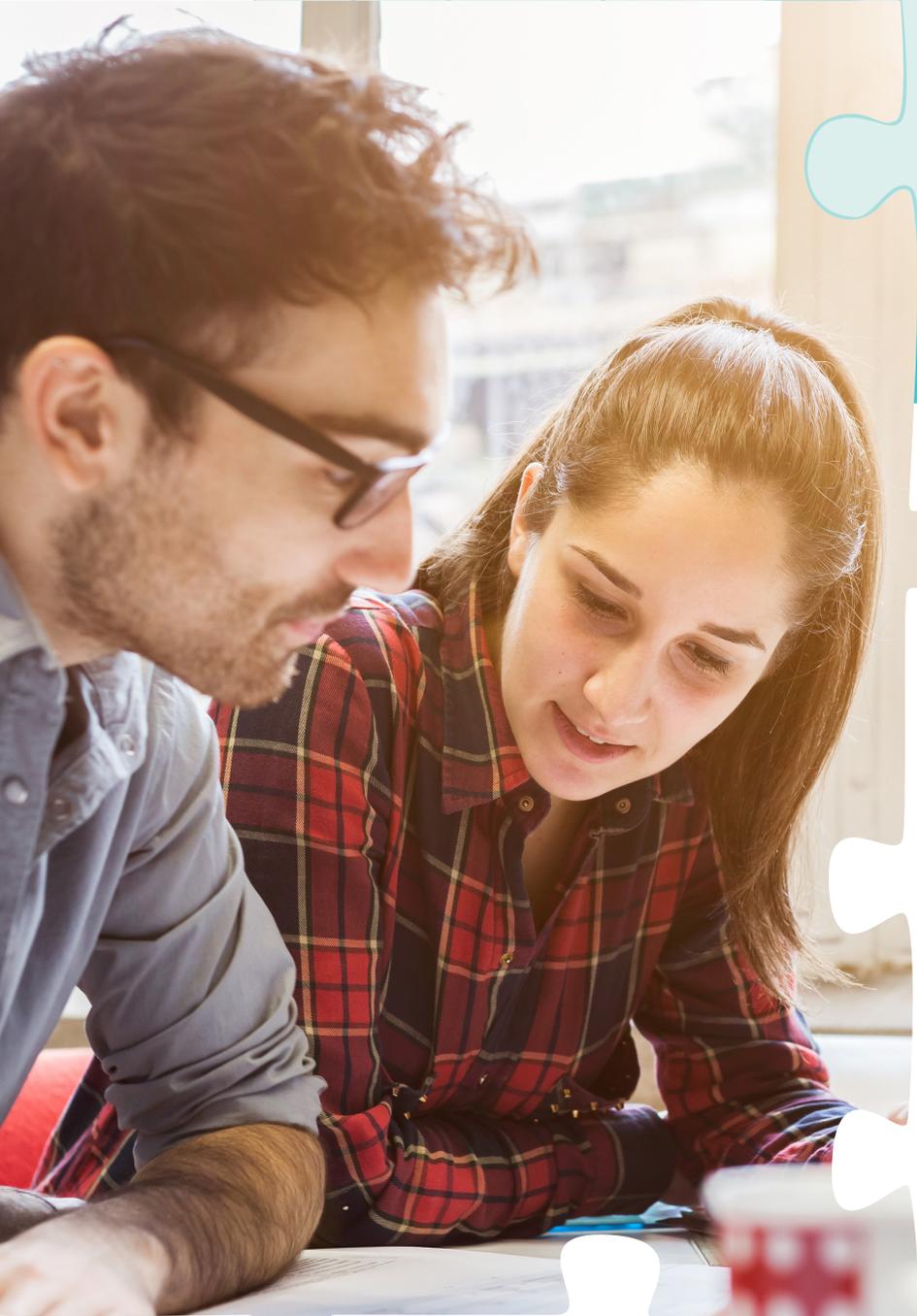
Picture this: your teams walk into a board meeting and marketing says, "we're doing awesome!!" and sales says, "we haven't closed anything in two months". Marketing is not successful unless the sales team is successful.

Closed deals should be the ultimate measure of when your system is working and when it isn't. Use joint reporting to keep up on the details.

