THE COMPLETE GUIDE TO

UNIFYING YOUR SALES & MARKETING EFFORTS

How to Create a Sales & Marketing Powerhouse

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HENDERSON ROBB

CONTENTS

> *“Mistrust and miscommunication between sales and marketing can act like an anchor on your company’s growth rate.”*

By now, most marketers understand the importance of mending the traditional rift between sales and marketing. The mistrust and miscommunication that’s so often found between the two teams can act like an anchor on your company’s growth rate.

In fact, organizations with good alignment between sales and marketing teams achieved 20% annual revenue growth in 2010, according to a study by the Aberdeen Group. By contrast, companies with poor alignment saw revenues decline by 4%.

That’s why many companies work hard to generate better communication between sales and marketing – only to see cracks between the two groups re-open over time. The bottom line is that achieving sales and marketing alignment can be tough, but maintaining alignment is even tougher.

Creating a solid, lasting partnership between sales and marketing requires a strategic approach that treats the two teams as a single, revenue-generating organization. At Henderson Robb, we call this organization the “Smarketing” team to recognize the fact that sales and marketing are critical partners – not adversaries. This perspective has helped our teams maintain strong ties even as we’ve grown from a handful of people to more than 100 staff members.

The key to the Smarketing approach is implementing a framework of data-driven tools and practices that help sales and marketing teams work better together. Once hard numbers have defined key stages of your funnel and outlined each team’s expectations, there’s a lot less room for sales and marketing to argue about each other’s performance. The results are plain for everyone to see.

This ebook will teach you the science of sales and marketing alignment and show you how to implement the six key elements of the Smarketing framework. That way, the gains you achieve from better collaboration between sales and marketing can last in the long term.

CHAPTER 1

SETTING UP CLOSED-LOOP REPORTING

> *“Using closed-loop data you can see which marketing programs deliver the best bang for your buck.”*

Data is the crucial ingredient for maintaining sales and marketing alignment. You need data to monitor progress toward goals, analyze lead quality, and measure marketing ROI. So the first step in creating a Smarketing organization is establishing a closed-loop reporting system that tracks key marketing and sales metrics.

The two key pieces of this system are:

- MARKETING SOFTWARE

  Marketing software that helps you with lead generation and management.

- CRM (CUSTOMER RELATIONSHIP MANAGEMENT)

  CRM system that helps you track and measure sales activities.

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Sharing the Same Data

These two systems must be integrated to share data on every lead from creation to opportunity stage to close, so you can build reports that show the close rate and new customers from the leads generated by marketing. Many marketing software platforms automatically integrate with popular CRM systems. For example, HubSpot's marketing platform integrates with Salesforce.com, SugarCRM, Microsoft Dynamics, NetSuite, Sage and several others.

Other features you should look for in a closed-loop marketing system include:

- Automatic, two-way synchronization between the marketing platform and your CRM.
- De-duplication of leads by matching on email address and tracking information, so as leads come back to your website you are updating existing lead records not creating duplicate leads.
- The ability to pull information from the CRM into the marketing platform, allowing you to segment your leads by data the sales team has added to the lead or contact records.

Information Sharing

Next, begin sharing information between the two platforms that will help the sales and marketing teams improve their performance.

What should marketing share with sales?

COMPLETE LEAD INTELLIGENCE

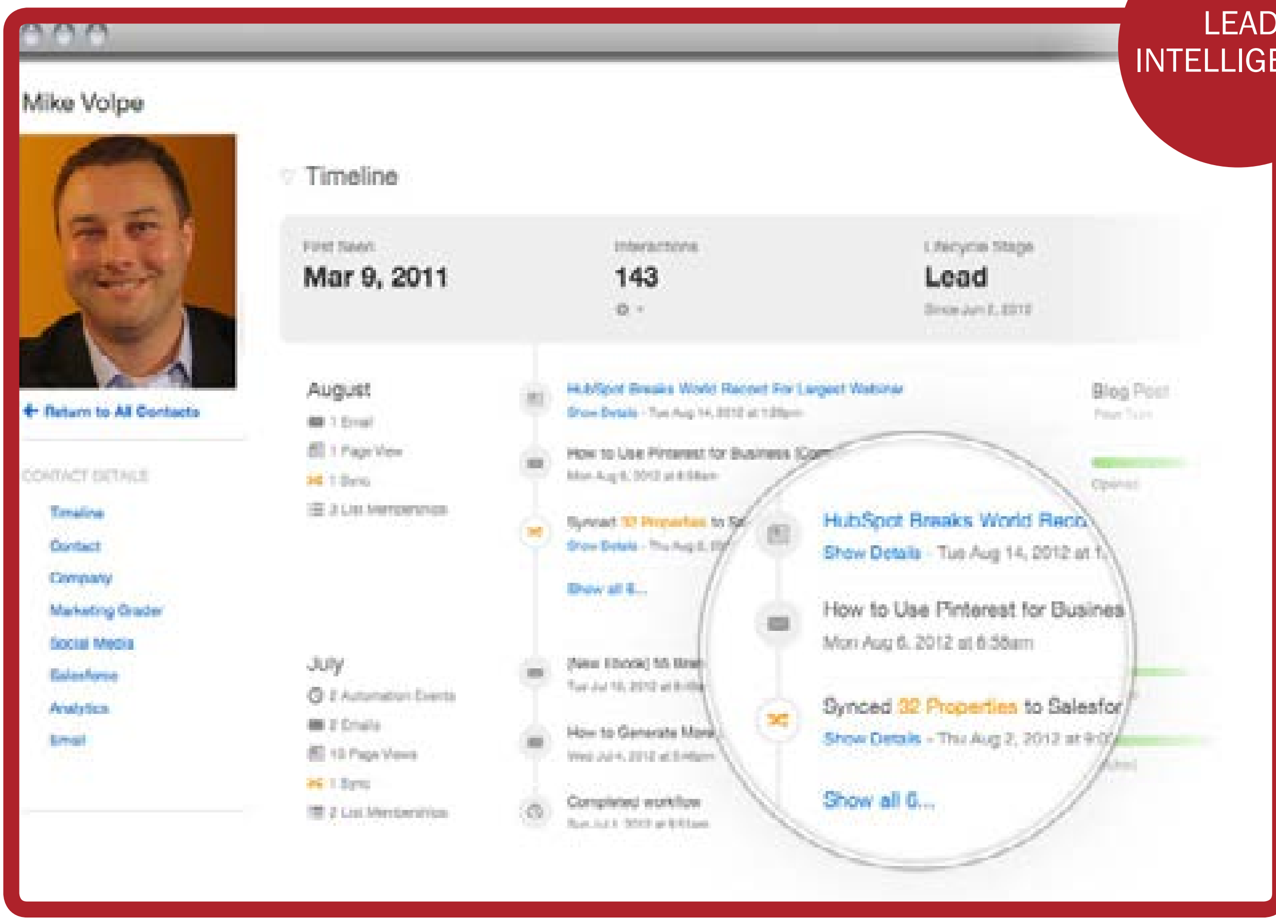
Complete lead intelligence, including the history of each lead's activity on your website: campaign engagement, download history, and social media presence. Appending these details to each lead record helps sales reps plan their follow-up strategies and find hooks to start that first conversation.

LEAD ALERTS

Lead alerts such as an email message or other notification when a particularly hot lead visits your website again, responds to an important campaign, or takes another trigger action, such as requesting to speak with a salesperson.

These types of insights are available in integrated marketing software platforms like HubSpot. See examples of both lead intelligence and lead alerts on the next page.

LEAD INTELLIGENCE



LEAD REVISIT ALERTS

What should sales share with marketing?

Here are some suggestions.

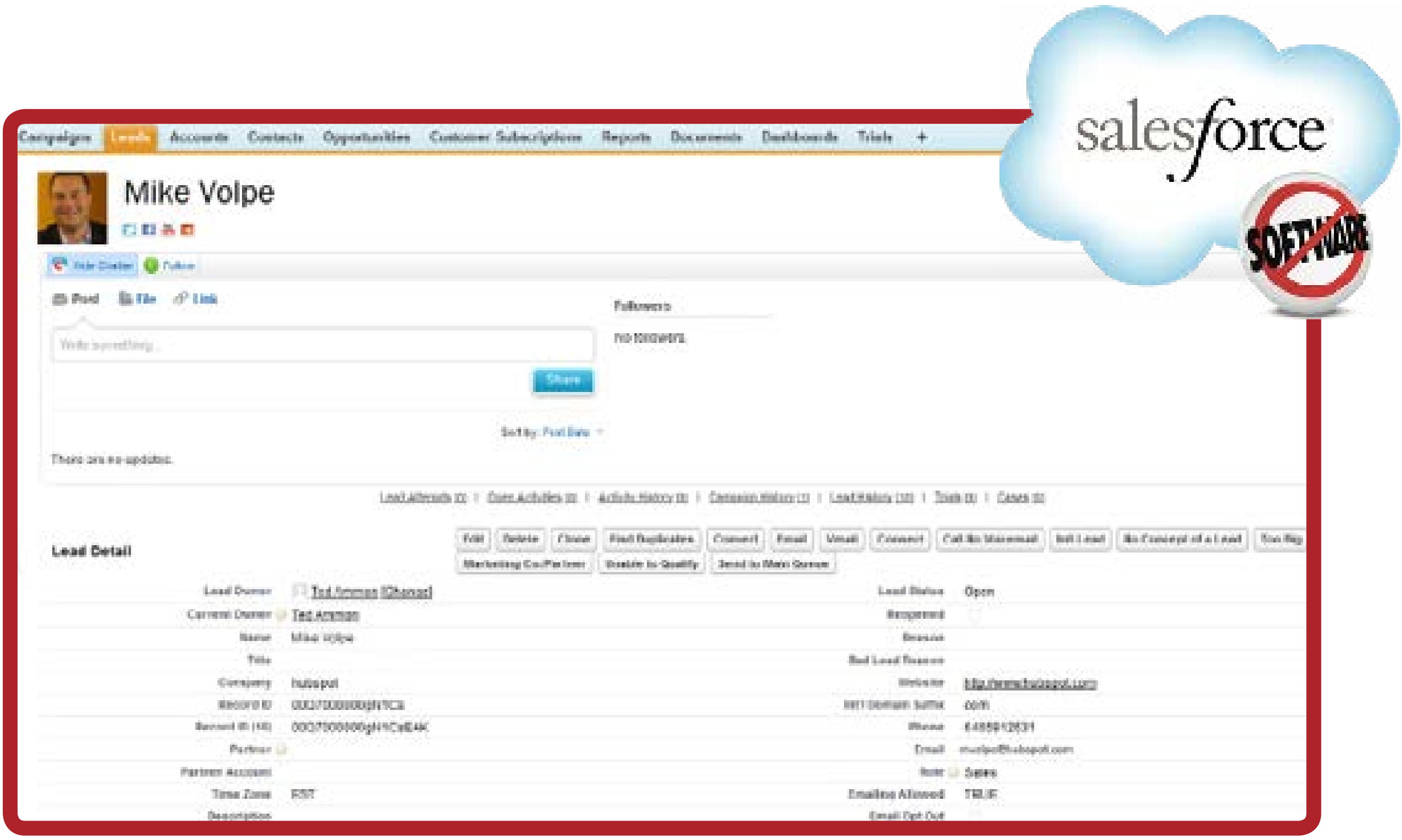
- CONTACT TOUCHES
  Records of email and call attempts and connects.

