

SALES & MARKETING ALIGNMENT: BRINGING THE PIECES TOGETHER



VanillaSoft
the power of simplicity™

Executive Summary:

As business professionals, we are always looking for that next big thing. The thing that drives business, increases revenue, decreases operating expense, simplifies the process, and works more efficiently. We are desperate for solutions that provide an immediate fix to our productivity and efficiency challenges. That desperation makes it easy to lose sight of the big picture.

As we continue to pioneer into the golden age of automation, we see businesses clamoring for sales and marketing automation solutions. Who doesn't want to open the floodgates of prospect interest by strategically tracking behavior, triggering relevant content, and driving more revenue?

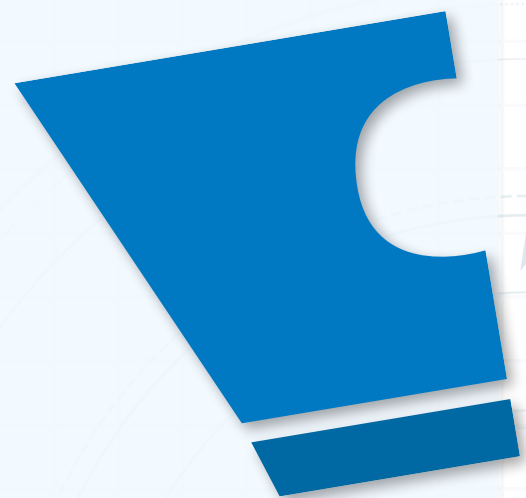
The truth is that most people don't fully understand sales or marketing automation, its purpose, and how to leverage it in the sales environment. Furthermore, most aren't aware of the distinction between marketing automation and sales automation. At the heart of this misunderstanding lies the broader issue of sales and marketing misalignment. This white paper reviews the issue of sales and marketing alignment. The ultimate goal is to help readers understand that marketing automation alone is an incomplete approach, and address the key role that sales automation plays in driving revenue.

Sales and Marketing - Not Sales vs. Marketing

According to a study by The Aberdeen Group, *"Highly-aligned organizations achieved an average of 32% year-over-year revenue growth - while their less aligned competitors saw a 7% decrease in revenue."* Therefore, it is crucial for businesses to address the core issue of alignment before spending on automation platforms. An organization must understand and align the roles of the sales and marketing teams toward the same revenue goal.

A Sales & Marketing Aligned Culture Has:

- Shared understanding of revenue goals
- Consensus on the target buyer personas
- Definitions of and agreement upon what constitutes a marketing-qualified lead versus a sales-accepted lead
- Clear outlines of sales responsibilities and marketing responsibilities
- Shared library of brand messaging and documentation
- Trust between teams and processes
- Software and tools that serve both roles' complementary yet different purposes



The Sales Function Compared to the Marketing Function

The lead that is the easiest for marketing to generate is rarely the lead that is the easiest for sales to close, and the lead that is the easiest for sales to close is rarely the lead that is easiest for marketing to generate. What this illustrates is the natural opposition in motivation between sales and marketing. On one side you have marketing that wants to create the most leads for the cheapest cost. On the other side is sales that wants to close the most deals with the least amount of effort. That's not to say that marketing doesn't want to create or pay for quality leads or that sales won't work hard to close a deal. It comes down to resource allocation. Marketing seeks to maximize the resources of a finite budget and the use of content. Sales seeks to maximize the resources of their time and sales technique.

- **61% of B2B marketers send all leads directly to sales; however, only 27% of those leads will be qualified.** (Source: *MarketingSherpa*)

What many marketers fail to consider is that the salesperson's time and mental engagement with the leads that are being provided greatly affects how a campaign performs. If marketing sends sales low-quality leads, sales might be reluctant to follow up thoroughly, or even at all. If marketing sends over more leads than sales can effectively handle, then sales will naturally allow certain leads that they might feel are inferior to fall by the wayside. Studies show that 36% of leads generated by marketing are never contacted by sales. No matter what the reason, that's a huge waste of company resources.

- **90% of marketing deliverables are not used by sales.** (Source: *The New Rules of Sales Enablement*)

Marketers need to focus on the quality of the content and delivering it to the right audience. Quality content drives qualified buyers further into the funnel. Quality content can attract the right prospect and filter out those for whom the product or service isn't the right fit. Another function of good marketing content is that it maps to the buyer's journey from initial awareness to final decision. Even after the lead is generated, marketing collateral should be available to help nurture the lead and arm the sales representative with tools to move the prospect through the sales funnel.