TACTICS FOR BECOMING AN ALIGNED REVENUE TEAM

Now that we've explained how to spot sales and marketing misalignment it's time to look at what you can do to *repair* the relationship—so you and your sales team can start looking like one single aligned team working toward the same goal.





Tactic #1

GAIN CONSENSUS ON IMPORTANT DEFINITIONS

There are a few concepts and measurements that should be consistent across the revenue team. From sales to marketing, the revenue team should agree on the definitions of qualified leads.

Even if you are using account-based terminology and measurements, the handoff from marketing to sales is still on an individual lead basis. Therefore, you need to have your definitions straight and your handoff rules decided.

Defining Qualified Leads

The very first thing you should do is to get in a room and make sure you and your sales counterparts

have clear definitions of both a Marketing Qualified Lead (MQL) and a Sales Qualified Lead (SQL). Without a clear understanding of these definitions, you will inevitably be out of sync.

For example, you probably define a MQL as a lead that is ready to be passed off to sales and a SQL as a lead that has been vetted by inside sales and is ready to be handed off to an Account Executive

to close the deal. But what exactly about that MQL makes it ready for sales, and does sales agree? What factors make up a SQL? Are they similar to those that make up a MQL?

Some organizations define a lead purely based on engagement, which can be determined by lead scoring, while others will use some form of basic fit requirements based on demographic and firmographic information like company size and revenue. Whatever works best for your organization, we recommend using some kind scoring threshold.

Predictive Scoring

We believe that predictive scoring is the best mechanism for sales

and marketing alignment when it comes to determining your lead definitions (OK, yes we are biased, but your data doesn't lie!).

Before we move forward, let's pause to understand why predictive scoring can be the defining factor in your MQL and SQL thresholds and why it can be such a game changer for sales and marketing alignment.

Predictive scoring, a feature of your predictive marketing platform, leverages your internal data and external data signals, to score incoming prospects based on how closely they resemble your best customer. In other words, instead of the rules-based system of traditional scoring, predictive



scoring looks at data to determine if a prospect is a good fit for your business.

Predictive scoring can alleviate misalignment caused by lead definitions and score thresholds. Instead of both teams meeting to come up with a lead definition and

score threshold based on their best guesses, predictive marketing provides data-backed insight into a) what makes up a good lead and b) when sales should call incoming leads. This alignment can occur through the insight and prioritization capabilities of a predictive model.



The data a predictive marketing platform collects spans signals across fit (demographic, firmographic, and technographic data), engagement with your company website, and intent to purchase data that is sourced across the web. That data is then used to determine your total addressable market (TAM) and the probability of future sales.

The model is created within your predictive marketing platform and the data gets distributed to your

marketing automation and CRM tools in the form of a score so you can employ the insights in your day-to-day decision making. Additionally, if you are using EverString's platform, predictive scoring enables your marketing team to be account-based (more on that in the next section) to further increase alignment.

With data-backed insights from predictive scoring, your sales and marketing teams know who to focus their time on.



Tactic #2

SPEAK IN TERMS OF ACCOUNTS, NOT JUST LEADS

In the spirit of speaking the same language, both marketing and sales should speak in terms of *accounts*.

Think about it, as B2B marketers, we know it's called 'business-to-business' not 'business-to-lead'. In B2B, you're never just selling to one individual, you are selling into an account where there are many buyers involved in a purchase decision. Your sales team knows this and so should you.

Jon Miller, Co-Founder of Marketo and CEO of Engagio, an Account-Based Marketing platform, reminds us that sales people never talk about how many leads they've

closed. They talk about how many accounts they've closed. The more marketing becomes an extension of sales, the more crucial it is that marketing adopts an account-based approach.

That's not to say leads aren't important—after all, you are still speaking to people. Plus, each account is made up of a number of buyers, if one of those leads is engaging with your brand, your chances of that account buying your business increases.

Create an Account Based-Marketing Strategy

The first step to looking through an account-based lens is adopting a target account approach to your marketing.

Account-Based Marketing is a strategic approach to creating relationships with your target accounts. Account-Based Marketing requires a coordinated effort between sales and marketing teams to create a personalized experience in order to open doors and deepen engagement at target accounts—thereby creating natural sales and marketing alignment.