- LEAD STATUS UPDATES
  Updates on lead status, such as open, in progress, qualified and unqualified.

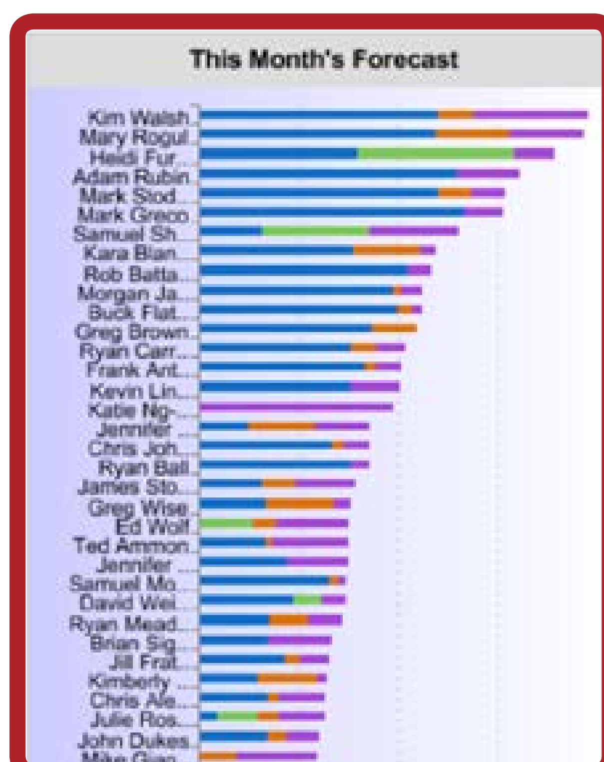
- REVENUE NUMBERS
  Data on closed deals and the revenue associated with each contract, to calculate marketing effectiveness and ROI.

These types of insights are available in CRM solutions like salesforce.com. See the next page for examples of how lead intelligence, contact touches and forecast numbers can be displayed in salesforce.com.

Using this closed-loop data, you can track how each customer progressed through your marketing funnel and see which marketing programs are delivering the best bang for your buck.

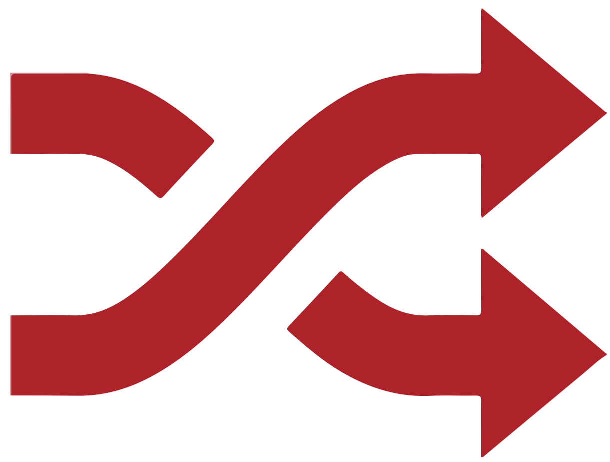

salesforce
SOFTWARE
Campaigns
Leads
Accounts
Contacts
Opportunities
Reports
Documents
Dashboards
Mike Volpe
Post
File
Link
Share
Lead Detail
Lead Owner
Lead Status
Open
Company
hubspot
Time Zone


Todays Lead Attempts
Ally Pelle
Greg Wise
Ted Engel
Ed Wolf
Ted Ammon


This Month's Forecast
Kim Walsh
Mary Rogul
Heidi Fur
Adam Rubin
Mark Stod
Mark Greco
Kara Blan
Rob Batta
Buck Flat
Greg Brown
Ryan Carr
Frank Ant
Kevin Lin
Chris Joh
Ryan Ball
Greg Wise
Ed Wolf
Ted Ammon
David Wei
Ryan Mead
Brian Sig
Jill Frat
Kimberly
Julie Ros
John Dukes

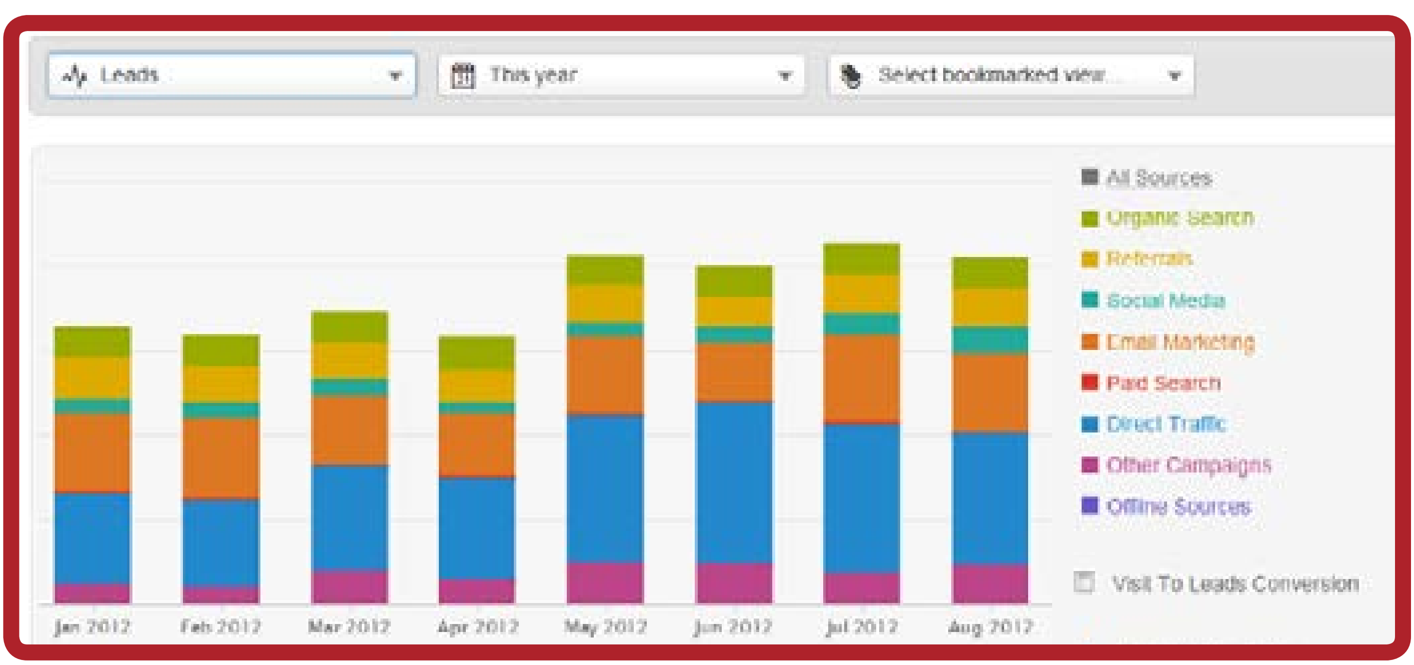
Identify Winning Marketing Channels

Trace each customer back to the source of their first visit to your website – e.g., Paid Search, Organic Search, Social Media, or Email Marketing. You also can analyze each channel for other key metrics, such as:



- Visits per channel
- Leads per channel
- Visit-to-lead ratio per channel
- Lead-to-customer ratio per channel

Use this data to optimize your marketing mix and focus on the channels that are delivering the best conversion metrics.

