



MIND THE GAP...BETWEEN SALES AND MARKETING

 Better Marketing. Better Sales. Better Business.



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Welcome

INTRODUCTION

Closing the Divide Between Sales and Marketing Through Data, Collaboration and Communication

Sales: "These leads from marketing are rubbish. They aren't qualified and they aren't interested in buying right now. How are we supposed to generate any business with this lot?"

Marketing: "Sales are so full of it. They're telling us that the leads we've generated for them are crummy. We've done our job, they're the ones that can't do what they're paid to do and close the darn deal!"

Sound familiar?

So often we come across sales and marketing teams that play the "blame game" for bad business. It's a damaging divide, considering the powerhouse these teams are capable of being when working together as opposed to against one another. In fact, a study by Forrester showed that sales and marketing teams with good alignment

achieved 25% increase in quota achievement, 15% increase in win rate, and 27% faster three-year profit growth.

HubSpot reports **36% higher customer retention, 38% higher sales win rates and up to 67% more chance of deals being closed successfully**, thanks to an alignment of Sales and Marketing.

Creating a solid, lasting partnership between sales and marketing requires a strategic approach that treats the two teams as a single, revenue-generating organisation. Sales and marketing are essentially critical partners in the business – not adversaries – and if we are to reap the benefits of strong alignment of these teams we need to implement a framework of data-driven tools and practices that help the guys 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 to see.

In this eBook we offer 6 actionable steps to merge sales and marketing departments into a unified revenue-focused team, working together towards business objectives.

Chapter One

STEP 1: SET UP CLOSED-LOOP REPORTING

For any level of understanding and alignment to be reached between sales and marketing, both teams need to consider data as the 'indisputable ties that bind'. Data has no emotion, is objective and can only be determined by actual events. This helps keep things in perspective for both teams, allowing them to monitor progress towards goals, analyse lead quality and measure marketing ROI.

It's All About the Data

For any level of understanding and alignment to be reached between sales and marketing, both teams need to consider data as the 'indisputable ties that bind'. Data has no emotion, is objective and can only be determined by actual events. This helps keep things in perspective for both teams, allowing them to monitor progress towards goals, analyse lead quality and measure marketing ROI.

The first step to effective collaboration is establishing a closed-loop reporting system that tracks metrics key to both marketing and sales.

The two key pieces of this system are:

- **Marketing software that aids lead generation and management.**
- **A customer relationship management (CRM) system that lets you track and measure sales activities.**

Share and Share Alike

We partner with PandaDoc, a leader in document automation, to help the sales team reduce the time it takes to create customised proposal documents and get those documents executed by their clients.

In order to build holistic reports that provide accurate insight into closing rate and new customers from marketing generated leads, your marketing software and CRM system needs to be integrated to share data on every lead from creation to opportunity stage to close.

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.

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

- **Automatic, two-way synchronisation between the marketing platform and your CRM.**
- **Lead matching on email address for de-duplication. New tracking information should be used to update existing records, not create duplicates.**
- **Access CRM information from the marketing software in order to segment leads based on leads and contact information added by the sales team.**

The act of sharing information from sales to marketing and vice versa allows for greater understanding, deeper insights and is conducive to improved performance for both teams.

What Should Marketing Share with Sales?

Complete Lead Intelligence

Complete lead intelligence, including the history of each lead's activity on the website: campaign engagement, download history, and social media presence. Appending these details to each lead record helps sales representatives personalise their follow-up strategy for each lead based on their specific areas of interest and historical activity.

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.

What Should Sales Share with Marketing?

Contact Touches

Records of communication touch points such as email, 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.

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.

See examples over the next pages of data sharing between HubSpot marketing software and Salesforce.com CRM.