In contrast to traditional demand generation efforts that use a wide top-of-funnel to attract a high quantity of leads, ABM is very focused—you determine key accounts and target those accounts with a series of marketing programs. It's a more proactive approach than traditional demand generation. Instead of waiting for buyers to find you and engage with your content, you go out and find them! Much more conducive to sales and marketing alignment—don't you think?



FROM THE INITIAL ACCOUNT SELECTION, ALL THE WAY THROUGH THE BUYER JOURNEY, SALES AND MARKETING TEAMS MUST WORK TOGETHER TO ACHIEVE AN ACCOUNT BASED APPROACH.

Target Account Selection

Account selection is the process of aligning sales and marketing teams around a list of target accounts and existing customers that are most likely to deliver revenue. You can't have an account-based approach without accounts right?!

There are a few ways to do account selection:

- You and your sales team can get into a room and decide which accounts to go after based on intuition and experience.
- You and your sales team can look at your engagement scoring and other data within your marketing automation platform to decide who to go after
- You can turn to a predictive marketing platform to provide advanced analytics and modeling, so your data can provide you with an objective view of your target accounts

While you can certainly start with a more basic approach to account selection, by leveraging data in a predictive platform, you have a true, data-backed approach to determining which target accounts to go after. In other words, the more data you bring in, and the more sophisticated your account selection is, the more likely it is that you are focusing your efforts on the accounts with the highest propensity to buy.

Predictive marketing provides you with a point-of-view on the entire market. Because when

predictive combines your data with external data, you get insight into data patterns that you may never have previously considered. This insight helps you fill your funnel with new target accounts that you may never have thought to include—and prioritize the right accounts currently in your database.

By both providing your sales team with high-quality target accounts to pursue, and creating programs around developing those relationships, you can greatly reduce the friction between you and your sales team.





Orchestrating A Coordinated Approach

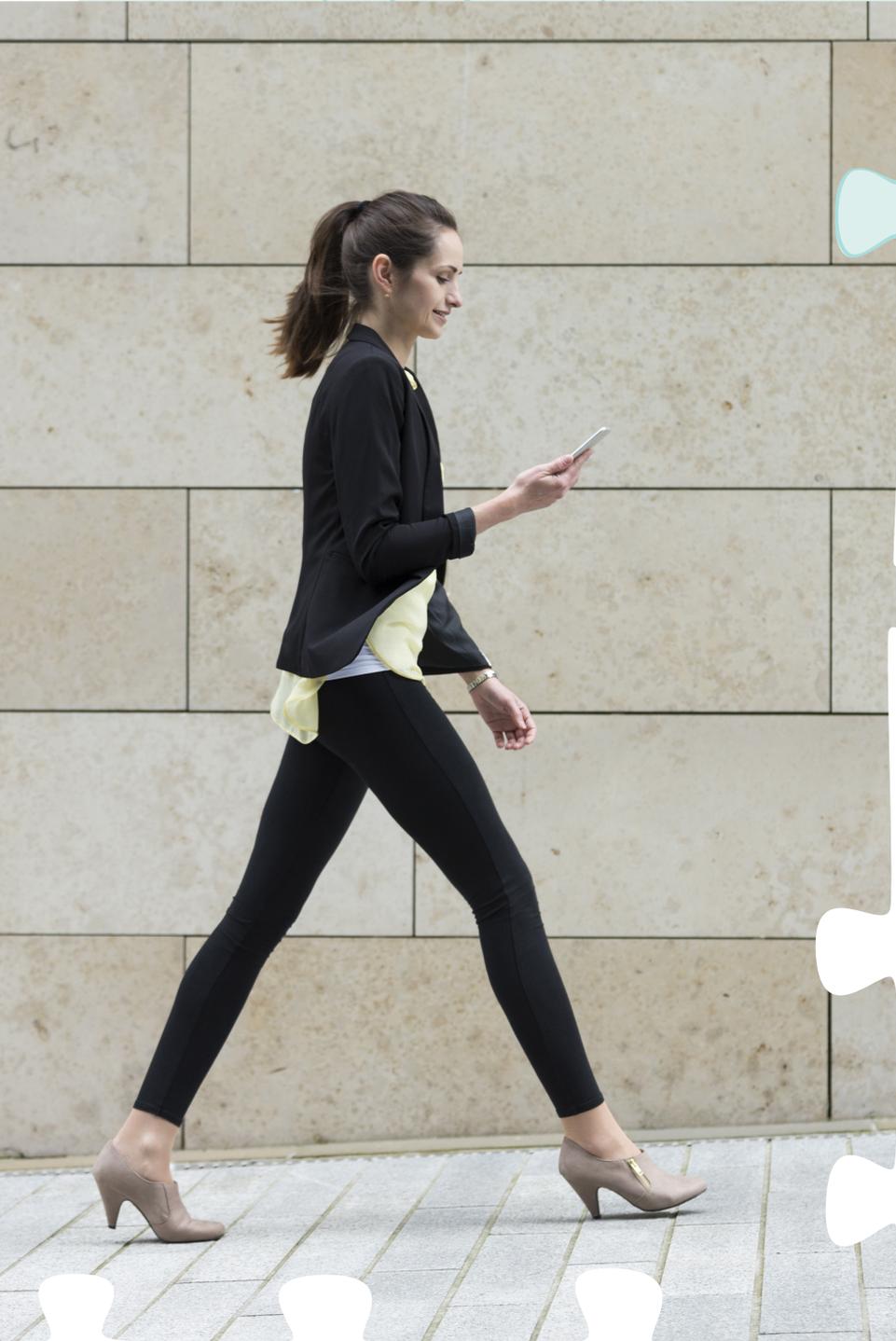
Once you've decided on your target accounts, it's time for you and your sales team to come up with some well-rounded targeted plays. How can you play off of each other's strengths to help move an account through the buyer journey? Let's think through an example.

