Aligning Sales and Marketing for greater performance.

You are frustrated that **sales and marketing** functions in your business are misaligned, and you believe this is holding your business back.

This workbook provides a framework to quickly identify positive steps that can be taken, and helps you take those steps. We're going to rally around the shared aspects of these two important teams reason for being:

1. Both teams spend all day telling the story of the business
2. Both teams talk primarily to customers
3. Both teams rely on each other for feedback when trying new things
4. Both teams contribute to growth

So grab a sharpie, sit down with the right people, and get to work.

Consistent messaging across sales and marketing, and across Brand and Product

Who should be in the room: Someone from sales, someone from marketing.

What resources do you need: A client presentation slide deck, and some trade show or advertising literature that is representative of the brand.

What should you do: Fill the pyramid based only on the content of the gathered literature and slide decks. Highlight gaps, highlight contradictions, highlight disconnects.

What next: If you didn't highlight any problems then well done, you passed the messaging consistency test. Perhaps repeat with another slide deck from another sales member, and with some different marketing material.

If you did highlight problems then the hard work starts now. Ironing those out might be simple, or might demand some deeper work. Either way it's vital.

	Sales	**Marketing**
Brand Name		
Market space descriptor (three words)		
Strategic Principle (two - four words)		
Mission Statement (six - 10 words)		
Elevator Pitch/Proposition (three lines)		
Key Messages (by medium and stakeholder grouping)		

The CRM is a goldmine, not just for sales, but for the whole business

The diagram opposite symbolises how the marketing and sales processes cross over.

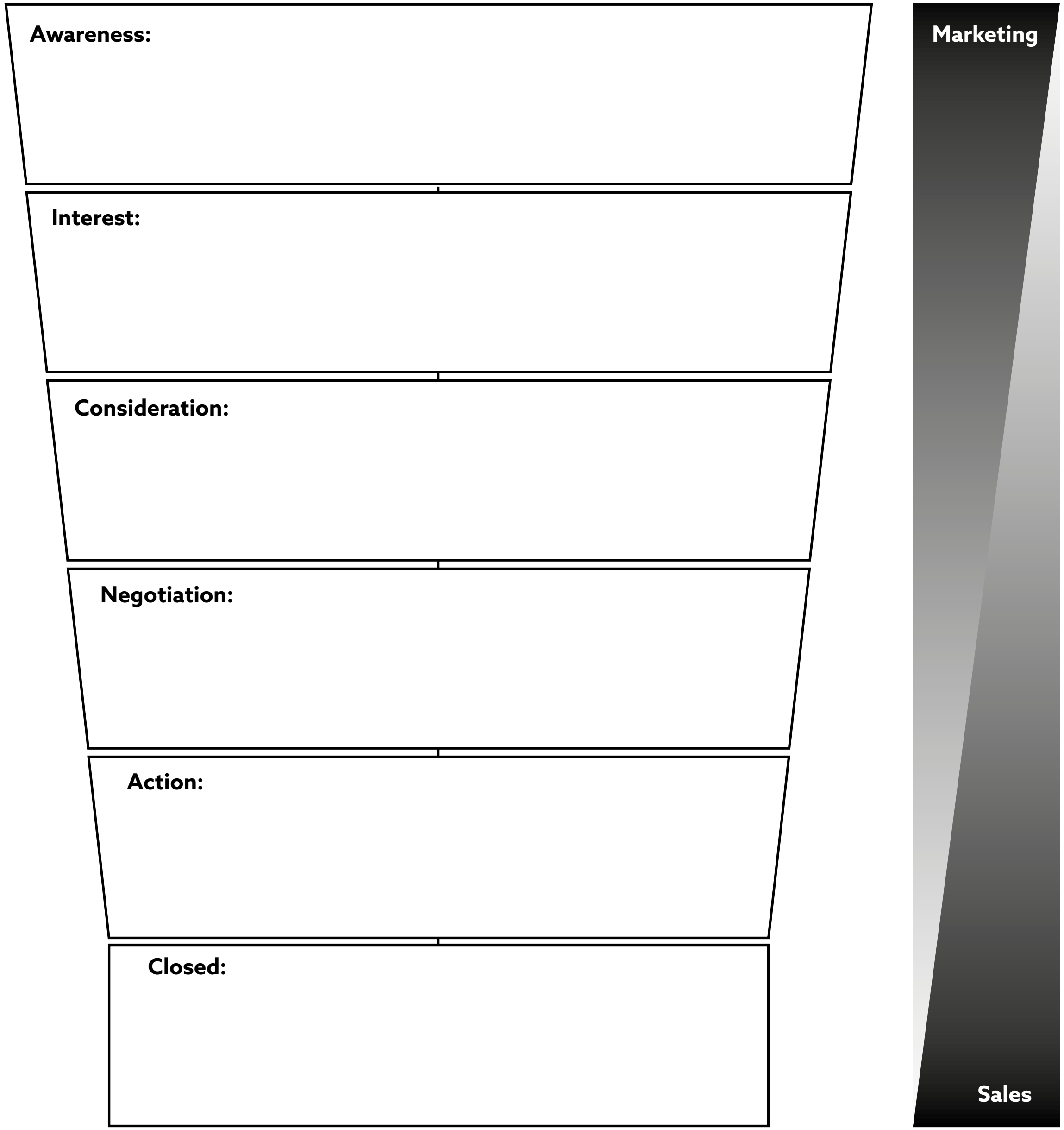
There are so many interesting stories, interesting developments, and useful observations that more should be done to capture these and use the insights to communicate more effectively with your customers.