Beyond the difference in core motivations is a difference in how sales and marketing functions in relation to the buying process:

MARKETING	SALES
Passive	Active
Makes prospects aware	Makes connections with prospects
Wants the prospect to reach out	Wants to reach out to the prospect
Is content reaching people	Is people reaching people

Marketing Automation vs Sales Automation

While there is a definite distinction between the roles that marketers and sales representatives play, many decision makers often mistakenly choose one automation tool over another. With the buzz around marketing automation in particular, many organizations have chosen this type of platform without fully considering the actual impact it will have on achieving revenue goals.

If you are using marketing automation as a way to avoid making calls to reach prospects, then you are using marketing automation in the wrong way. While marketing automation is a great addition that can increase brand awareness, provide tracking of existing campaigns, and drive prospects to reach out, it is not a relationship builder. That's the role of sales: to develop relationships, build trust, understand problem scenarios prospects face, and present solutions that meet the needs of that prospect.

Consider the buying process of a typical B2B decision maker:



A prospect has to have a need, and feel the pain of the need before he seeks out your product or service. Prospects use your content and/or your customers' word of mouth to understand what your product or service is and to determine if there is a benefit that your product or service brings to cure their pain and solve their need. Here is where person-to-person interaction will always have greater value.

Many prospects feel pain, but are uninformed about what's causing that pain. They are misguided about what their needs actually are, and they are confused about what solutions are out there. You risk potentially losing a sale when prospects are left to fend for themselves to interpret your content and diagnose their own problem. It takes a trusted advisor — a sales representative — to guide the buyer through the buying process.

It's surprising to witness the number of people who see the word automation when evaluating a solution and assume that it must do everything — automatically, of course. What people may not realize is that the activities of sales and marketing are not the same. They may overlap and work to accomplish the same goal, but the approach is from two separate directions.

Marketing is the process of communicating the value of a product or service to a target audience or prospect profile. This process of communicating value is performed through a variety of strategies and tactics: content creation, SEO, PPC, online/print/broadcast advertising, branding, conferences, webinars, websites, social media, viral, blast emails, and direct mail. The approach may use narrow and precise targeting or shotgun-blast, wide-net methods. Regardless of the approach, the purpose is to reach out and draw attention to get leads or sales. Marketing automation is the technology that allows companies to efficiently streamline, automate, track, analyze and measure online marketing tasks and workflows, such as email, social media, websites, etc.

Selling is the process of moving someone toward a purchase decision by building a relationship and creating an exchange of value between two people. A sales professional may use cold calling, lead management, scripting, appointment setting, voicemails, email nurturing, and objection handling as ways to build the relationship and provide the value of information and education that can ultimately lead to a purchase. Sales automation is the technology that automates the sales cycle to move leads generated by marketing more productively and efficiently through the sales funnel.

A strong sales automation platform will help the rep move a prospect toward a decision with several key functions: automatic distribution of sales-ready leads to representatives for calls; automation of sales workflows and lead management to ensure every lead is worked thoroughly using logic defined by management; logical-branch call scripting to help reps answer questions and overcome objections; automation of email nurturing and standardized email templates for consistent sales follow up; voice-drop for voicemail messages so that callers can quickly move to the next lead; centralized access to a document library of marketing content to support salespeople throughout the sales process.

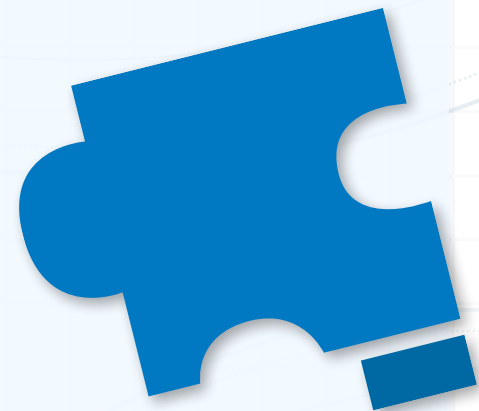
Prospects Buying Process

Stage 1: Awareness

During this phase prospects become aware of their need and begin framing the need with requirements and preferences.

- **65% of vendors that create the buying vision during these early states get the deal.**
(Source: Forrester Research)

It is in this first stage marketing automation coupled with content mapped to each stage of the buying process that can make all the difference for your sales team. It is crucial to establish a strong presence in the prospect's mind to help shape the provider preferences. This can be accomplished through white papers, e-books, or other gated content that will encourage the prospect to provide his or her email address in exchange for the download. At this point, the marketing automation solution can begin tracking the prospects movement across your website, trigger email drip campaigns, and help build a prospect's interest profile that can be handed off to sales when the prospect is ready for a sales contact.