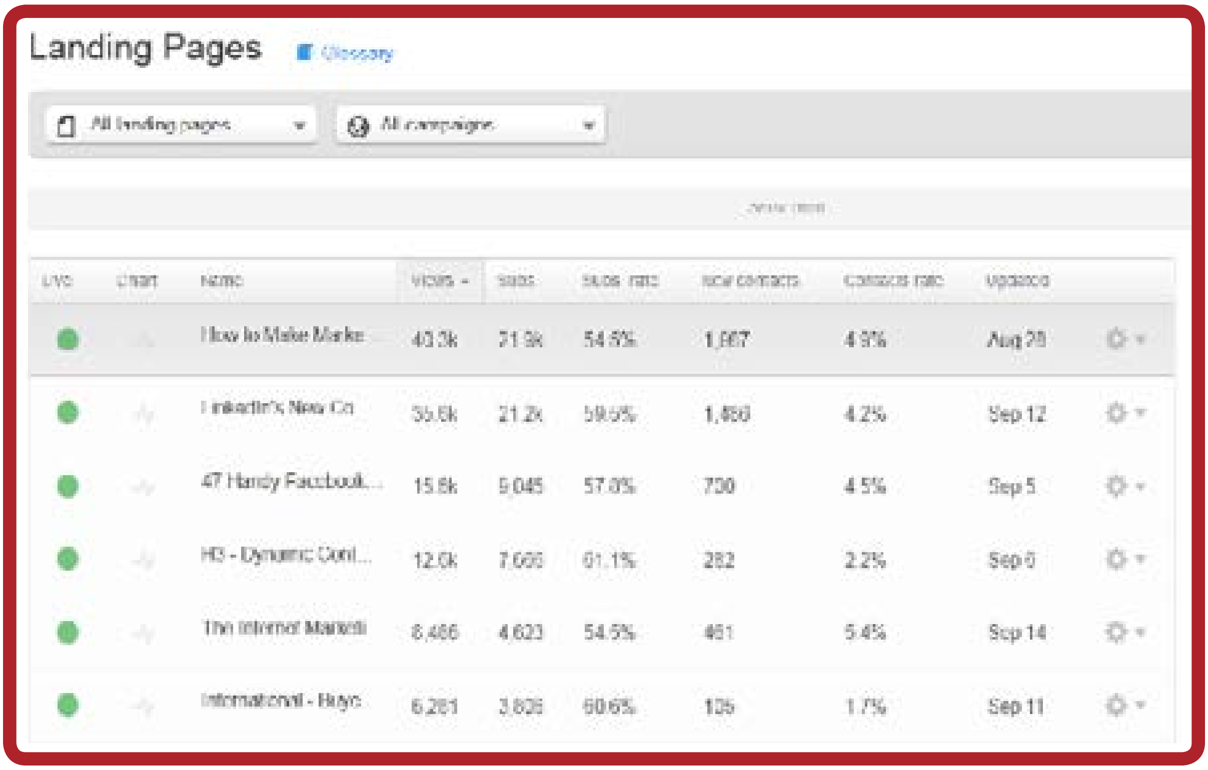


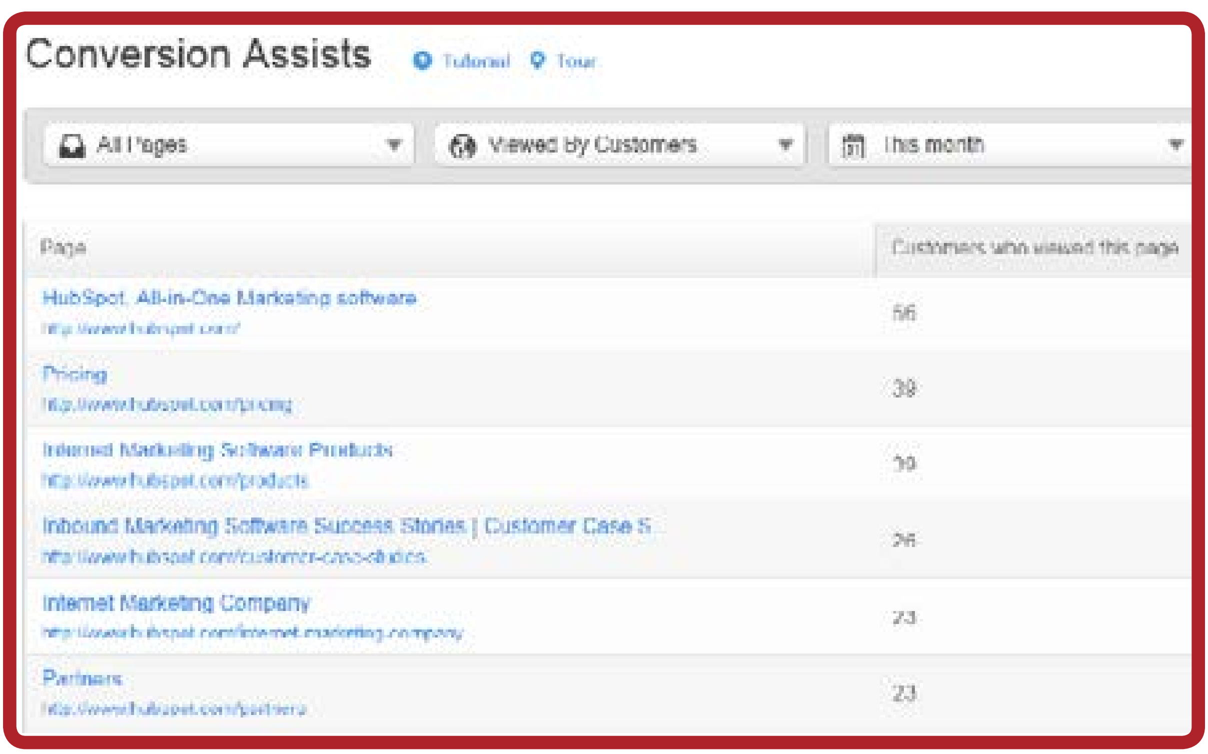
Examine the lead history of each customer and record every marketing touch and action that occurred between lead capture and close.

By calculating the percentage of customers who visited a specific page on your site prior to conversion, or who viewed a particular webinar or white paper, you can see which of your content was most effective in your marketing funnel. (ex.*HubSpot software performs this analysis automatically for customers in a Conversion Assists Report.*)

This process also can include a review of specific market campaigns to determine which generated the most leads and customers. Or, you can look at which of your campaign landing pages generated higher-than-average conversions. The insights you gain from these reports can help you fine-tune your content strategy or optimize your site to promote more influential pages.

Sales and marketing teams often have a very different picture of the funnel. They might disagree about the number of stages a lead passes through before becoming a





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CHAPTER 2

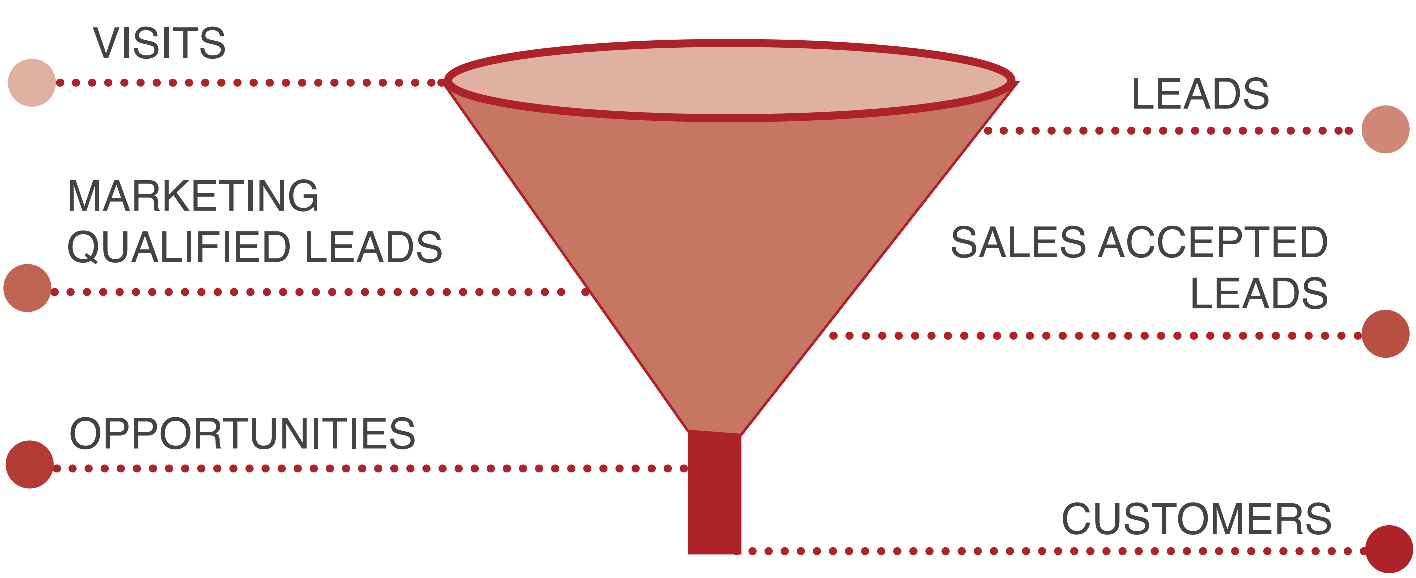
HOW TO DEFINE YOUR FUNNEL

> *"Sales and marketing must have a unified picture of the funnel."*

customer – and they often use different terminology to describe those stages.

To adopt a Smarketing strategy, sales and marketing must have a unified picture of the funnel and standard definitions of each stage in the process. For example, Henderson Robb's Smarketing team uses the following funnel stages:

Understand Lead Quality



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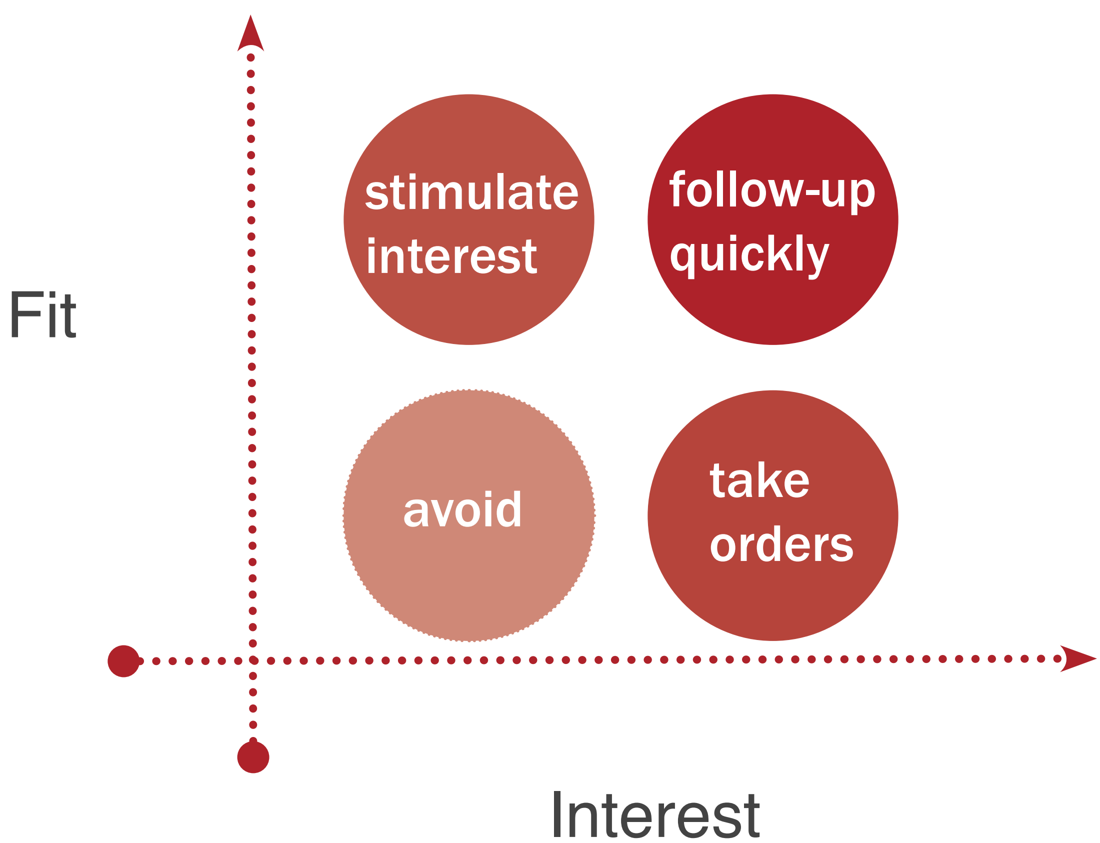
Focus on the definition of a Marketing Qualified Lead (MQL). This is the crucial hand-off point between marketing and sales, so it's essential that the teams agree on the terminology.

Every company's definition of an MQL will vary, but it should reflect a combination of traits and actions that indicate a lead is both a good fit for your company and ready to talk to a sales person. Here's one way to examine your funnel to assess lead quality and determine whether a lead is ready for sales follow-up:

Aspects of Lead Qualification



1 IS THE LEAD A GOOD FIT?

Your company might target financial services companies with 5,000 or more employees, or small service businesses with fewer than 100 employees. Or, you may be only interested in manufacturing companies of any size. Within those categories, you also might identify individual lead profiles, such as title or job description and role in the decision-making process – e.g., economic buyer, end user, influencer.

How closely a lead hews to your ideal customer profile will determine whether and when you hand it over to the sales team.