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Mike Volpe

Timeline

First Seen: Mar 9, 2011

Interactions: 143

Lifecycle Stage: Lead (Since Jan 2, 2012)

August

- HubSpot Breaks World Record For Largest Webinar (Tue Aug 14, 2012 at 1:28pm)
- How to Use Pinterest for Business (Mon Aug 6, 2012 at 8:58am)
- Synced 32 Properties to Salesforce (Thu Aug 2, 2012 at 9:07am)

July

- New Ebook! 56 Downloads (Tue Jul 10, 2012 at 8:44am)
- How to Generate More Leads (Wed Jul 4, 2012 at 5:48pm)
- Completed workflow (Mon Jul 1, 2012 at 9:11am)

CONTACT DETAILS

- Timeline
- Contact
- Company
- Marketing Grader
- Social Media
- Salesforce
- Analytics
- Email

Mike Volpe

Lead

Post | File | Link

Write something...

Share

Followers: No followers.

Sort by: Post Date

Lead Details

Lead Owner: Ted Ammon (Channel)

Current Owner: Mike Volpe

Name: Mike Volpe

Title: hubspot

Record ID: 0007000000gh1Cs

Record ID (18): 0007000000gh1CsEAK

Partner: Ted Ammon

Partner Account: EST

Description:

Lead Status: Open

Reopened: ☐

Reason:

Best Lead Reason: Website: <http://www.hubspot.com>

Int'l Domain Suffix: com

Phone: 6465912631

Email: mvolpe@hubspot.com

Role: Sales

Emailing Allowed: TRUE

Email Opt Out: ☐

HubSpot

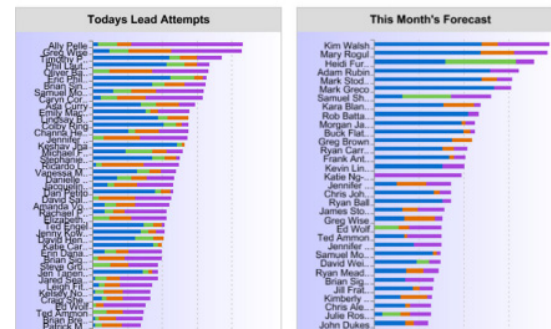
One of your leads came back to offers.hubspot.com.

Jeff Russo

Email: jrusso@hubspot.com

Company: HubSpot

[View in HubSpot](#) [View in Salesforce](#)



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 analyse 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 optimise your marketing mix and focus on the channels that are delivering the best conversion metrics.

Identify Winning Marketing Assets

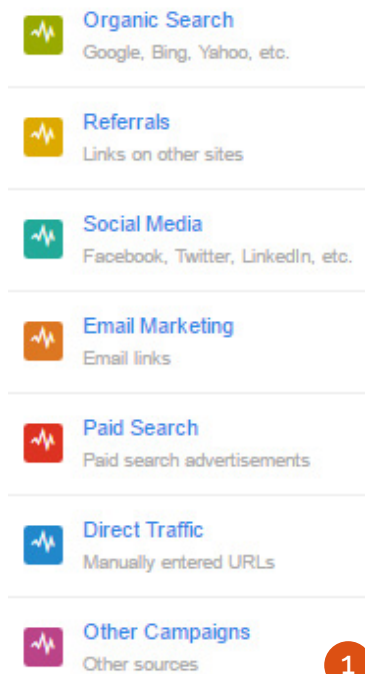
Trace each customer back to the source of their first visit to your website – e.g. paid search, organic search, social media, or email marketing. You also can analyse each channel for other key metrics, such as:

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. (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 optimise your site to promote more influential pages.





1

● Figure - 1 - Identify Winning Marketing Channels

● Figure - 2 - Standard / Cumulative growth per Channel

● Figure - 3 - Identify Winning Marketing Assets

Landing Pages Discovery

All landing pages All campaigns Search

Overview

| Link | Clicks | Visits | Visits % | Visits rate | Visits rate % | Visits rate % | Updated |
|---------------------|--------|--------|----------|-------------|---------------|---------------|---------|
| First to make sense | 40,38 | 21,34 | 64.5% | 1,887 | 4.9% | Aug 28 | |
| First to make sense | 55,68 | 21,24 | 68.5% | 1,486 | 4.2% | Sep 12 | |
| at Home Remover | 15,68 | 6,245 | 67.8% | 700 | 4.5% | Sep 5 | |
| 10... Trends Card | 12,68 | 7,389 | 61.5% | 202 | 2.2% | Sep 5 | |
| The internet search | 6,466 | 4,323 | 54.5% | 401 | 5.4% | Sep 14 | |
| International - Reg | 6,261 | 3,335 | 68.0% | 105 | 1.7% | Sep 11 | |

