



BETTER TOGETHER

# The Ultimate Marketing and Sales Alignment Handbook



## FOR YEARS, YOUR COMPANY'S SALES AND MARKETING TEAMS HAVE WORKED TOGETHER — YET SEPARATELY.

Both teams strive to bring in new leads and turn those leads into returning, loyal customers. But despite having the same common goal, each department tends to have their own opinions on what tactics and collateral should be used to attract and warm up leads.

In order to facilitate a level of collaboration that turns into increased revenue, your sales and marketing functions must be aligned. When these two teams are united, the possibilities for your organization's success are endless.

# Marketing & Sales Teams = One Revenue Team

We've already established that both your marketing and sales teams have the same goals in mind when it comes to your business: to increase leads, convert to sales, and boost revenue. When there's misalignment in the way these two departments interact, however, the consequences can be disastrous and [cost the business significantly](#).

For example, your marketing team may work hard to put together content to attract and convert leads. But if your sales team doesn't consider the materials relevant to the customer journey, they may never leverage them. In turn, you'll have a marketing team whose time and energy is wasted, and a sales team that doesn't have the collateral it needs to do their job.

And the issues don't just stop there. A [HubSpot study](#) estimates that around 79% of marketing leads never convert due to a failure to nurture from both the sales and marketing departments. That's a massive loss for the company over time.

The easiest way to align marketing and sales is to make both groups accountable for the same business goal: **REVENUE**. But how do you get both of your teams to focus on this common goal in the same way? It all begins with a little bit of collaboration right from the start.

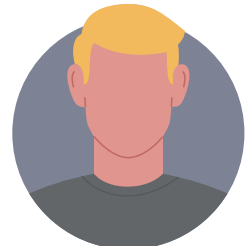
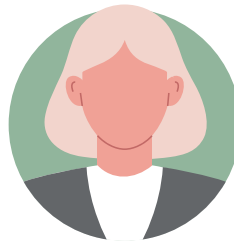
# Collaborating to Create Your Buyer Personas

To develop your ideal buyer personas, ask your sales team to record their next 10 to 20 demos and share those with you. Watch each one and see what your prospects are drawn to based on the questions they ask and their level of interest during each part.

Here are examples of Information you should gather about your buyers:

- What industry they're in
- Their role within their organization
- If they're a decision maker or not
- Their background or demographic
- What challenges they face that lead them to your business
- How your value proposition speaks to your them
- Why this person should be reaching out to you now for a solution

You can even hop on a call with five to 10 customers and ask them to show you how they use your product, service, or platform. Where do they spend most of their time regarding your solution? What do they absolutely love because it makes their job easier?



By creating a set of buyer personas that BOTH sales and marketing agree upon, you begin to reap the benefits that come with having a unified concept of what your buyer looks like and how they typically behave during their purchasing journey.

Together, your sales and marketing departments will gain a better understanding of your ideal customer so they can prioritize leads and move buyers down the sales funnel more efficiently and effectively.

# Documenting a Single Buyer Journey

As a business, one of the most important questions to ask yourself is this: Who exactly are we marketing and selling to?

You're likely to receive different answers from your marketing and sales teams because they are going to be viewing things from their respective business function lens. This can cause issues over time.

## HOW MARKETING VIEWS THE BUYING PROCESS

Determining what the path is for customers to buy is often viewed as a simple, three-stage process by marketing teams.

There's a lead that starts in the **Awareness Stage**, where the buyer realizes they have a problem. From there, they move into the **Consideration Stage**, as they define what their exact problem is and conduct some research as to what options there are to solve it. It all ends at the **Decision Stage**, where the buyer finds the solution they're looking for and purchases it.



But that's not exactly how the sales department sees things.

## HOW SALES VIEWS THE BUYING PROCESS

The sales team sees the buyer journey as involving a few more complex steps.



The first step is the **Prospecting Stage**, where leads discover that your business exists through sales and marketing activities. Then, any viable leads move into the **Lead Qualification Stage**, where both teams use a variety of methods to determine if the leads are qualified. The next step is to offer a **Demonstration** or meeting to introduce your solution more in-depth.