- **Setup:** Your sales reps do research into an account to identify the key decision makers in a sales cycle. They estimate there are five key players and do some digging on their professional social media profiles to learn about each decision maker. They then pass this insight to marketing.
- **Open the Door:** Marketing creates content with this intel in mind, or creates a branded content hub with your existing content that relates to your target account. Maybe you

even send a unique direct mail piece featuring your content. Your sales reps also send your account personal 1:1 communication.

- **Moving Through the Funnel:** Take executives from the account to a sporting event or dinner with a master chef—something unique and original. Use conversations your sales reps have had with these individuals, or leverage information from their social profiles to decide what would be appealing. Create targeted ads and start targeting them online and on their social profiles.

As you can see from this brief example, with ABM, sales and marketing teams align to create a unique and cohesive buyer journey for target accounts. Consider trying this approach in your organization!



Tactic #3

STRUCTURE YOUR REVENUE TEAM FOR ALIGNMENT

Defining the structure of your revenue team is essential for the success of your alignment initiatives. This means outlining the roles of your sales and marketing teams so each person takes responsibility for their part in moving the buyer through the funnel.

There are a few roles that we suggest you have in place to get your sales and marketing teams to unite toward a common goal.

Director of Demand Generation

The Director of Demand Generation should have regular meetings with sales leadership

outside of your regular marketing meetings in order to stay up-to-date on the sales side of the house. Your Director of Demand Generation should help create reports within your CRM and marketing automation platforms to clearly show the progress of your marketing team.

DIRECTOR OF DEMAND GENERATION

This person orchestrates segmentation within your marketing automation platform, plans email programs, distributes content via paid programs and content syndication, and manages events and online advertising. She will also work to implement your predictive marketing platform.

While your Director of Sales Development manages relationships further in the funnel, your Director of Demand Gen is responsible for that first touch experience, whether its by email, advertising, or at an event. Her goal is to create brand awareness and get leads into your sales funnel. She also works to build relationships with accounts and leads through the buying process.

If you are implementing an ABM strategy, your Director of Demand Generation will work closely with your sales team to determine target account selection and program outreach to your target accounts.