Create A Landing Page

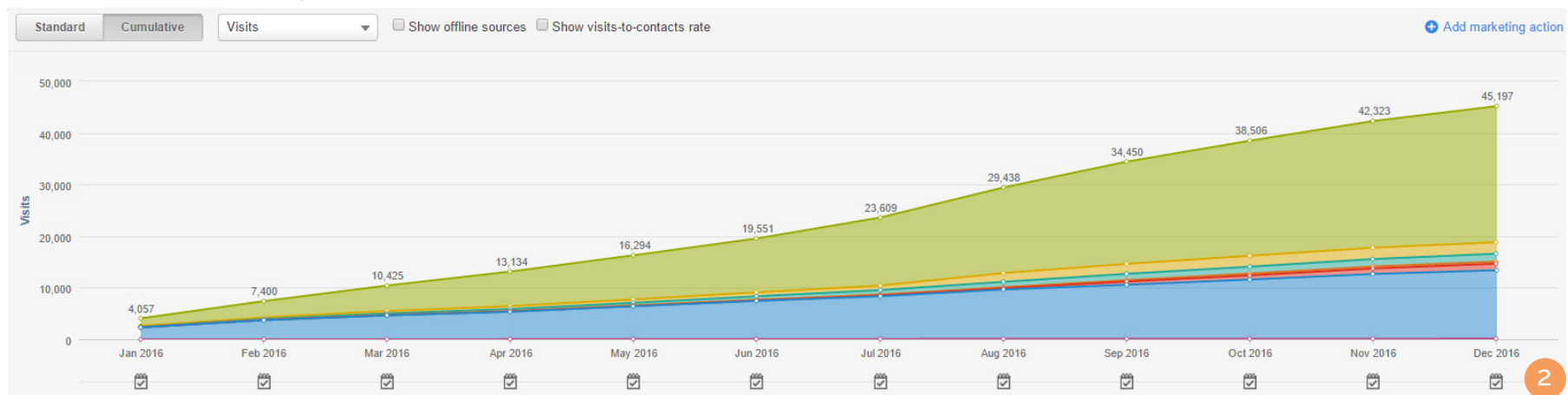
How to Make Marketing People Love - Responsive

Conversion Assists Tubalid Tisa

All Pages Viewed By Customers This month

| Page | Customers who viewed this page |
|---|--------------------------------|
| HubSpot, All-in-One Marketing software http://www.hubspot.com/ | 50 |
| Phong http://www.hubspot.com/zh-CN | 39 |
| Internet Marketing Software Products http://www.hubspot.com/products | 39 |
| Inbound Marketing Software Success Stories Customer Case S... http://www.hubspot.com/customer-case-studies | 26 |
| Internet Marketing Company http://www.hubspot.com/internet-marketing-company | 23 |
| Partners http://www.hubspot.com/partners | 23 |

3

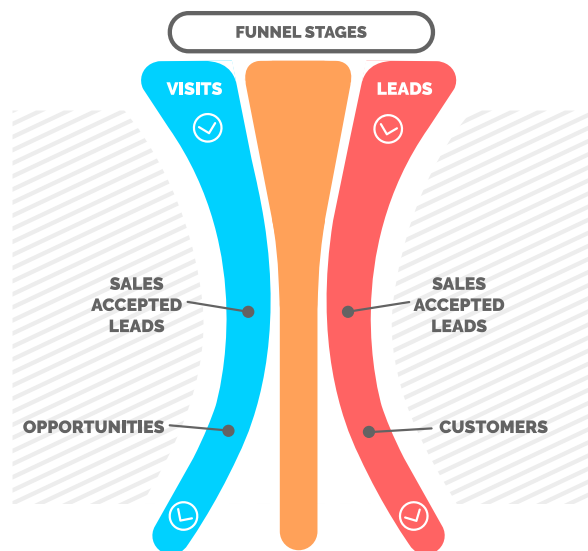


Chapter Two

STEP 2: DEFINE YOUR FUNNEL

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

To align sales and marketing, the teams must have a consolidated view of the funnel and standard definitions of each stage in the process. A typical funnel may look something like this:



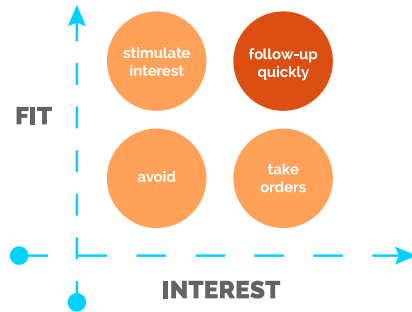
Understand Lead Quality

To have a mutual understanding of the funnel, it is imperative that both teams agree on the definitions of the stages - and most importantly the stage where marketing hand-off leads to sales. Every company's definitions will differ 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 salesperson.

Aspects of Lead Qualification

As any sales person will attest - not all leads are created equal. Lead qualification is an important part of the sales process. Qualification allows marketing and sales teams to determine the best way forward with a lead. The matrix below identifies 4 lead types and provides marketing and sales with sufficient information to direct the next action that should be taken with the leads.

The matrix considers two elements in lead qualification: fit and interest.



Is the Lead a Good Fit for Your Business?

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 matches your ideal customer profile will determine whether and when you hand it over to the sales team.

Is the Lead Interested in Your Products or Services?

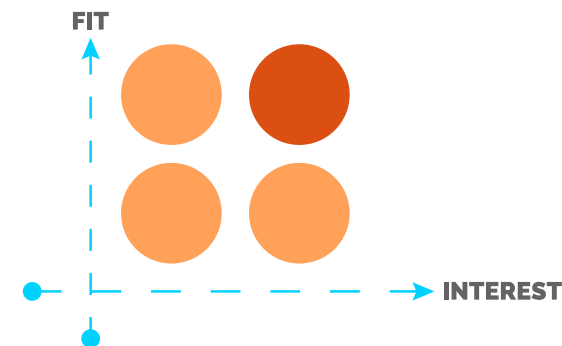
A lead's activity can reveal how close they are to a buying decision. For example, if a lead has only visited your website once, or has just begun following you on

Twitter, they may be aware of your company but are not particularly engaged. A lead that requests a demo or views pricing information is signaling a genuine interest, further along in the buying cycle.

Where a lead falls within the four quadrants of the matrix will determine the next step your marketing or sales team take.

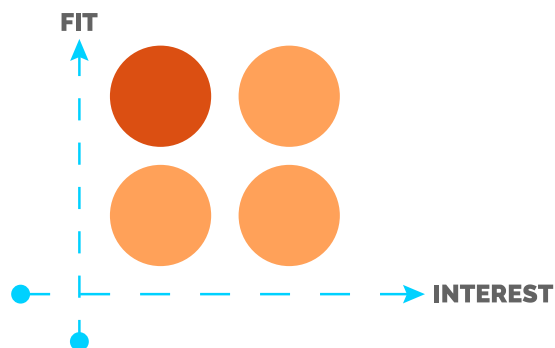
Good Fit and High Interest

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



Good Fit but Low Interest

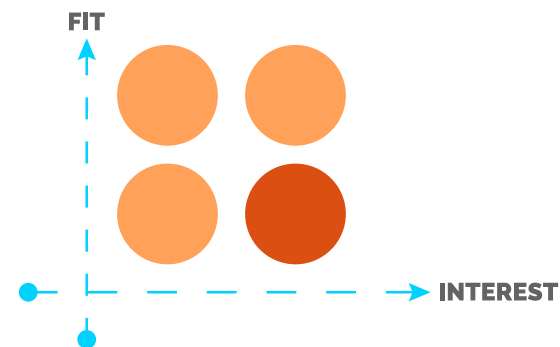
Leads in the upper left quadrant are a good fit for your company but don't show much interest yet. They may have signed up for an email newsletter or downloaded a piece of educational content. These are leads that require further nurturing from marketing.