Who should be in the room: Someone from sales, someone from marketing.

What resources do you need: Access to the CRM and an hour.

What should you do: Review the comment chain across a number of recent projects. Pick 2 projects at each stage of the buyer journey. Identify the questions / challenges / comments from the client, and the responses from sales and map them into the pipeline diagram.

What next: Do these match the conversations and talking points that marketing expected? If not, perhaps there are interesting observations that can be pulled into marketing level messages to pre-empt or leverage the conversation to speed up conversion?



The feedback loop

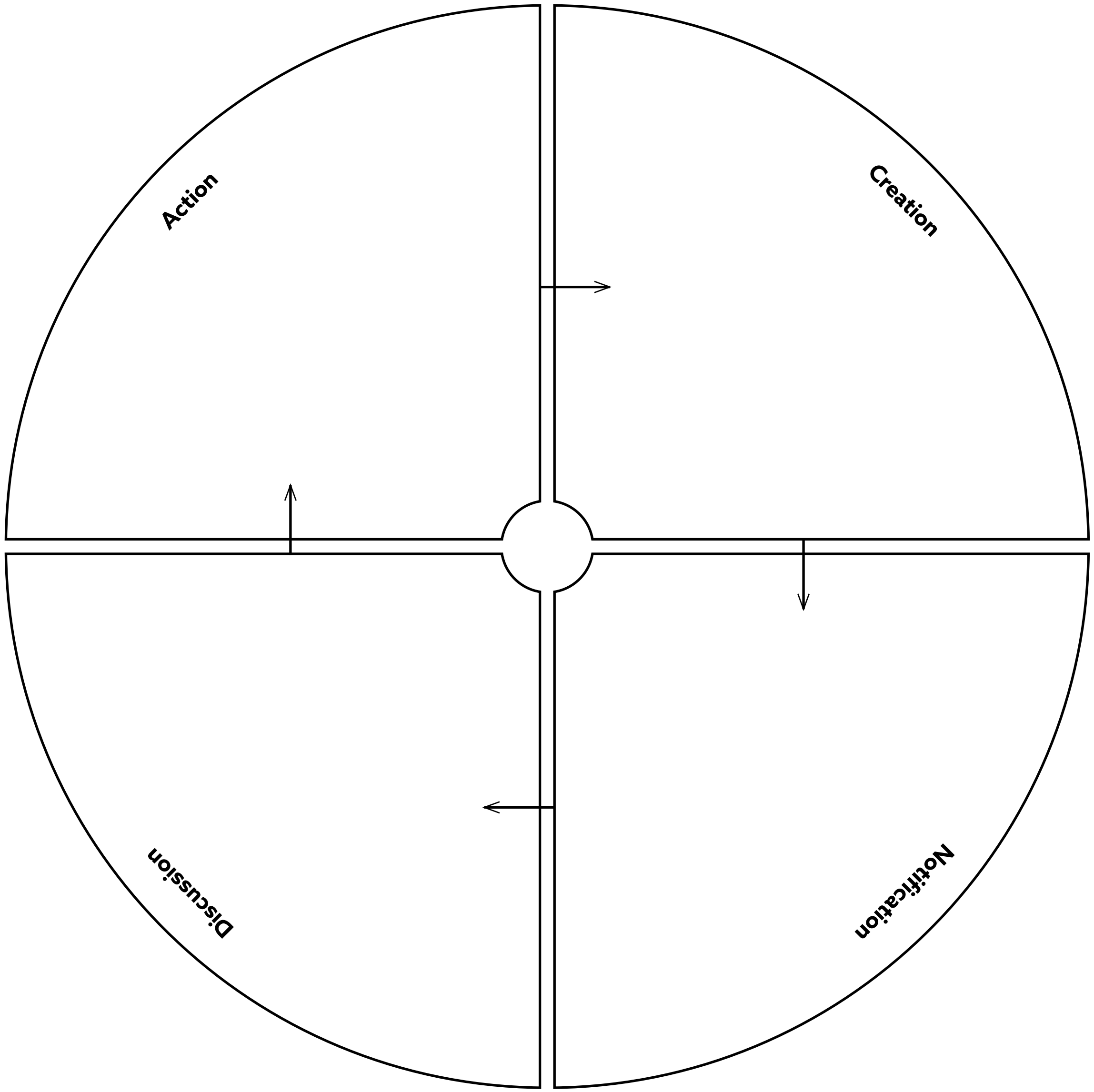
Very often there are only two types of interaction between teams. Blocking sign off, or absolutely no proactive interaction. This can mean that teams only share activity and insight when they **have** to. That's not great.

So let's design and implement a feedback loop in an hour. Remember – it is really important that this is a feedback loop rather than an approvals loop.

Who should be in the room: People from both teams involved in creating new communications material such as presentations or advertisements.

What should you do: Start at creation, and list the various types of material being created in each team. For each cluster, then enter names (or roles) that should be notified when this is created. Now under Discussion, note whether a discussion is needed, is optional, or is usually not required.

What next: At this stage there will be nothing to note under Action, but keep this page, and note actions that emerge from this exercise. You'll be surprised how many small improvements this simple principle drives.



Pipeline KPIs

Set your target numbers for each stage of the marketing funnel.

Awareness:

____________________ Marketing

Interest:

____________________ Marketing

Consideration:

____________________ Marketing

Negotiation:

____________________ Sales

Action:

____________________ Sales

Closed:

____________________ Sales

Pipeline KPIs

Draw a marketing and sales funnel. Split it in 2. Enter some numbers, and highlight the handover points from one stage to another. The simplified version in our workbook is often all that is needed. This needn't replace (or even impact in any way) the sales map of advances and deal stages.

Who should be in the room: Senior people from both teams.

What should you do: Starting from the sales targets, enter a number of customer deals to be closed for the year, and work backwards. How many leads does that require Marketing to send through to Sales, how many first contacts do Marketing need to generate in order to reach this number?

What next: Once you have your numbers look at your analytics and see how close you are currently. You might get a shock. One thing this exercise always does is focus the mind on where budget should be spent. Do you have an awareness, a conversion, or a closing problem?