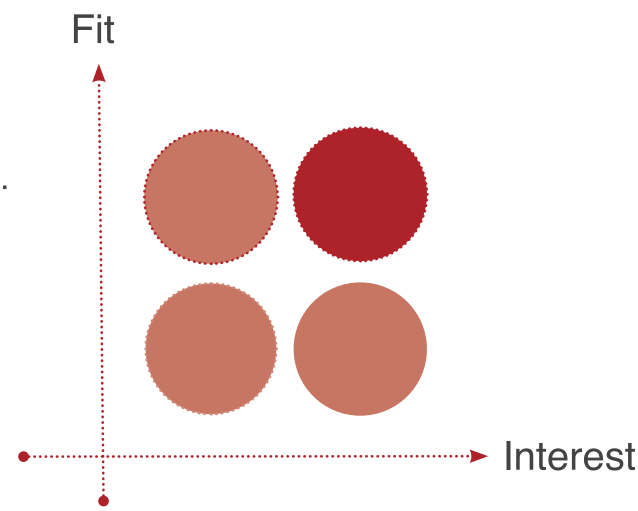
2 IS THE LEAD INTERESTED?

A lead's activity can reveal how close they are to a buying decision. For example, if a lead has only visited your website once, or has just begun following you on Twitter, they may be aware of your company but are not particularly engaged. But a lead that requests a demo or views pricing information is showing a lot more interest.

Where a lead falls within the four quadrants of this matrix dictates the next step your marketing or sales team should take. For example:

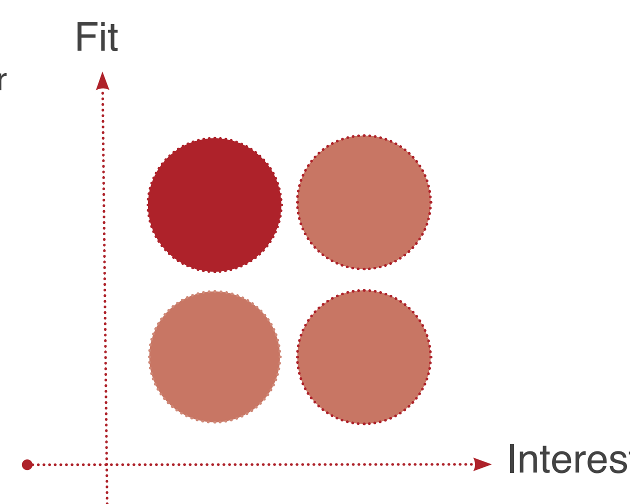
GOOD FIT & INTERESTED

Leads in upper right quadrant are a good fit for your company and are highly engaged with your marketing. These are hot leads that require immediate follow-up from your sales team – usually in less than 24 hours.



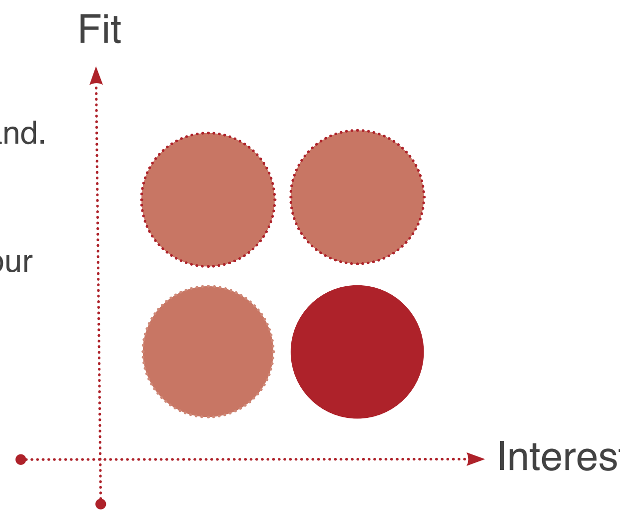
GOOD FIT BUT LESS INTEREST

Leads in the upper left quadrant are a good fit for your company, but don't show a lot of interest yet. Perhaps they've only signed up for an email newsletter or downloaded one piece of educational content. These are leads that the marketing team need to nurture.



LOTS OF INTEREST BUT NOT A GOOD FIT

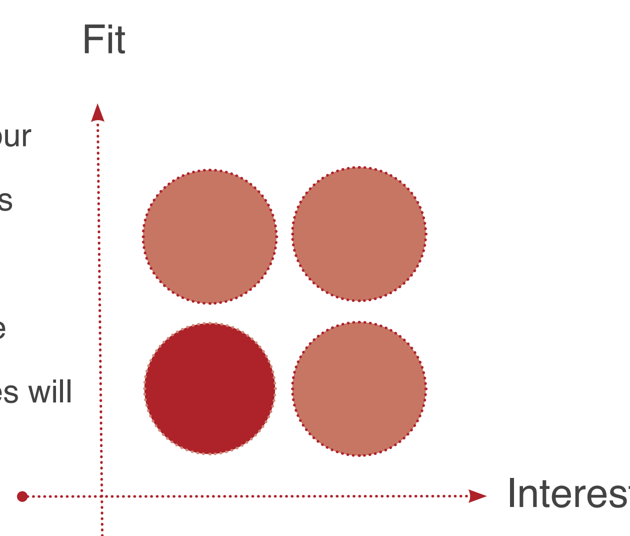
Leads in the lower right don't necessarily fit your ideal customer profile, but are highly engaged with your brand. They might have subscribed to your blog and email newsletter, downloaded your ebooks, and attended your webinars. It's worth having a sales rep do a low-cost follow-up with these fans to see if there's an easy sale to make from a non-traditional customer.



Sometimes leads that don't seem like a fit have a good reason to buy your product. They can also turn into great evangelists for your products or services, thus providing you with indirect support as non-customers. That's why you can't automate the entire sales and marketing process. At some point, a good marketer or sales rep can spot an opportunity that your systems might overlook.

LITTLE INTEREST & NO FIT

Leads in the lower left quadrant aren't a good fit for your company and haven't shown much interest in your marketing content. They're definitely not worth a sales rep's time. Don't be afraid to take them out of your communication stream. By having a clean list of more engaged subscribers, your email and social messages will show more better results.



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Develop Your Definition of an MQL

Using this matrix as your guide, develop an MQL definition based on the combination of fit and interest that's right for your company. Some marketers may focus more on fit because they have a tightly defined market; other marketers may have a broad customer base and focus more on interest level. That decision depends on your business model.

MQL definitions in those two cases might look like this:

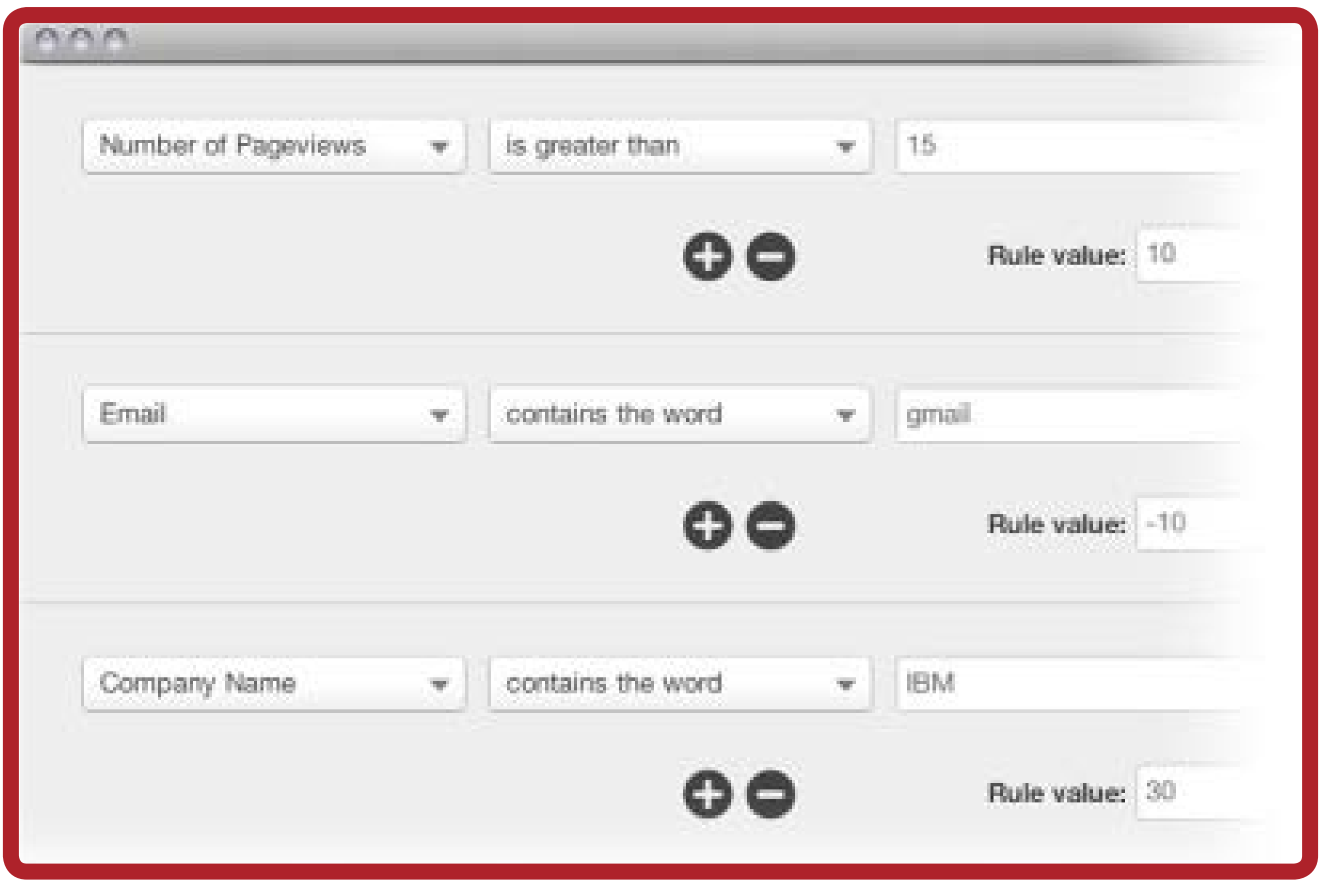
> A contact with the right title or role that has filled out a landing page form and works at a financial services company in the Canada with more than 5,000 employees.

> A contact with the right title or role at any Canadian.-based company that has requested a product demonstration from a sales rep.

Whichever approach you chose, base your definitions on data – not on gut instinct. Even experienced marketers and salespeople can be way off base in their assumptions about what makes a good lead.

Example of Lead Scoring

Here is an example of what lead scoring can look like for you:



Using a lead scoring or lead grading program that relies on data from your closed-loop analysis can help you determine the importance of different activities.

How You Can Do It

EXAMINE BEHAVIORAL HISTORY

Examine the activity history of recent customers and analyze how many actions they took before becoming a customer – i.e., the number of page views or number of conversions, such as downloading a white paper or registering for a webinar, etc.