High Interest but Not a Good Fit

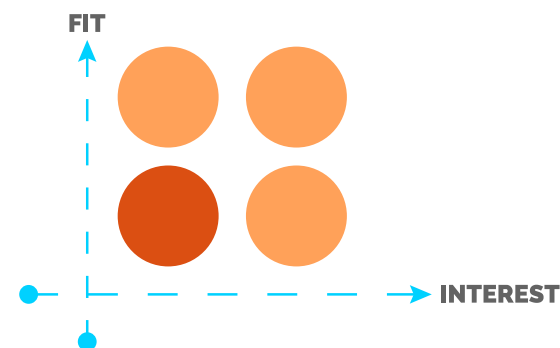
Leads in the lower right don't necessarily fit your ideal customer profile, but are highly engaged with your brand. They might have subscribed to your blog and email newsletter, downloaded your eBooks and attended your webinars. It's worth having a sales consultant do a low-cost follow-up with these 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 shouldn't automate the entire sales and marketing process. At some point, a good marketer or sales representative can spot an opportunity that your systems might overlook.



Little Interest and Not a 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 better results.



Develop Your Definition of Qualified Leads (MQL/SQL)

Using the fit/interest matrix as your guide, develop your teams' definition of a Market Qualified Lead (MQL) or Sales Qualified Lead (SQL) that's right for your company. For some businesses, it may make sense to focus on the fit as they have a tightly defined market, while others may have a broad customer base and focus more on interest level. That decision depends entirely on your business model.

Examples of 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 your geographical preference with more than 5,000 employees.**
- **A contact with the right title or role 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.

The important point is that both your marketing and sales teams agree on what the definition of an MQL or SQL is and at what stage of the buyer's funnel to engage them.

HubSpot defines an MQL as:

- **People who have expressed interest and identified themselves by being deeply engaged. They are sales-ready contacts but have not yet become full-fledged opportunities.**

- **Promotion of these leads to MQL stage may be achieved by triggering form completion with content such as demo requests, buying guides, etc.**

HubSpot defines an SQL as:

- **These are leads that your Sales team has accepted as worthy of a direct sales follow up.**
- **This stage helps your teams stay on the same page concerning quality and volume of leads that are handed over to sales.**

Scoring Your Leads

Once you have a solid understanding of what a marketing qualified lead looks like for your company, you'll want to translate the definition into metrics that you can use with your lead scoring or lead grading programme to assign value to each lead. Using a lead scoring or grading programme that relies on data from your closed-loop analysis can help you determine the 'value' of different activities, qualities or engagements from a lead qualification perspective.

The image shows two examples of lead scoring rules in HubSpot. The top rule is titled '+ 20' and states: 'The contact property Area of Business Operations is equal to United Kingdom.' Below this is an 'and...' button. The bottom rule is titled '+ 5' and states: 'Contact has visited a URL containing http://www.struto.co.uk/ at least 3 times.' Below this is also an 'and...' button. Both rules have a settings gear icon in the top right corner.

Examine Behavioural History

Examine the activity history of recent customers and analyse 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. This will give you an idea to benchmark potential customers by

Uncover Patterns

Look for patterns 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 analyse 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 Three

STEP 3: COLLATERAL CONTENT

The importance of collateral content cannot be stressed any more. Marketing providing Sales with the correct content to serve prospects at the right time, no matter the stage they may be on in their buying journey, is crucial.

Marketing supplying lead intelligence and lead alerts is just one aspect of the content that needs to be put forward to Sales, collateral content is necessary in the lead nurturing process, to identify how ready a prospect is for a certain (and corresponding) action.