If all goes well, the lead will move into the **Proposal Stage**, followed shortly after by the **Negotiation Stage** where pricing, scope of work, and managing expectations are all discussed before coming to a solid agreement. Then, the opportunity is considered won once the deal has been closed and the customer is fully onboarded.

As you can see, these two customer journeys look very different and are likely to be at odds with each other. That's why it's so important for the sales and marketing departments to put their heads together in order to create a standard buyer journey, based on agreed-upon buyer personas.

When done successfully, both teams will be able to help one another find and determine solid sales leads that are set to convert into loyal customers down the line.

## Tracking Joint Key Performance Indicators

Another important element to aligning your sales and marketing teams is to set standard key performance indicators (KPIs) that ensure that no efforts on either side are counterproductive.

For example, if your business sets a marketing-qualified lead (MQL) target for the marketing team to hit without considering how it will impact your sales team, it could lead to bigger issues down the road. A high MQL target could result in your marketing team passing along less qualified leads, which could tank sales conversion rates.

The best way to set unified KPI targets is to review current conversion rates across the whole sales funnel and then work backwards to calculate valuable metrics to aim for.

Ask yourself these questions:

- ➔ How many new customers do we need to reach revenue goals?
- ➔ How many MQLs or SQLs do we need to close that number of sales?
- ➔ How many leads do we need to generate to produce that number of MQLs?
- ➔ How much website traffic do we need to create that many MQLs?

Based on the information these questions uncover, you can set KPI targets that are [productive for both marketing and sales functions](#). This will help align tactics to focus on increasing revenue and business growth in a meaningful way.

# Keeping Your Sales and Marketing Messages Consistent

When talking to prospects, it's tempting to dive into all the unique features of your product or service. Those technical specifications and capabilities can be very exciting for those who work within your company. After all, you're proud of what you've got to offer.

But these concepts aren't the most valuable content for incentivizing a purchase. In almost every situation, the **VALUE** of the purchase must be communicated well in advance of any specific features. The key is to connect your marketing and sales messages to show what the inherent buyer value is.

**CONSIDER THESE TWO STATEMENTS. WITHOUT CONTEXT, WHICH IS MORE COMPELLING?**

**“ABC SERVICE HAS AN EASY-TO-USE INTERFACE, DOZENS OF CUSTOMIZATION OPTIONS, AND GREAT SUPPORT.”**



**“GET PEACE OF MIND WITH COMPREHENSIVE, END-TO-END DATA SECURITY. SCALE YOUR SECURITY AS YOU SCALE YOUR BUSINESS. 100% GUARANTEED.”**

In the first statement, an “easy-to-use interface” is only a nice feature... and features don't move buyers to action. On the other hand, the second statement clearly answers the question: “What's in it for me?” Peace of mind is a compelling concept. It communicates value and triggers an emotional response.

There are a number of ways you can uncover what your customer values most in your offering:

- ⌚ Talk to happy customers to understand why they like you and your offerings
- ⌚ Analyze company testimonials and conduct persona research to understand themes that pop up
- ⌚ Ask the question “How has our product or service changed your life?” and find a pattern in the responses
- ⌚ For a more candid view, dig into the actual statistics related to efficiency and security, finding anecdotes about relief, growth, and innovation

When you get too attached to the exciting features of your product or service, you often have trouble differentiating yourself from the overall value your company provides to the buyer. Instead, use the customer insights and feedback you gather to develop a strong message that both marketing and sales can deliver to get the best results.

## **Communicating Well and Often**

Here's the thing: your marketing and sales teams need each other.

Together, they can collect and share key insights into the buyer journey to successfully turn a prospective lead into a returning customer. And once this initial work has been done, there is always room for improvement and optimization.

Your marketing and sales teams should meet on a regular basis to review results, improve processes, and plan future campaigns. Joint meetings should, however, be based on clear definitions of accountability so that attendees can focus on sharing information and avoid treading on each other's toes.



WANT MORE TIPS? WATCH THE LIVE RECORDING OF OUR COFOUNDER AND CEO, TODD LAIRE, AS HE DIVES INTO THE PROVEN METHODS FOR ALIGNING YOUR SALES AND MARKETING FUNCTIONS TO DRIVE REVENUE AND UNLOCK NEW BUSINESS GROWTH.

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