THE POWER OF SMARKETING.
Inbound Certification Class #9
AGENDA

1. What is Smarketing and why it is critical
2. Smarketing = alignment
3. 5 steps to integrate Smarketing into your organization
4. Key takeaways and resources
WHAT IS SMARKETING AND WHY IT IS CRITICAL?
87% of the terms sales & marketing use to describe each other are negative.
SALES
- “simple-minded”
- “incompetent”
- “lazy”

MARKETING
- “arts and crafts”
- “academics”
- “irrelevant”
SALES + MARKETING = SMARKETING.
Two halves of the same team:

Team Revenue
Companies with strong sales & marketing alignment get 

20% annual revenue growth.

2010 STUDY BY THE ABERDEEN GROUP; HTTP://BIT.LY/ZMJQD
2 SMARKETING EQUALS ALIGNMENT.
Get on the same team.

Align both sales and marketing around the same goals and personas.
ALIGNMENT AROUND GOALS

- Having the same or related goals
- (e.g. Marketing Pipeline = Sales Quota)
- Visibility into each other’s goals and progress
- Compensation based on each other’s goals
ALIGNMENT AROUND GOALS
Helps you achieve those goals.

Enterprise Marketing + Enterprise Sales = Money
ALIGNMENT AROUND PERSONAS

• Communicate persona details across the company
• Educate each other about new persona details
• Specialize teams around particular personas
ALIGNMENT AROUND PERSONAS
helps you solve for those personas

Non-Profit Marketing + Non-Profit Sales =
3 FIVE STEPS TO INTEGRATE SMARKETING INTO YOUR ORGANIZATION.
5 STEPS TO INTEGRATE SMARKETING

1. Speak the same language
2. Set up closed-loop reporting
3. Implement a Service Level Agreement
4. Maintain open communication
5. Rely on data
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It all comes down to revenue.
How many marketers have signed up for a number?
Sales is incredibly **numbers-driven**.

Part of getting on the same team is taking on a number with them.
1. Start with your shared goal: REVENUE.
2. Revenue Goal: $10,000
3. Avg. Deal Size: $1,000
   - Current Revenue / Current Customers
4. Customers Needed: 10
   - Revenue Goal / Avg. Deal Size
5. Avg. Lead to Customer %: 2%
   - Current Customers / Current Leads
6. Leads Needed: 500
   - Customers Needed / Avg. Lead to Customer

Work backwards from sales.
Map the **buyer’s journey** to the **lifecycle stages** in the funnel.
Only 45% of businesses have established a company-wide definition of a sales-ready lead.

2009 SURVEY BY MARKETINGSHERRPA. HTTP://BIT.LY/ZL3SF0
SALES
“Marketing leads are terrible quality.”

MARKETING
“Sales doesn’t work our leads.”
What is a sales-ready lead?

A great fit lead with high level of interest.
What is a sales-ready lead?

A great fit lead with high level of interest.

Avoid
What is a sales-ready lead?

A great fit lead with high level of interest.
What is a sales-ready lead?

A great fit lead with high level of interest.

FIT INTEREST

Stimulate Interest

Avoid

Take Orders

INTEREST
## What is a sales-ready lead?

A great fit lead with high level of interest.
What is a sales-ready lead?

A great fit lead with high level of interest.
EXAMPLES OF SALES-READY LEADS

• Contact who **downloaded an ebook** on lead gen, company is 200-1,000 employees and in North America.

• A contact at a company in the US who filled out the form to **request a sales demo** or **started a trial**.

• A contact at a company whose role makes him/her a **decision maker**, e.g. a VP or Director.
Define the handoff process

Owned by Marketing

Owned by Sales
Define your buyer persona

I am a...
Marketing professional that wears multiple hats

<table>
<thead>
<tr>
<th>Internal Notes</th>
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<tr>
<td><strong>Roles</strong></td>
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<td><strong>Goals</strong></td>
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<td><strong>Challenges</strong></td>
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<th>Demographics</th>
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<td><strong>Age</strong></td>
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<td><strong>Education</strong></td>
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<th>Story</th>
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<td><strong>Story</strong></td>
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<td>Mary is a professional marketer at a mid-sized company (26-200 employees). She knows a fair amount about marketing - with expertise in areas such as tradeshows, email marketing, advertising, and sales collateral - but is not a lead generation or analytical marketing guru. She wants to learn about new, more sophisticated marketing techniques, wants her job to be easier, and wants a tool to make her seem smarter and more competent to her boss.</td>
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WHAT HAVE YOU DEFINED?