Primarily, your sales enablement content strategy revolves around a full content audit. Fortunately, your company may already have high quality sales content on hand or featured on your site, making the content audit process a simple affair. Ensure that this content is hosted in a central location.

By centralising your content in one location, your Sales team may find your resources faster – making the procedure as painstakingly fluid as possible.

Creating Sales Enablement collateral generally revolves around content such as:

- **Whitepapers / eBooks**
- **Product demos**
- **Competitive intelligence briefs**
- **Important pricing or discount documents**
- **Case studies / testimonials**

Delivering on these collaterals not only enables Sales to put forth value to a prospect, but further legitimises the brand as an industry leader, giving them a sneak peek into who your company is and why you do what you do.

The flow of content between Marketing and Sales

Ideally, Marketing should have a beautiful, on brand deck, created to serve at the correct stage of the buying funnel. These collaterals should be created with input from the Sales team, as it will help marketing create content that the lead will find valuable and that serves the appropriate stage. A fundamental understanding of the buying funnel will be crucial in your marketing team delivering the most accurate content.



Chapter Four

STEP 4: ESTABLISH AN SLA BETWEEN MARKETING AND SALES

The MQL definition is the centre piece of another critical element in the strategy of alignment between the sales and marketing teams and that is the service-level agreement (SLA).

The objective of the SLA - unsurprisingly - is to formalise 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 deliver 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.

The Marketing SLA

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 – monetary value!

How to Calculate SLA in Monetary Terms

To calculate an SLA in monetary terms first note the percentage of the sales quota that marketing is responsible for each month. Then, calculate the value of each MQL to determine how many leads marketing must deliver to reach that total.

Don't worry, no need to dust off the Statistics 101 manual, we've got you covered in these 3 simple steps:

1. **Campaign Conversions:** Create a list of all the different campaigns or offers that have generated leads in your pipeline – such as white paper downloads, demo requests and trade shows. If applicable, feel free to segment your leads by type of customer, such as enterprise vs. mid-sized and small business.
2. **Campaign Revenue:** 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, then calculate the average revenue per large vs. mid-sized or small customer separately.)
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%, then the value for each whitepaper MQL is $\$160,000 \times 1\% = \$1,600$.

Using these figures, we are now able to establish an SLA that deals with leads in monetary values. An example statement may be: Marketing will deliver MQLs to the value of \$200,000 per month.

| 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 |

The Sales SLA

To set up the SLA for the sales team, consider the following questions.

- **How quickly should a sales representative 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?**

Base 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 for example. Even though your chances of successful connection increase each time you call a lead, those calls also have a cost associated with them being 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 uncover that optimal number:

Start with Stale Leads: Select a portion of leads that have been in the pipeline for at least a few months.

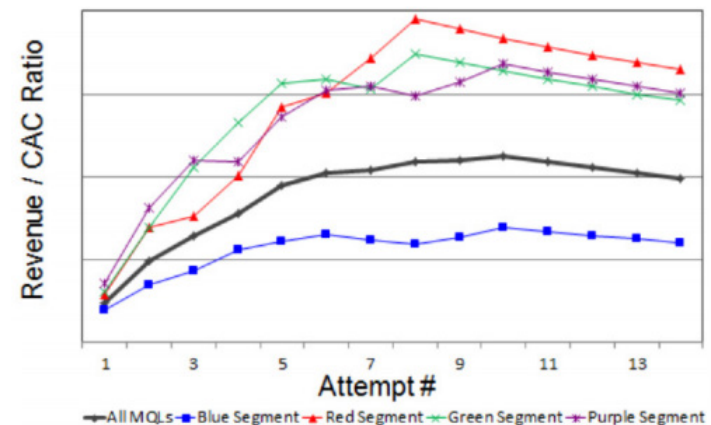
Group Data: Look at your CRM records to determine how many times the sales team attempted to contact each of those leads before closing. Create cohorts of leads that were contacted once, twice, three times, four times and so on.

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.

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. 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.