FIND PATTERNS

Look for patters that indicate a lead's likelihood of closing. For example, if a lead that downloads 10 pieces of content from your website or visits your site more than 15 times in one month is more likely to close, you can incorporate those frequency measures in your MQL definition.

LIST ACTIVITIES

Also list all the activities that a lead can take before becoming a customer, and analyze the close rate for each one.

For example, to determine the close rate for a webinar, look at all customers that had watched a webinar, then divide that number by the total number of leads that originally registered for the webinar. That gives you the close rate for leads from that particular event.

CALCULATE CLOSE RATES

Using the close rates for individual actions, calculate the average close rate for all your marketing activities. Then look for actions that have a significantly higher close rate. For example, if your average close rate is around 1%, you might find a handful of actions that have a 3%-5% close rate.

Add these top-closing events to your definition of an MQL. Any lead that engages in at least one of these activities, and is a good fit for your company, would be considered an MQL. Also use those close rates to decide what score to give different activities in your lead scoring or lead grading system.

CHAPTER 3

IMPLEMENT A SERVICE-LEVEL AGREEMENT (SLA)

> *"The service-level agreement (SLA) is a two-way process between sales and marketing."*

The MQL definition is the centerpiece of another critical Smarketing strategy: Implementing a service-level agreement (SLA) between sales and marketing.

The SLA formalizes the commitment that the sales and marketing teams make to meet shared goals for revenue growth. It's a two-way process: The marketing team commits to delivering a certain quantity and quality of leads each month to help the sales team meet its quota. The sales team then commits to follow up on those leads in a timely manner, and to make a specific number of contact attempts before abandoning the lead.

To set up the SLA for the marketing team, start by asking these questions:

- How many quality leads does the sales team need to make quota?
- What percentage of those leads is originated by marketing?
  Your sales team may be doing some of its own prospecting, and therefore the marketing team isn't responsible for 100% of the leads needed to make quota.
- What percentage of those leads is influenced by marketing?
  Even if the leads originate from another source, the marketing team may be required to nurture those leads until they are marketing qualified.

Once you've answered those questions for your company, compute the SLA based on the percentage of the pipeline that the marketing team needs to drive. But here's a tip to make the SLA even more convincing for your sales team: Base the SLA in the units that are most relevant to a sales person – dollar figures.

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How to Calculate SLA in Dollar Value

To calculate an SLA in dollars, take the percentage of the sales quota that marketing is responsible for each month – e.g., $200,000. Then, calculate the value of each MQL to determine how many leads marketing must deliver to reach that total. Here is how to calculate the value of an MQL:

1. Create a list of all the different campaigns or offers that have generated leads in your pipeline – such as white paper registrations, demo sign-ups and trade shows. You also can segment your leads by type of customer, such as enterprise vs. mid-sized and small business.

2. Pull a list of recent customers and match them to the campaign or offer that generated their first visit or conversion. Then, calculate the average revenue per customer for each lead source. (If you're segmenting by type of customer, you also can calculate the average revenue per large vs. mid-sized or small customer.)

3. Look at the average close rate for each campaign or offer. Then, multiply the average revenue-per-customer for those campaigns/offers against the close rate to determine the average MQL value.

For example, if the average revenue per customer from a lead that converted on a whitepaper is $160,000 and the average close rate on those leads is 1%, the value for each whitepaper MQL is $1,600.

MQL Type	Average Revenue/ Customer	MQL to Customer Close %	Value per MQL
Whitepaper	$160,000	1%	$1,600
Webinar	$100,000	1.5%	$3,000
Online Demo	$150,000	2%	$3,000
Tradeshow	$125,000	1%	$1,250
Contact Sales	$110,000	10%	$11,000

Based on those figures, you can establish an SLA might look like this:

- MARKETING WILL DELIVER XYZ WORTH OF MQLS PER MONTH

  To set up the SLA for the sales team, start by figuring out how quickly a sales rep should follow-up on a new MQL. How many contact attempts should the sales team make for every MQL of a certain type? How many follow-up attempts per lead should the sales team be able to complete each month?

Based Every Decision on Real Data

Once again, it's important to use data to determine the sales team's responsibilities. Take the question about the ideal number of contact attempts: Even though your chances of successful connection increase each time you call a lead, those calls also have a cost associated with them: the sales rep's time. At some point, the potential return for making additional calls will diminish.

That's why you need to determine the optimal number of times to call a lead based on the profitability of that activity. Here's one way to find that optimal number:

1. START WITH STALE LEADS
   Select a portion of leads that had been in the sales pipeline for at least a few months.

2. GROUP DATA
   Look at your CRM records to determine how many times the sales team attempted to contact each of those leads before closing. Create cohorts of leads that were contacted once, twice, three times, four times, etc.

3

MAKE ESTIMATES

Estimate how much each contact attempt costs your sales team. You can do this by estimating how many hours a month a rep spends making calls and the average number of contact attempts he or she can make each hour. Then, determine the cost-per-call by dividing the average hourly cost of a sales rep's time by the average number of calls per hour.

4

BENCHMARK

Benchmark the profitability of these contact efforts by dividing the average revenue for each customer by the cost of calling a lead once, twice, three times, etc.

5

PLOT DATA

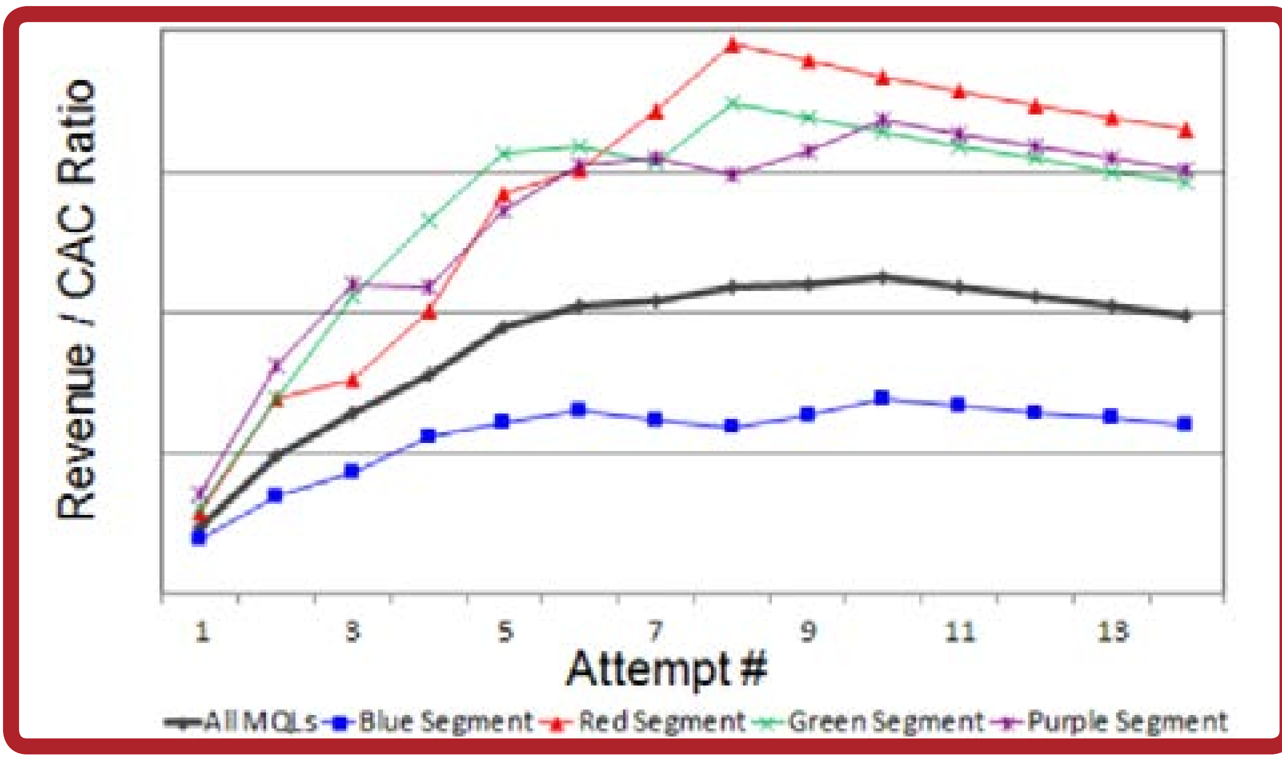
Plot that data in a chart that uses the number of contact attempts as the X axis and the profitability score as the Y axis. Because additional contact attempts tend to generate more sales, you should see a line that gradually rises in profitability with the number of attempts.

6

NOTE RESULTS

Note where the lines level off – meaning the profit-per-customer isn't increasing despite the additional contact attempts. This leveling-off point is the recommended number of contact attempts to use in your SLA.

Here's an example of this type of analysis created by Bill Robb. The coloured lines represent the results for different types of leads in the Henderson Robb's sales funnel. As you can see, the benefits of additional contact attempts tend to level off around eight or nine contact attempts:



Based on those results, the sales SLA might require sales to make one follow-up attempt within four hours, with eight attempts in 14 days. Remind the sales team of their responsibilities by putting the SLA rules about contact times and follow-up attempts in your CRM system.

CHAPTER 4

A DEEP DIVE INTO DASHBOARDS & REPORTING

> *"Failing to monitor progress is a common mistake - and it can be costly."*

After implementing the SLA, use the data from your closed-loop reporting system to track progress towards those goals. Failing to monitor progress is a common mistake made by companies with poor alignment between sales and marketing – and it can be costly. If you're not keeping an eye on your goals, you're less likely to spot areas of concern until they spiral into big problems. At that point it may be too late to do anything about it.

Manage your Smarketing organization with these two valuable tools:

- DAILY DASHBOARDS
- DETAILED MONTHLY REPORTS OF SALES AND MARKETING ACTIVITY

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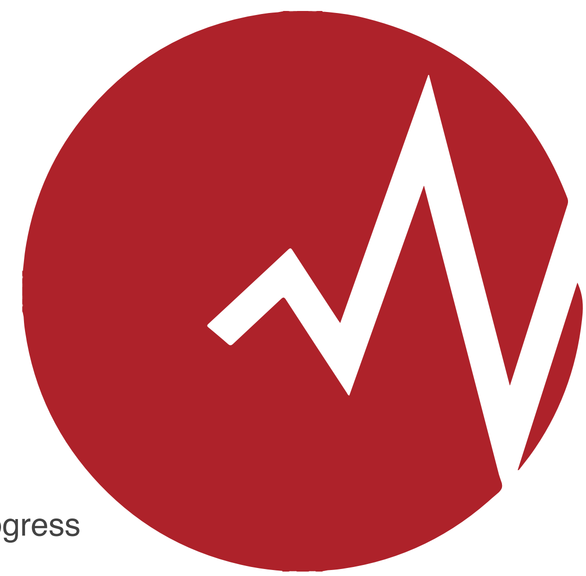
Dashboards

Sales and marketing dashboards turn data from your closed-loop reporting system into a daily snapshot of the team's progress. Dashboards should be shared with the entire Smarketing team by building them into your CRM system, incorporating them into your marketing software platform, or emailing them to the entire team.