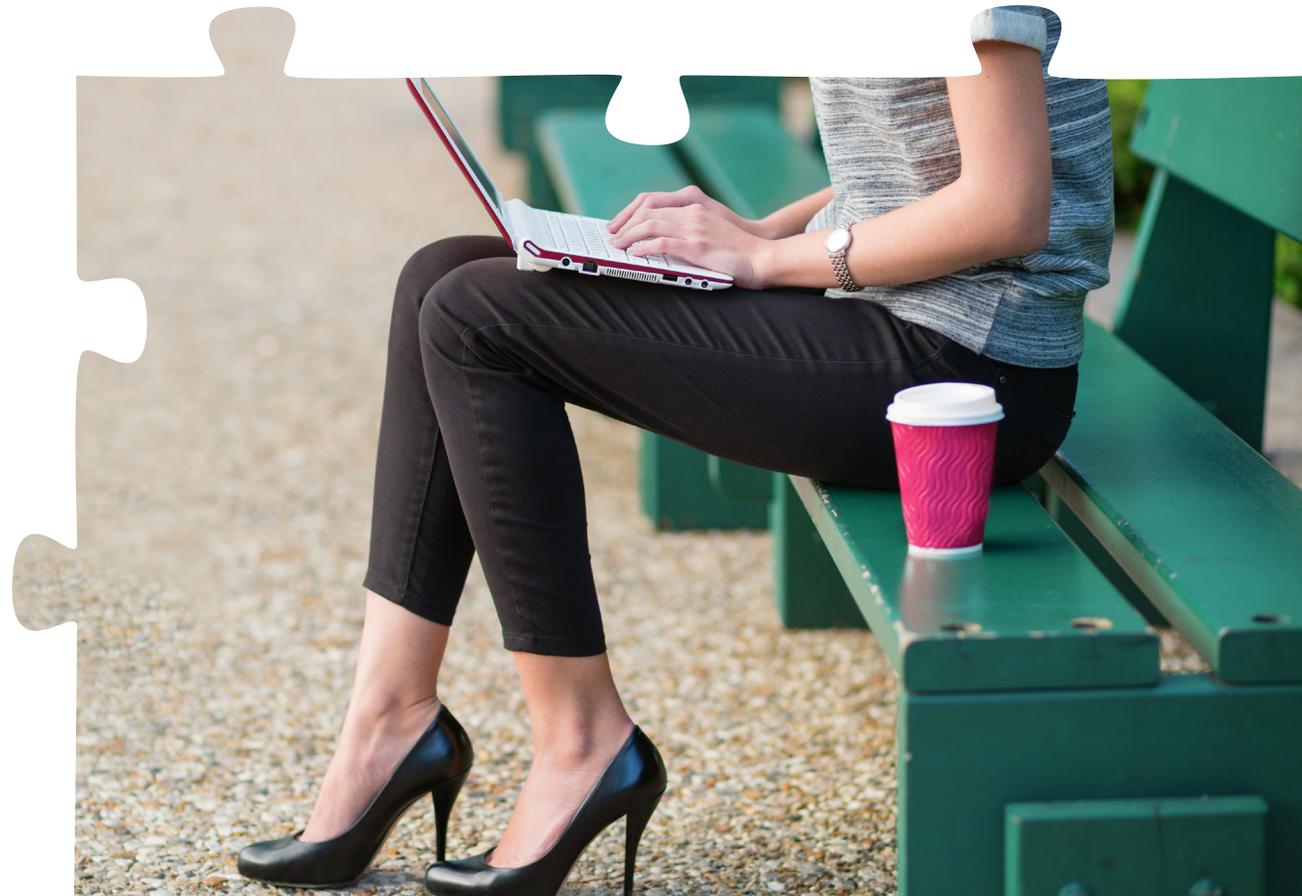
Director of Sales Development

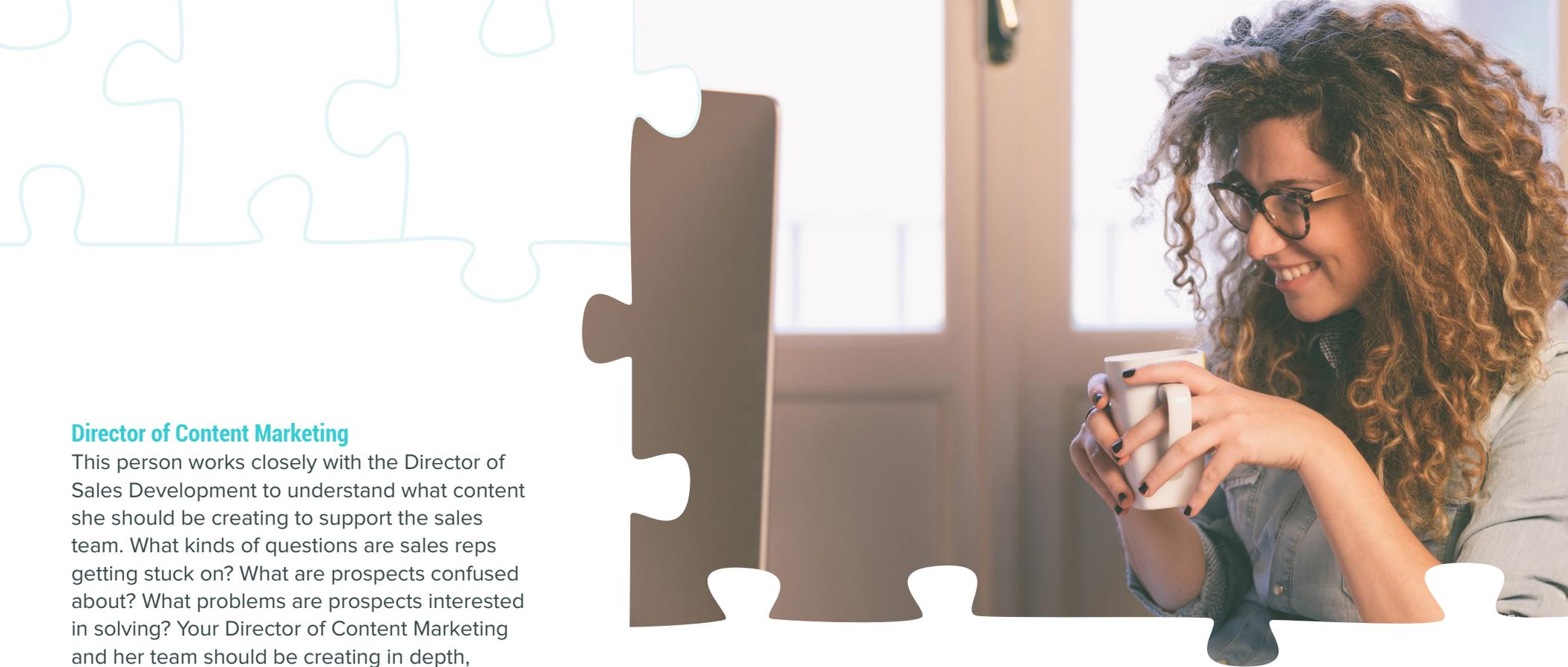
Your Director of Sales Development should be your connection to the sales reps. He should provide you with updates on conversion rates, how marketing's programs are being received, and any issues that he see's with your funnel. He should be in your regular marketing meetings to stay up-to-date on your progress

and to update you on his teams' progress. He ensures that the sales reps are following up with your leads in a timely manner, and that your team stays in the loop.

This person rallies your Sales Development Reps (SDRs), determines cadence of follow up, and keeps SDRs excited and driven. He manages the handoff from marketing,

and then again from the SDRs to the Account Executives. The Director of Sales Development is responsible for managing the relationship at the middle- or bottom-of-the-funnel. He ensures the prospect is getting the attention she needs from the right people in the business once she gets warmer to the idea of talking to sales. Your Director of Sales Development's goal is to deliver a warm, good-fit lead to an Account Executive.





Director of Content Marketing

This person works closely with the Director of Sales Development to understand what content she should be creating to support the sales team. What kinds of questions are sales reps getting stuck on? What are prospects confused about? What problems are prospects interested in solving? Your Director of Content Marketing and her team should be creating in depth, creative answers to these questions.

This person creates quality content to guide buyers through the funnel. She creates content that both gets prospects into your funnel and moves them through your funnel to become warm MQLs.

Creating content that helps your sales reps have more intelligent conversations with your prospects helps to increase sales and marketing alignment and deepen that relationship. Additionally, if you are engaged in ABM, your Director of Content is responsible for creating highly curated and relevant content for target accounts.

Sales Development Representatives

This is your inbound and outbound Sales Development team. They review, call, and email all of the MQLs you send over. If an SDR feels a lead is ready to become a potential customer, he works to convince that prospect to take a meeting with an Account Executive.

SDRs work closely with the Directors on your marketing team to determine how to follow up with leads—whether it's deciding what content to send a prospect or follow-up cadence, your SDRs are typically the first in-person experience a prospect has with your brand.