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 Mark Roberge, HubSpot's SVP of Sales. The colored lines represent the results for different types of leads in the HubSpot 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 Five

STEP 5 : INCORPORATE DASHBOARDS AND REPORTING

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.

Dashboards are valuable tools in keeping progress in check and helping teams review overall performance on an ongoing basis.

Using Dashboards for Daily Data

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 sales and marketing 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 keep your team meet (and exceed) their goals.

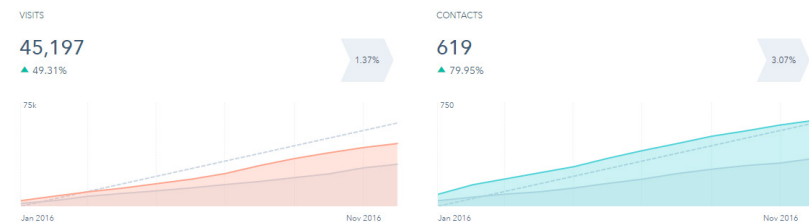
Marketers and salespeople are less likely to fall behind if they know that the rest of the team will see their numbers every day. And if people do fall behind, they're more motivated to fix problems on their own.

Marketing Dashboard

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

If you're a HubSpot customer, you needn't do a thing, the software does it all for you and results can be seen on your Dashboard.

Marketing Performance ©



If Leads are Low

If 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 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 Dashboard

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.

Mastering Monthly Reports

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

This monthly report should be shared with the entire company. It not only 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.

Getting Around the Table

Another way to get sales and marketing to think as a cohesive 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 combined tactics.

You should hold two types of meetings:

- **A weekly all-hands meeting for all sales and marketing team members**
- **A monthly management meeting for Sales and Marketing Managers**

The Weekly Meeting

Get the sales and marketing teams together at least once a week to discuss recent results and upcoming activities. The size of your organisation will determine the format of this weekly meeting.

For a company with only a handful of sales and marketing staffers, the 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 meeting should be a fast-paced, high-level overview to keep the teams on the same page and moving toward the SLA goals.

Tips for Running Meetings

Here are some tips for holding weekly meetings, most especially for larger teams.

Keep it Short

It's best if you can keep the weekly meetings short and to-the-point, around 30-40 minutes duration is ideal. Just make sure it doesn't go over an hour.



Choose the Time Carefully

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

Pick Proper Presenters

Designate one presenter each from sales and marketing to deliver their side of the update. The 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 energise the group while quickly conveying the most important quantitative details.

The Monthly Management Meeting

This meeting provides 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.

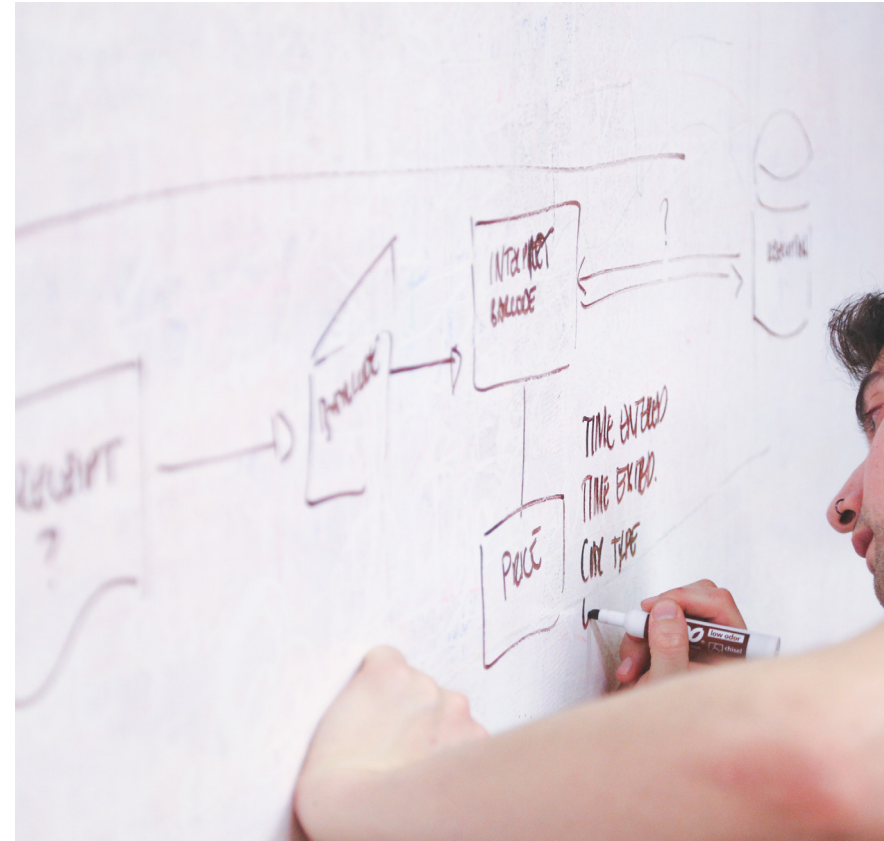
Invite key managers from the sales and marketing teams to the monthly meeting, and empower them to work on the issues that affect sales and marketing alignment. In this way, they will forge solid relationships that will help alignment objectives scale as the company grows.