• Stages of the sales & marketing funnel
• What is a sales-ready lead
• The handoff process from Marketing to Sales
• Buyer personas
5 STEPS TO INTEGRATE SMARKETING

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ARE YOU MISSING CLOSED-LOOP REPORTING?

- Do you send leads to Sales and never hear if they were good?
- Do you end up creating and trying to manage duplicate leads?
- Do you send leads to Sales with the basic contact information without intelligence about what content those leads consumed?
- Are you unsure of the impact your marketing efforts have on revenue?
Closed-Loop Reporting completes the feedback loop between Marketing and Sales.
CLOSED-LOOP REPORTING ALLOWS YOU TO
pass more intel to and get feedback from Sales.

- **Benefits for Marketing**
  - Get up to date contact info and status updates
  - Learn which marketing programs are working and which aren’t
  - Increase Marketing ROI

- **Benefits for Sales**
  - De-duplicate leads
  - Help prioritize leads
  - Help make warmer calls
  - Increase close rate and Sales ROI
CUSTOMERS BY MARKETING SOURCE

Measure how each marketing effort performs through the funnel over time: visits, leads, customers, as well as funnel conversion rates from stage to stage.
CONVERSION ASSISTS

Analyze which content assists in closing customers, and surface that on your website and nurturing.

<table>
<thead>
<tr>
<th>Page</th>
<th>Assists</th>
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<tbody>
<tr>
<td>HubSpot</td>
<td>All-in-one Inbound Marketing Software</td>
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<td>Overview</td>
<td>HubSpot's Inbound Marketing Software</td>
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<td>Inbound Marketing Software</td>
<td>Product Versions &amp; Pricing</td>
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<td>Marketing Tools &amp; Resources</td>
<td>Ebooks, Webinars, Whitepapers by HubSpot</td>
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<td>Internet Marketing Company</td>
<td>221</td>
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<td>All Posts</td>
<td>Inbound Marketing Software Success Stories</td>
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<td>30 Days Free</td>
<td>HubSpot Software Trial Request</td>
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**What are Conversion Assists?**

Listed to the left are the pages on your website and the number of customers who viewed the pages prior to becoming a customer.

Pages with a high assist percentage have one or more of the following going for them:

- Great content that attracts more qualified leads to those pages.
- Great calls to action that help your visitors convert into customers.

**Suggestions**

To improve your lead conversion rates, try these next steps:

- Write more blog posts like your top articles to increase the footprint of your best content.
- Promote your top pages via lead nurturing to attract more of your leads to your best material.
- Align your follow-up emails with your top content. By focusing on the topics covered in your top pages, you'll address what your leads care about most.
CLOSED-LOOP LEAD INTELLIGENCE
Follow the interactions and conversion path of a particular contact, from the content they download, the emails they click, and other changes.
CLOSED LOOP CRM INTEGRATION

Share interaction highlights with your sales team, make it easy for them to leverage lead intelligence, and get data on if leads convert to customers.

<table>
<thead>
<tr>
<th>Lead Detail</th>
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<tbody>
<tr>
<td><strong>Lead Owner</strong></td>
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<tr>
<td><strong>Name</strong></td>
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<tr>
<td><strong>Title</strong></td>
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<tr>
<td><strong>Company</strong></td>
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<tr>
<td><strong>Record ID</strong></td>
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<tr>
<td><strong>Partner</strong></td>
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<td><strong>Partner Account</strong></td>
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<td><strong>Time Zone</strong></td>
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<td><strong>Visit</strong></td>
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<td><strong>Page Views</strong></td>
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<td><strong>Submissions</strong></td>
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**HubSpot Intelligence**
- Generate more leads from Facebook for VIP
- HSCTM-toucance-comarcmketing-leaddistribution-ebook-
  20130611
- Free Ebook: How to Generate Leads Using Facebook
- Last Viewed: 5 hours ago
- Last Seen: 7 months ago through:
  1. 20 Marketing Trends and Predictions for 2013 and Beyond
  2. organic search through hubspot

**HubSpot Score:** 58

**Scheduled Emails**
- Contact does not have any future emails scheduled
- Enroll in Workflow: Contact is enrolled in 1 workflow
CLOSED-LOOP LEAD ALERTS

Send automatic updates to your sales team when their leads revisit the website or take other key actions, to make sure to follow up at the best time.

One of your leads came back to hubspot.com.
Let's get busy.

Paula Yakubik
paula@massmediacc.com
View this contact
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定义服务级别协议

定义

定义销售-营销服务级别协议（SLA）定义了每个团队承诺支持对方所要完成的任务。
An SLA crystalizes the alignment around goals.
SLAs GO BOTH WAYS.