Stage 2: Evaluation

During this stage, the prospect has a clearly defined need and begins to research and compare solutions.

- **50% of sales go to the first salesperson to contact the prospect.** (Source: Hubspot)

This is the stage where the handoff between marketing and sales happens. What's key to understanding this stage is that when prospects enter the research phase, they are inundated with "me too" marketing from several online channels and multiple companies competing for their business. This is not only confusing to the prospect; it can leave them paralyzed with indecision. It's important to have a strategy for sales to reach out to the prospect. The right sales strategy with a strong sales automation platform will ensure that the right sales rep reaches out to the prospect at the right time with the right message.

Stage 3: Decision

The final stage is where products have been evaluated and the buyer chooses a solution to solve their problem.

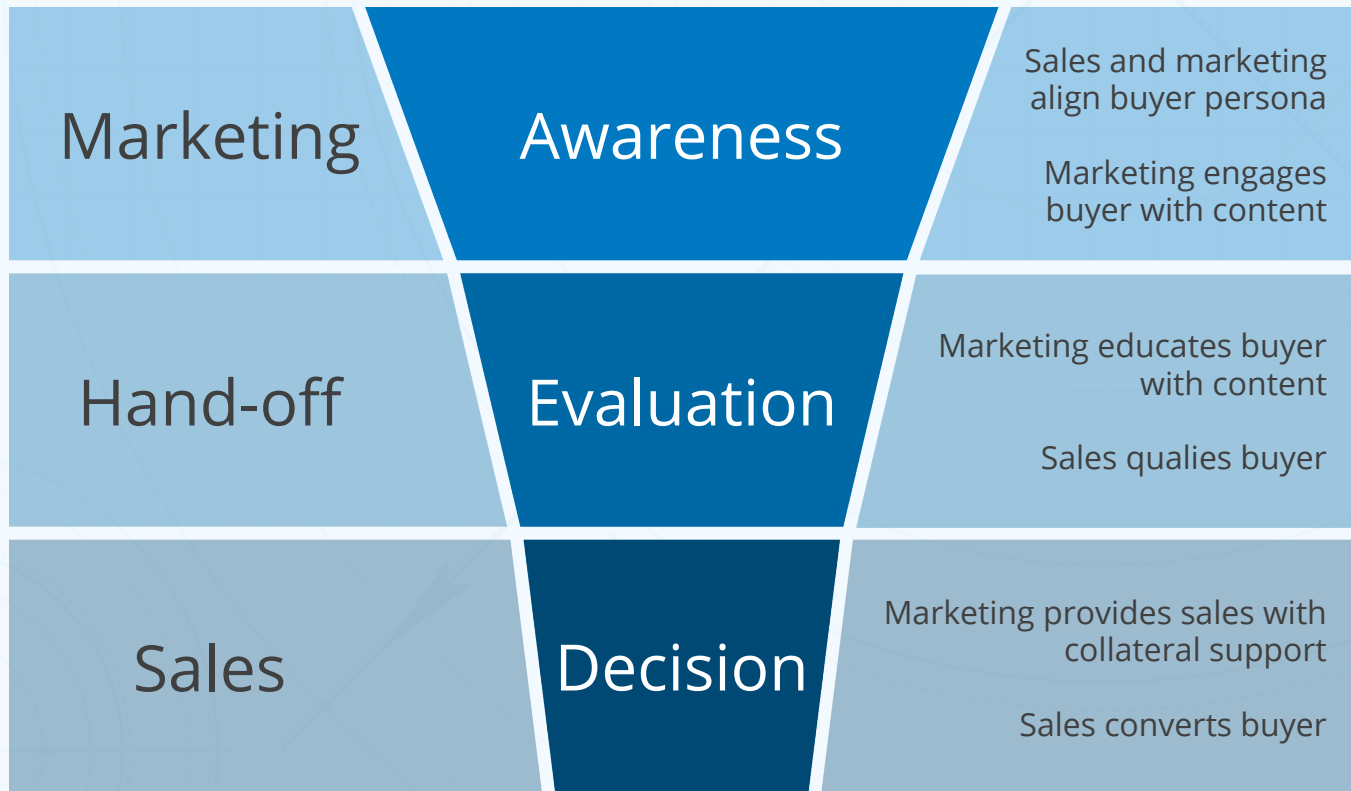
- **70% of buying experiences are based on how the prospect feels they are being treated.** (Source: McKinsey)

Winning the customer comes down to more than price and product; it comes down to comfort, trust, and relationship. Content can build credibility, marketing can nurture that interest, but it is people-to-people interaction that builds trust and relationships.