This highly public update not only tracks your progress toward goals, but it can also help your team meet their goals. Marketers and salespeople are less likely to fall behind if they know that the rest of the team will see their numbers every day. And if people do fall behind, they're more motivated to fix problems on their own.

The Marketing Dashboard

This Marketing Dashboard, also known as the Daily Leads Waterfall Graph, is a simple but very effective way to visualize your marketing team's progress toward its SLA goals. The graph compares your actual daily lead flow against the target rate that you need to hit your monthly goals.

Generating a Daily Leads Waterfall Graph is simple. If you're a HubSpot customer, your software does it automatically on your Dashboard.

If you're not a HubSpot Customer, you can use this Excel template to create and maintain your graph.

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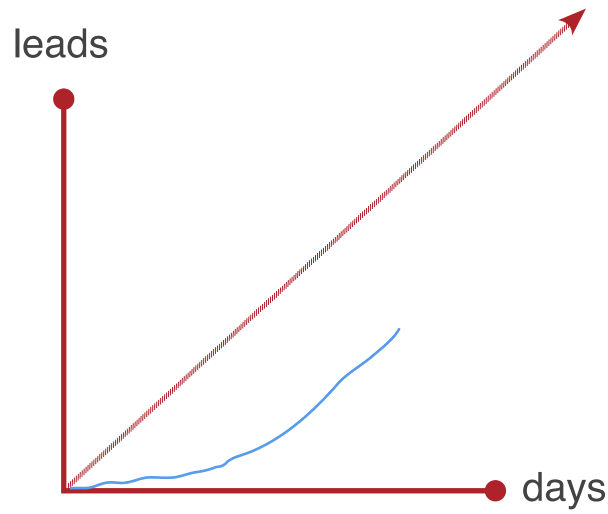
Enter your results every day to plot your progress against the SLA goal. The resulting chart can show you where to focus your marketing team's attention.

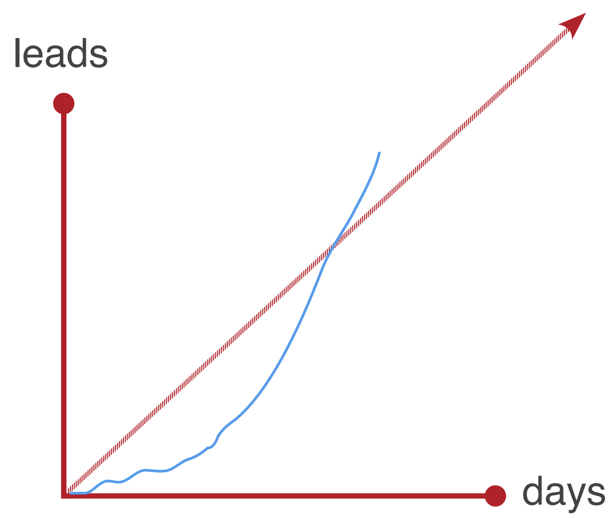
IF LEADS ARE LOW

If actual leads are below the goal, your marketing team must do additional work to deliver on its SLA promises. That might mean developing new content, increasing social media engagement, or spending additional money on PPC or other channels.



IF LEADS ARE ON TRACK

If actual leads are running above the goal, your marketing team has some breathing room and can look ahead to the next month or next quarter. For example, you could start working on next month's campaigns, or hold back a few pieces of content for next month's promotions.

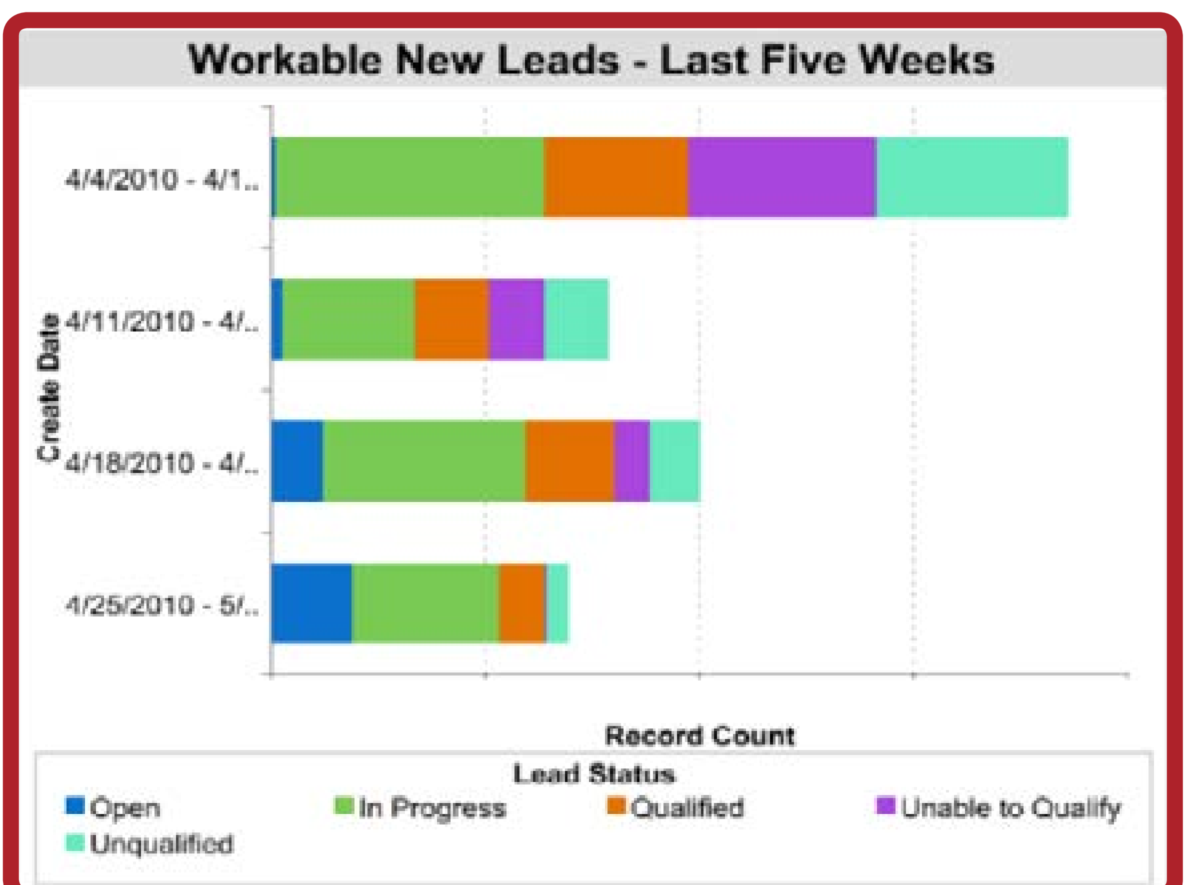


Sales Dashboards

Sales dashboards generally measure follow-up timing and contact attempts. Have your sales manager dig into CRM data to create charts that illustrate whether the sales team is delivering on its SLA goals. Two key dashboards are:

- New leads that were not called within XYZ hours, as specified in the SLA
- All leads that weren't called at least XYZ times within XYZ days

These daily reports will show when specific teams or individual sales reps are falling behind on their goals. That early warning gives sales managers the chance to jump in, diagnose the problem, and provide some coaching that will help the team or the individual get back on track.



Monthly Reports

Dashboards provide a daily update of the most important metrics for your Smarketing team. But you should also create a monthly sales and marketing report that gives a detailed look at your sales and marketing strategies and results.

This monthly report should be shared with the entire company. It creates transparency about sales and marketing activities – but also highlights how your efforts are impacting the entire business. The monthly report should feature charts that quantify the work that sales and marketing does each day.

Marketing Monthly Report

The marketing team's report should illustrate the impact of its recent activities, using a range of charts, including:

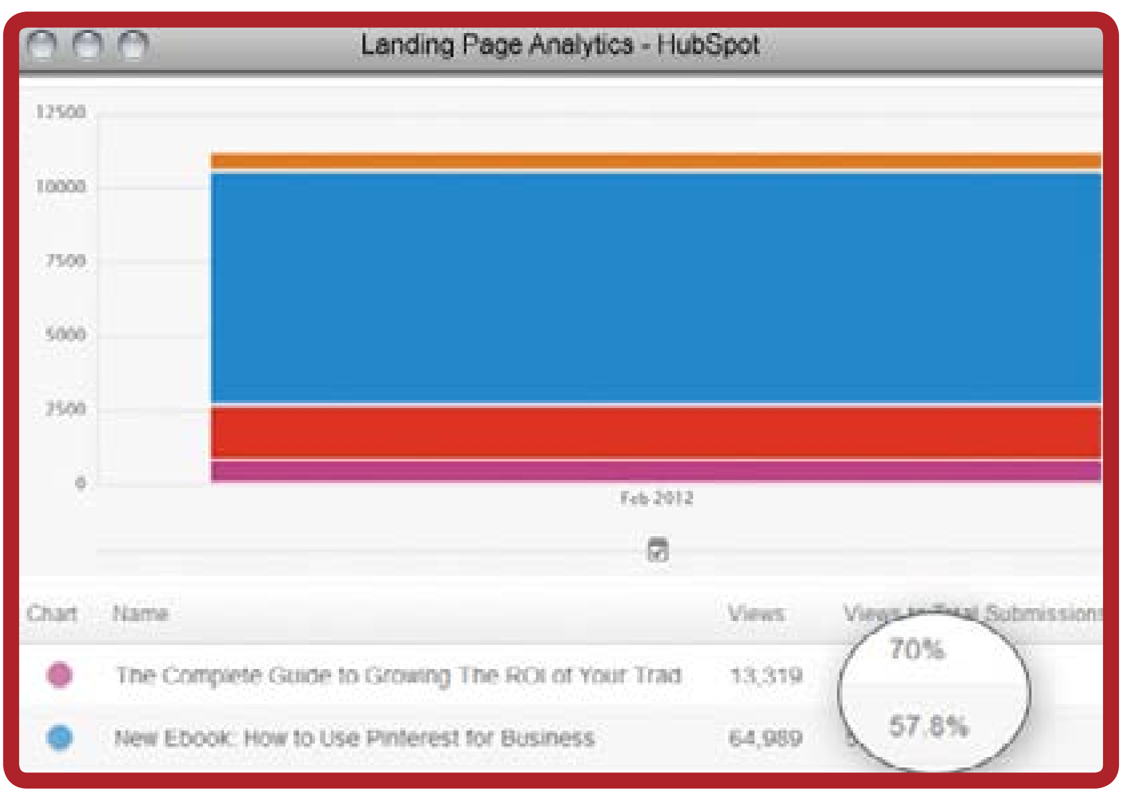
VISITS, LEADS & CUSTOMERS BY SOURCE

Show how your different marketing channels have helped you attract visits, leads and customers. Compare the contributions of organic search, paid initiatives, email marketing, referrals and social media, and evaluate which ones provide the most return on investment. Such insights will help you prioritize efforts in the future. Here is a screenshot of these analytics HubSpot software can give you access to:

PERFORMANCE OF MARKETING ASSETS

Next, look at how your marketing assets--web pages, landing pages, and calls-to-action--are performing. These are the assets your various marketing channels use in order to be successful. In fact, they are the substance of what your sources use to generate more traffic, leads and customers.