Account Executives

Account Executives close deals. They should be armed with all of the intel from the customer's journey through your funnel—what content she read, what she said in conversations with your SDRs, and how she responded to various programs. This information will help your Account Executives be successful in bringing in the deal for a close.

AEs help leads turn from prospects to customers. They manage the transition out of the sales funnel and into your customer cycle.



Tactic #4

COMMIT TO CONSISTENT IMPROVEMENT

It's great to meet initially to determine goals, maybe initiate an Account-based Marketing strategy, and define your roles, but many organizations end up falling back into the same old patterns.

There are many steps both sales and marketing can take to help ensure that alignment is easy and remains top-of-mind for each team.

What Marketing Can Do

Each team has to focus on ongoing improvement when it comes to sales and marketing alignment. Here are steps that

marketing can do to improve the relationship between the two teams:

Data Hygiene

Data hygiene is important for all aspects of sales and marketing alignment. No sales rep wants a junk lead! If marketing spends time to improve data, then sales won't have to spend time

WHAT CAN MARKETING DO

researching contact information, only to find that the lead is a poor fit in the first place. Data hygiene is also incredibly important if you are planning on implementing a predictive marketing solution.

Train Sales

You need to make sure that your sales team understands your funnel stage definitions, when to reach out to a lead, and what to say to that lead. This can only happen with training. Train your sales team on where they can find a new Marketing Qualified Lead (MQL) and what messaging they should use to reach out to that lead. Also train sales on what they should do with the MQL in different situations. Show them how to reject leads, and make this as easy as possible.

Create Lead Alerts

Make sure all of your leads get touched by sales in the proper amount of time. Set up an SLA (service level agreement) with you and your sales team that says a lead has to be followed up with in a certain amount of time. If a sales rep does not follow up with that lead in the appropriate timeframe, an email will be sent to his manager. If the lead still remains untouched an email goes to the VP, and then to the CEO. This ensures proper follow-up.





What Sales Can Do

It's not just the responsibility of marketing to ensure that sales and marketing remain aligned, sales also needs to do their part. Here are the steps that sales can do to improve the relationship between the two teams:

Follow Marketing's Protocol for Leads

Instead of following their own process, sales needs to follow the process that marketing has laid out for lead follow-up and lead recycling. Sales should make sure that they fill out the right fields in the CRM and follow the right protocols.

Follow Marketing's Lead on Messaging

Marketing knows what message resonates with the target audience, so your sales team should always follow marketing's lead when it comes to messaging. Whether it is messaging in emails, calls, or social interactions, sales reps should always echo what marketing is putting out into the market.

Use the Content Marketing Creates

Marketing spends lots of time creating valuable content that educates your target audience and addresses pain points. Your sales team should use this content in their sales cycles so that they can more effectively speak to your audience.

Communicate Back

If your sales teams don't tell you what they are hearing on the phone, you can never include that valuable feedback into your marketing and messaging. Your sales team can be extremely helpful by telling you what they hear in sales calls. What are the objections? What are the common pain points? How are prospect's receiving the product? And so on.

CONCLUSION

The modern sales funnel is more demanding, and as a result, sales and marketing alignment is more important than ever before. A buyer journey is now a single system where sales and marketing teams work in tandem to guide prospects to a buying decision.

Yet all too often, sales and marketing misalignment plagues B2B organizations. Don't let this be you!

The first step to solving any problem is recognizing it exists! Look for the symptoms of bad sales and marketing alignment in your organization. From there, sales and marketing alignment is all about getting on the same page. It requires a joint effort to define definitions and metrics of your qualified leads and accounts.

If you're committed to creating an aligned revenue team, make sure each of the roles on your sales and marketing teams are defined. Each person should know their role in driving leads through the pipeline, while maintaining alignment.

And finally, never think the work is done. The more aligned your revenue team gets, the more natural this work will become--but continue to look for ways to smooth out your buyer journey and stay up to date with the state of your pipeline.

When you've become an aligned revenue team that coordinates your effort across every sales cycle, you start getting shared wins. For each deal that comes in, you can ring the gong or pop that champagne bottle to celebrate the great job that both sales and marketing did in winning that six figure deal.

SO GET ALIGNED, POP THOSE BOTTLES, *GET THOSE WINS!*



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