MARKETING → SALES
Number and quality of leads required to hit company revenue goals.

SALES → MARKETING
Speed and depth of lead follow-up that makes economic sense.
CALCULATING THE SLA

MARKETING ➔ SALES

How many leads of a certain quality does a sales rep need to make quota?

- Quota (revenue) / avg. revenue per customer = \# customers needed
- Customers / avg. lead to customer close % = \# leads needed
- May vary by type (quality) of lead
CALCULATING THE SLA

SALES ➔ MARKETING

How many call/email attempts to engage should a sales rep make to every lead to not waste leads?

With $X$ leads and $Y$ hours/month, how many follow-up attempts should a sales rep be able to complete per lead?
EXAMPLE SLAs

• Marketing will deliver 100 leads per sales representative, per month.

• Sales will make 1 attempt to engage in 4 business hours, with 5 attempts in 14 days.
TRACK SLA PROGRESS DAILY
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WEEKLY SMARKETING MEETING

Your entire Sales and Marketing teams attend to get on the same page about: team successes, product info, persona education, SLA waterfalls.
MONTHLY MANAGEMENT MEETING

Key managers attend to discuss topics in depth and resolve issues.
Hi Eliora,

I hope you’ve all recovered from the holiday party and are ready to rock it with marketing offers after rocking with DJ Nick Sal. Going forth, I’m going to share offers that were recently launched as well as some upcoming this week, in order to keep you in the complete marketing loop.

RECENTLY LAUNCHED OFFERS

- **27 Pre-Designed Calls-to-Action for Your Customization**

  Assets: Landing Page, Thank You Page, Email

  Launch Date: Jan. 10

  Product Focus: CTA Tool

  Soundsbite: Changing the design of your calls-to-action can improve clickthrough rate by 1309%, or more. To help you see such success, we’ve built 27 pre-designed CTA buttons in PowerPoint for you to customize and use! Afterwards, I’m happy to show you how you can use HubSpot’s CTA tool to start collecting performance metrics for this CTAs.

  [Tweet this Offer] [Share on Facebook] [Share on LinkedIn]

EVENTS

- CMO Mike Volpe to speak for Boston Product Marketing Association in Boston, MA on Jan. 17, 2013.

LOCAL HUBSPOT USER GROUPS

Are you leveraging local HubSpot user group (HUG) meetings to close deals? Here are some great new opportunities:

- **Indianapolis**: January 16
- **Montreal**: January 16
- **Chicago**: January 30
Hi Elisa,

You were looking pretty fly on Friday night. The only way you could look any better would be to explain all of this week’s new product features on the spot. Read on and I bet you could :)

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**PRODUCT COMMUNICATION**

Share updates about products and services – arm the sales team with the details and why customers/prospects will care.
Communication isn’t just meetings.
Communication isn’t just bullet points.
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USE DASHBOARDS
Create and share a common dashboard with the reports aligned with the teams’ goals. Check the dashboard daily and encourage individuals to fix problems.
MARKETING DASHBOARDS

Measure and communicate progress towards primary goals as agreed upon in the SLA.
MARKETING DASHBOARDS

Measure volume of leads or volume of quality leads against the monthly goal, and check daily to adjust.
TRACK LEADS BY SOURCE

Set goals per source and measure progress for each of your efforts.
TRACK LEADS BY CAMPAIGN

Analyze the results for each campaign – which efforts successfully drive traffic, leads, and customers.
TRACK THE VOLUME OF MQLs

Measure how many MQLs – and which types – are generated.
MONTHLY MARKETING REPORT

Do a full analysis on a monthly basis to dig into all the important metrics and evaluate why Marketing did or did not hit targets. Share it across the company.
SALES BY DAY DASHBOARD

Measure progress towards the sales goal and compare against previous month.

goal pace

85%
SALES ACTIVITY REPORTS
Track how many and how deeply leads are worked by the sales team.

Leads Worked by Month

# Lead Attempts for Leads Last Week
What to do when things go **wrong**.
Rely on data, not emotions.
Separate reality from perception.
What did you do the last time something went **wrong**?
Remember, you’re in the same boat.

Use data to figure out what’s wrong and how to fix it.
4 KEY TAKEAWAYS AND RESOURCES.
KEY TAKEAWAYS

SMarketing.

alignment between sales and marketing around goals and personas.
KEY TAKEAWAYS

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RESOURCES

1. How to calculate an SLA [blog post]
2. Sales & marketing metrics [blog post]
3. Intro to closed-loop reporting [eBook]
4. Calculate smarketing SLA goals [downloadable template]
5. Plan annual goals [downloadable template]