In order to evaluate how these assets are performing on a monthly basis, review the conversion rates of your landing page and calls-to-action. Here is an example of what these analytics look like through HubSpot software:



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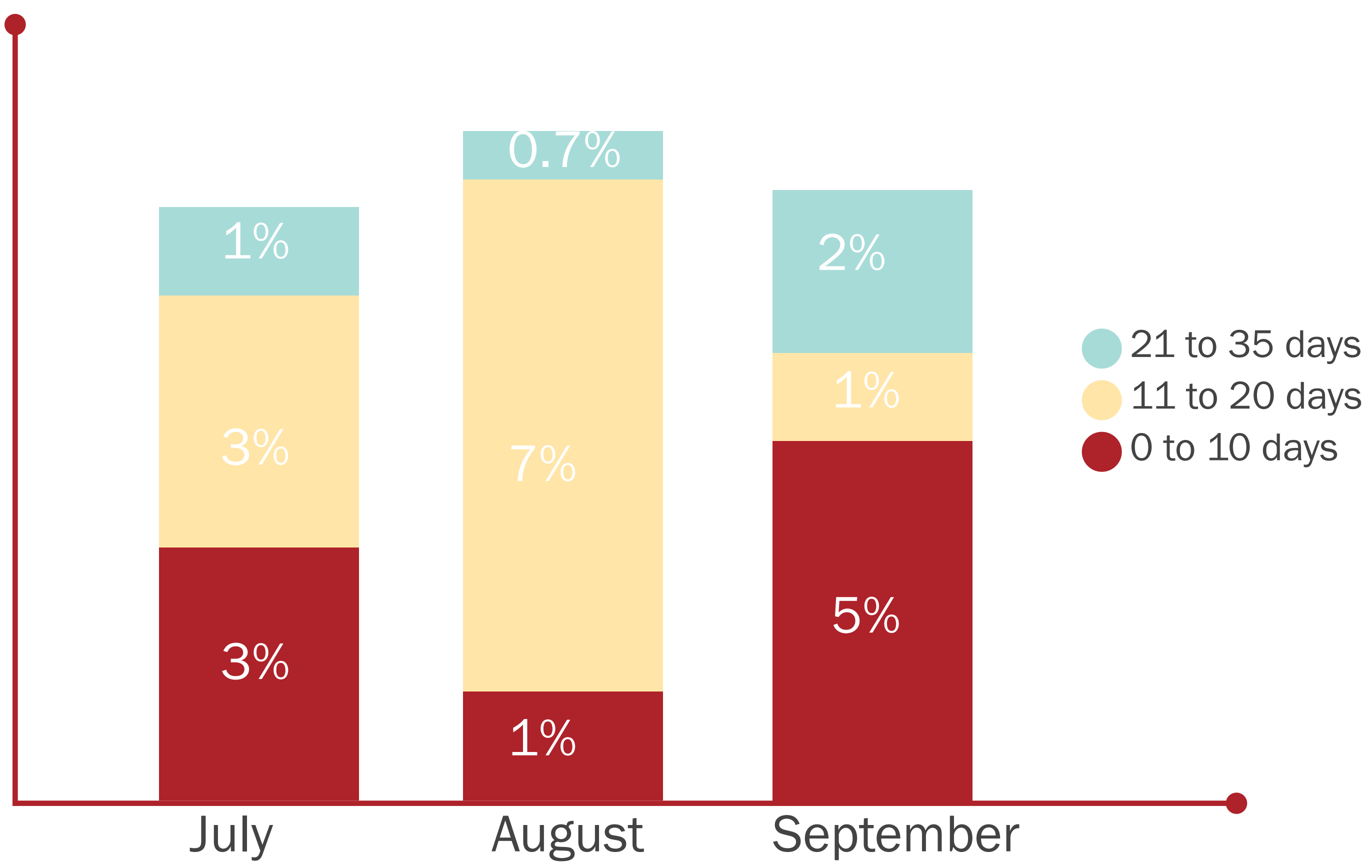
SPEED FROM CONVERSION EVENT TO SALES FOLLOW-UP

If you are a B2B marketer, you should also be aware of how long it takes for a sales person to follow up with a lead. That will give you an idea of how you can speed up the "demo worked" process by creating more high-quality leads and/or ensuring that your sales team is contacting the leads fast enough.

Here is what that chart might look like:



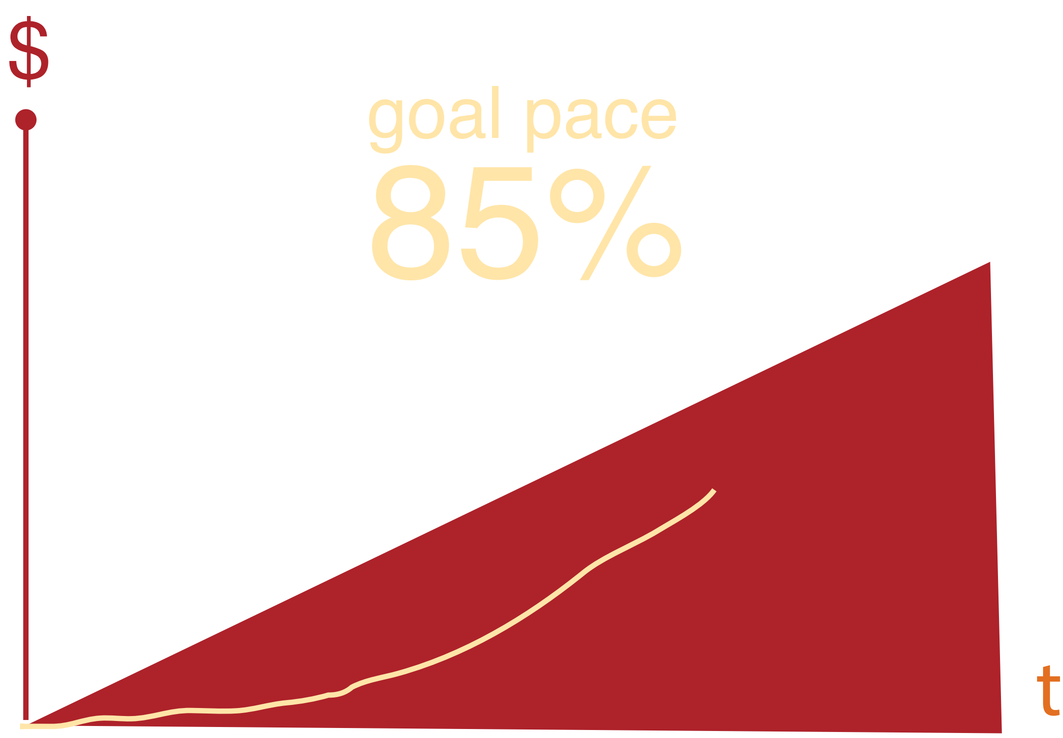
Sales Monthly Reporting

The sales team's monthly report should feature charts that show what's being done with the leads that marketing is generating.

SALES WATERFALL CHART

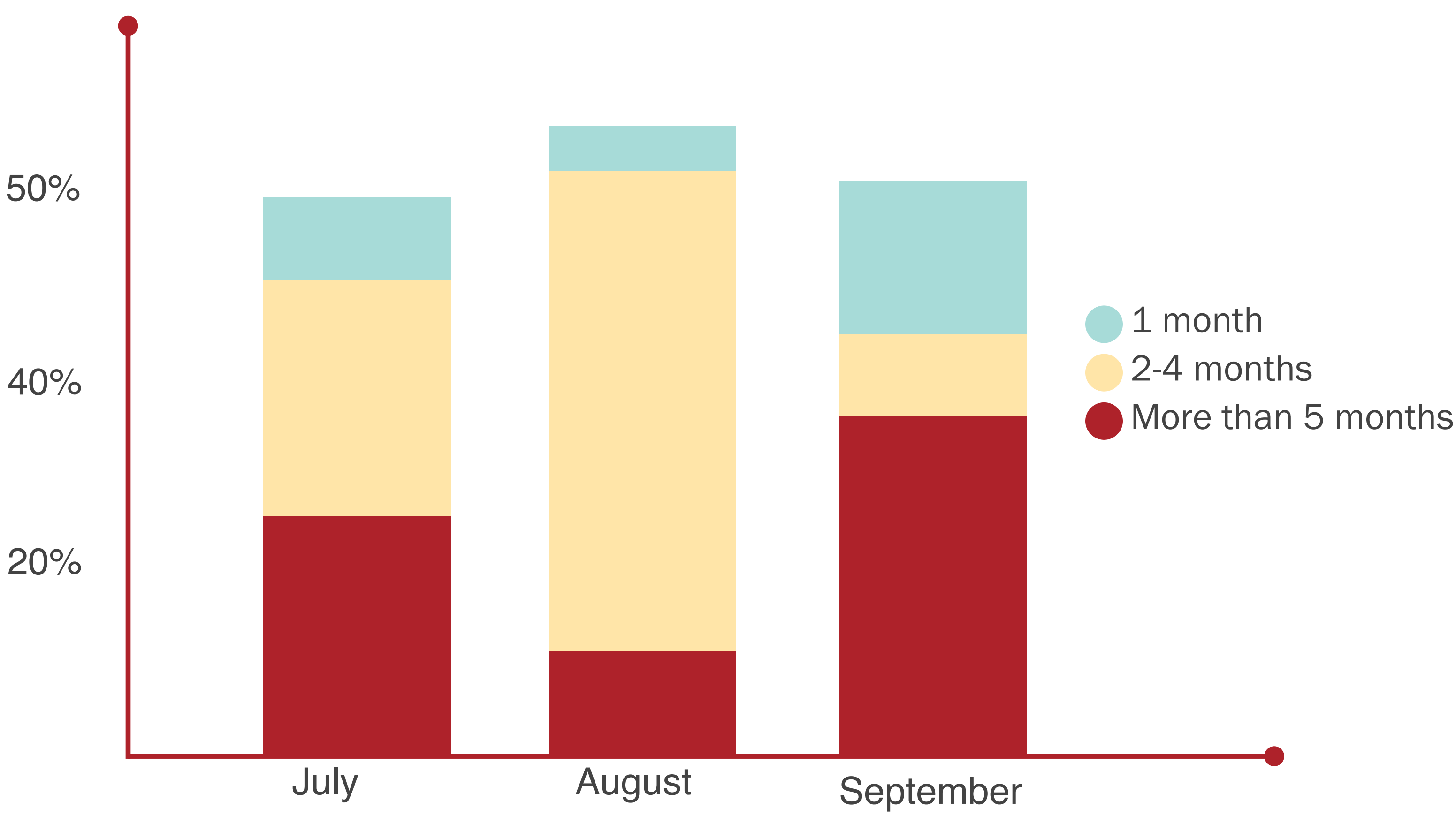
The most important chart look at there is a visualization of actual sales results vs. quota. The chart should show the percentage of the goal that was reached and if there was a gap between the quotas and the monthly goal.