Suggested agenda items 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 other important terminology or practices.



Chapter Six

STEP 6 : KEEP COMMUNICATION CHANNELS OPEN

Even with an SLA in place, daily dashboards and regular meetings to provide 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 aim 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. Two such reports could be:

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.

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 click-through 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.

Up Close and Personal

Finally, you can encourage better communication between marketing and sales teams by getting the teams together - literally. By rearranging office layout to have the teams sitting next to each other, marketers get to see (and hear) 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.



Chapter Seven

WRAP UP

One of the best things about this aligned 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 alignment 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.

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

Test the format of your weekly meetings to find a style that fits with the size of your organisation. You also can invite new managers or other key personnel to the monthly management meeting if your company grows significantly.

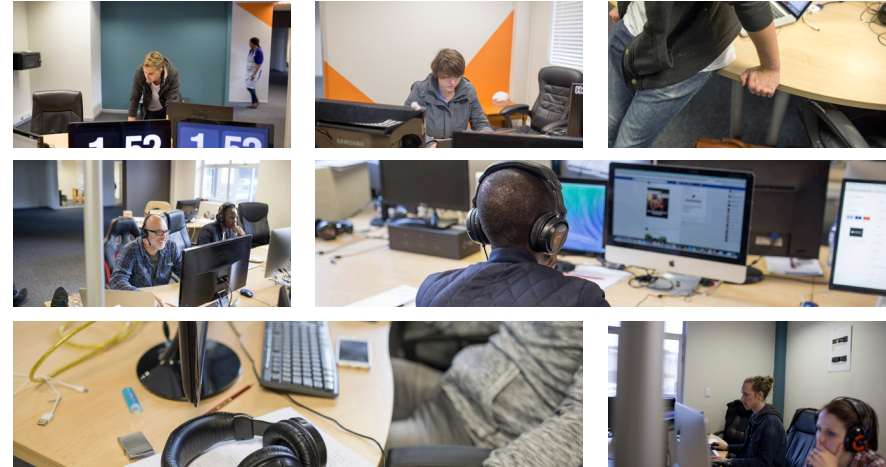
Ideally, tracking closed-loop data and holding monthly management meetings will uncover evidence of a growing disconnect between sales and marketing before the system breaks down completely. And as you get more comfortable using data to manage your aligned sales and marketing team, you'll find new ways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



ABOUT US

Struto is a full-funnel digital marketing agency firmly rooted in an inbound approach. Our services enable your website to attract more targeted visitors, your marketing to convert more leads and your sales people to close more business.

Our marketers are performance-driven, our developers fiercely technical and our designers wildly creative. As a HubSpot Platinum Partner we help you get more out of your software investment by backing your service with our proven lifecycle services methodology that guarantees measurable marketing performance.



/// The End

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