Here is what this chart can look like:



TOTAL SALES CYCLE

It's also important to keep track of how long it takes your sales organization to convert the leads that marketing generated into customers. Monitoring this view will give you a sense of your sales cycle and if you are ever below or above average. Whenever you do nonstandard marketing initiatives, keep a close eye on this chart because it will give you insights into the performance of your efforts from a sales perspective. This view is also tremendously helpful when you slice it across different target personas. You probably are targeting customers with different needs and preferences, you might notice that their sales cycle is drastically different.



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CHAPTER 5

HOW TO HOLD SMARKETING MEETINGS

> *"Regular meetings foster communication and collaboration."*

Another way to get sales and marketing to think like one Smarketing team is to let those two groups actually get together and interact in person. Regular meetings between the two groups foster communication and collaboration, and help sales and marketing managers improve their Smarketing tactics.

You should hold two types of meetings:

- A weekly all-hands Smarketing meeting
- A monthly management meeting
- Weekly Smarketing Meeting

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Get the entire Smarketing team together at least once a week to discuss recent results and upcoming activities. The size of your organization will determine the format of this weekly meeting.

For a company with only a handful of sales and marketing staffers, the Smarketing meeting can be a highly interactive session, welcoming discussion and questions from anyone in the group.

But for a larger company with dozens of marketing and sales staff, the Smarketing meeting should be a fast-paced, high-level overview to keep sales and marketing teams on the same page and moving toward the SLA goals.

Tips for Running Meetings

Here are our recommendations for running a Smarketing meeting:

KEEP IT SHORT

It'll b best if you can keep Smarketing meetings short and to-the-point. If you can keep it to 30-40 minutes, that will be great. Just make sure it doesn't go over an hour.

PICK TIMING CAREFULLY

Hold it at the end of day to avoid disrupting the sales team's prime calling time.

PICK PRESENTERS

Designate one presenter each from Sales and Marketing to deliver their half of the Smarketing update. That update should include current status toward SLA goals, plans for upcoming activities, recent highlights or big wins, and so on.

Think of it more as a performance than a dry presentation of charts and metrics. Look for presenters who can entertain and energize the group while quickly conveying the most important quantitative details.

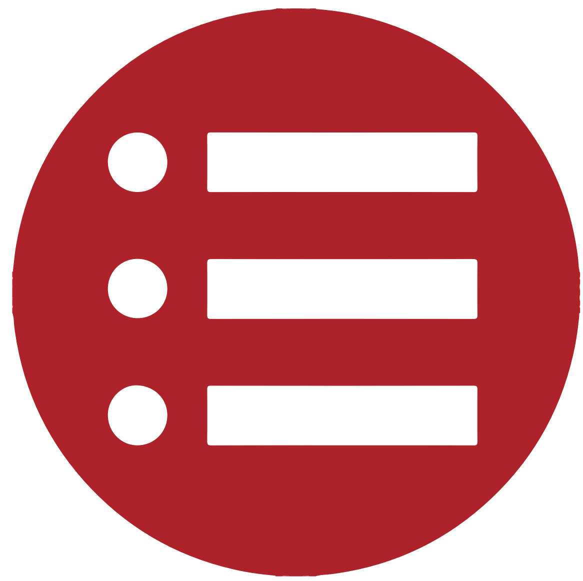
Monthly Management Meetings

The monthly management meeting is an opportunity to take a deep dive into results and to hash out upcoming plans, strategy questions, and any potential problems that may be nudging your sales and marketing teams out of alignment.

Invite three to five key managers from the sales and marketing teams to the monthly meeting, and empower them to work on the issues that affect sales and marketing alignment. In this way, they will forge solid relationships that will help your Smarketing organization scale as you company grows.

Suggested Agenda Items

Agenda items for the monthly management meeting include:



- REVIEW OF METRICS

  Detailed discussion of closed-loop analysis reports and current funnel metrics, so sales and marketing can address any issues related to meeting the requirements of the SLA.

- FUTURE PLANS

  Sharing plans for future marketing or sales projects, and discussion of potential strategy changes.

- DISCUSSION ITEMS

  Resolving disputes between sales and marketing about lead quality or quantity, sales follow-up efforts, the definition of the MQL, or any other important terminology or practices.

CHAPTER 6

OTHER SMARKETING COMMUNICATION

> *“Marketers should think about the sales team as another customer base.”*

Even with an SLA in place, and dashboards and meetings to provide regular updates, marketers still might need other ways to show the sales team how their efforts are helping achieve revenue goals.

In other words, marketers should think about the sales team as another customer base, and try to“market” the role of marketing to that internal audience.

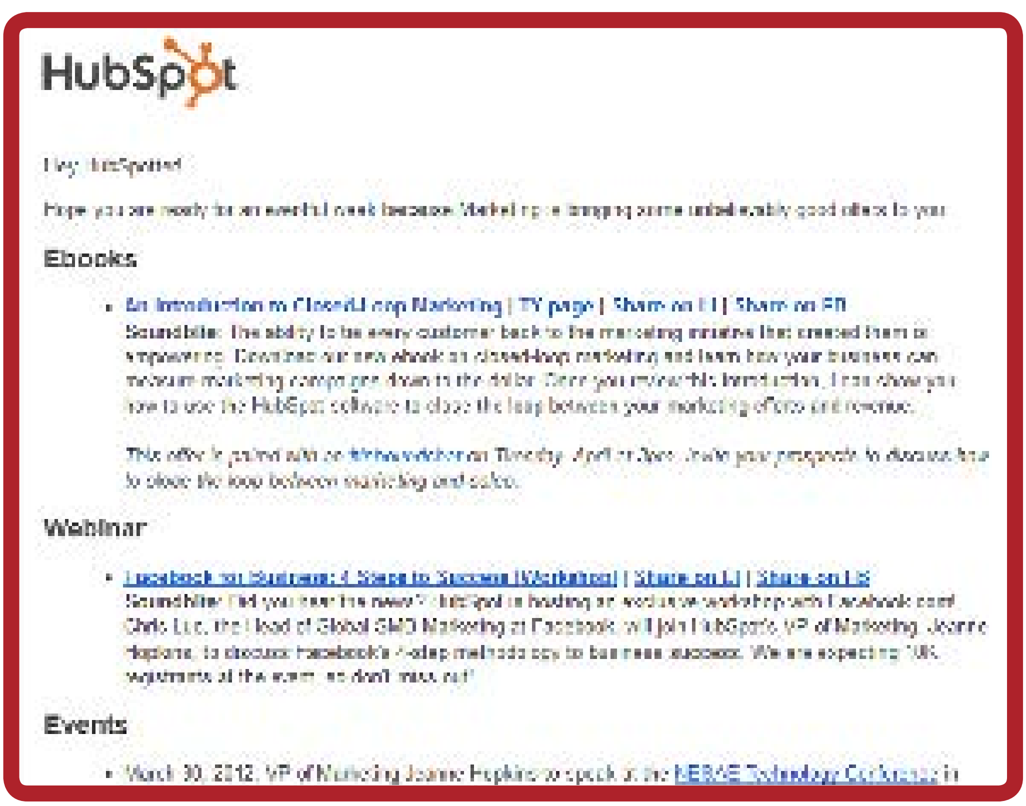
As with any marketing campaign, it helps to tailor your message to the audience’s persona. In the case of the typical salesperson, that’s someone who’s super busy, doesn’t want to be distracted, doesn’t want to read long reports, and needs to know how the information you’re sharing will help them right now.

Types of Communication

Consolidate the information you need to convey to the sales team into simple, weekly newsletter-style reports intended to help them do their job.

WEEKLY MARKETING UPDATE

Weekly marketing updates can consist of a list of weekly planned promotions with short soundbites. This information helps the sales team understand where new leads are coming from, so they can prepare for those contacts.



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WEEKLY PRODUCT UPDATE

If your product or service change often, consider informing your sales team about these changes. Send these weekly email updates from your email marketing platform, so you can track open and clickthrough rates. You'll see which sales reps are reading the updates and which ones are ignoring them. And if you notice overall opens and CTR declining, you know it's time to refresh the newsletter format or tweak information you're sharing to make the report more valuable to the sales team.

Reshuffle Desks

Finally, you can encourage better communication within your Smarketing team by mixing sales and marketing desks together. By sitting next to each other, marketers get to see firsthand how salespeople do their jobs – and whether marketing activities are actually helping them.

Sales reps benefit by having a neighbour they can reach out to with questions about particular leads, or about new marketing campaigns. These informal conversations go a long way toward keeping the entire team happy and productive.

CONCLUSION & ADDITIONAL RESOURCES

> *"Always look for opportunities to modify core elements of your Smarketing strategy."*

One of the best things about this Smarketing framework is that it's scalable. You can tweak elements such as your SLA or the definition of a marketing qualified lead to reflect inevitable changes in your sales and marketing strategy as your company grows.

Always be on the lookout for opportunities to modify the core elements of your Smarketing strategy. For instance, you can develop new reports or filters to generate actionable data that helps your sales and marketing teams. You can also adapt your funnel description and MQL definition to reflect changes in your marketing strategy, customer base and products or services.

You can also revise your SLA to reflect changes in market conditions, customer needs, or the size of the sales staff and marketing staff to ensure that goals are realistic, but aggressive enough to drive revenue and profit growth.

You can also adjust the format of your weekly Smarketing meeting to fit with the size of your organization. You also can invite new managers or other key personnel to the monthly management meeting if your company grows significantly.

Ideally, tracking closed-loop data and holding monthly management meetings will uncover evidence of a growing disconnect between sales and marketing before the system breaks down completely. And as you get more comfortable using data to manage your Smarketing team, you'll find new ways to optimize your campaigns, improve your sales follow-up and generate more revenue – which is the best way to keep everyone in the company happy.

aboutus

We are brand-focused marketing and communications consultants. Henderson Robb works with businesses to help them develop and grow strategically, building awareness for products and services that leads to increased sales.

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