Marketing automation alone can do a good job of supporting a prospect in the first stage of the buying process. SEO, social media, website content, lead nurturing emails, visitor activity tracking (white paper downloads, webinar registrations, free trial signups, etc.), and various other types of automated outreach provide many ways for prospects to become aware of solutions and help them begin to research each type of solution. It also helps marketers know who is interested in the company's offerings. Where marketing automation alone can fail is in steps 2 and 3. Sure, you can provide a free trial of your product or service; however, without sales follow up, you won't know if the prospect is fully using and understanding everything your solution has to offer. Without sales intervention, you have also left that decision maker as the potentially lone champion in his or her organization. A great sales process ensures a sales rep engages with qualified prospects as a trusted advisor.

Just as marketing automation alone can't effectively close deals, sales automation alone can't necessarily generate the volume of leads your team needs to fill the pipeline. That's where marketing comes in. If you place the burden of awareness and content creation on sales, there will be less time for building relationships and closing deals. The answer is implementing a system that merges the sales and marketing processes and platforms together.

Working Together



The perfect marriage of marketing automation and sales automation essentially boils down to preparing the prospect for an informed and well-timed call from a sales representative. Let's review what a cold call is, what makes a cold call warm, and the role and limitations of sales automation in the cold call process compared to the role and limitations of marketing automation.

Contrary to popular belief, sales automation doesn't make a cold call warm or a warm lead hot. It can contact a cold lead, warm lead, or hot lead, but it is not a system that automatically gathers information to move a lead from cold to warm. It simply facilitates the process of making calls efficiently regardless of the lead's status. Advanced sales platforms do provide lead scoring and routing to prevent cherry picking, however, the status of the lead comes from the data gathered during research or lead qualification.

Bring marketing automation into the mix with sales automation, and you can see better results in reaching prospects and closing sales.



WITHOUT Marketing Automation

COLD CALL

You are calling a lead from a purchased opt-in list. Nothing is known about his needs, timeline, budget, or interests. He is not expecting your call and nothing is known about his engagement with your industry, product, service, or company.

This is a completely blind call. It requires a broad opening and bit of guesswork. This call opens with a lack of knowledge and understanding about the person being called and leads to the prospect being guarded and impatient.

WITH Marketing Automation

WARMER COLD CALL

You are calling a lead from a purchased opt-in list. Nothing is known about his needs, timeline, or budget. You do know that he has opened an email you recently sent and visited several pages on your website around a particular product.

This call is intentional, informed, and purposeful. You are simply following up on his interest around the product he has spent time researching on your site and to see what is driving that interest. This conveys an understanding and insight to the prospects about their need and can make the prospect more comfortable and open to talk.

WARM CALL

You are following up on lead that was called six months ago by another salesperson. You know very little about her needs, timeline, budget, or interests. She is not expecting your call and her recent engagement with your industry, product, service, and company is unknown.

This call opens with a "just checking in" approach, hoping that something might have changed in the last six months. Again, she may feel like a number in rotation and immediately shut down.

WARMER WARM CALL

You are following up on lead that was called six months ago by another salesperson. You know very little about her needs, timeline, or budget. You do know that she visited a page on your website about a specific product a month ago, and recently downloaded white paper about that same product.

Again, this call has more intention and purpose. You know she was looking six months ago, and now you know she is still looking and engaged in specific content on your site. You're following up about the white paper to see if she has any questions about the content, addressing that she was looking six months ago and asking what's been the biggest issue in finding a solution. So many approaches can be taken with these insights.

HOT CALL

You are calling a prospect that recently filled out an online form requesting information about your company's product or service. You know nothing about his needs, timeline, or budget. He is expecting your call.

Even though the prospect is directly reaching out and requesting a call, trust still needs to be gained. You don't know if you are the first company he's contacted, or if he is just bouncing around filling out multiple forms without reading anything on the companies before requesting information. In either case, the first few minutes are spent trying to connect with the prospect while also trying to determine if he is an appropriate fit for your product or service.

WARMER HOT CALL

You are calling a prospect that recently filled out an online form requesting information about your company's product or service. You know nothing about his needs, timeline, or budget. He is expecting your call. You also know that he originally visited your site the previous week and visited several pages around a particular topic. He came back to visit those same pages before filling out the form, and then downloaded a white paper on the same topic after submitting the form.

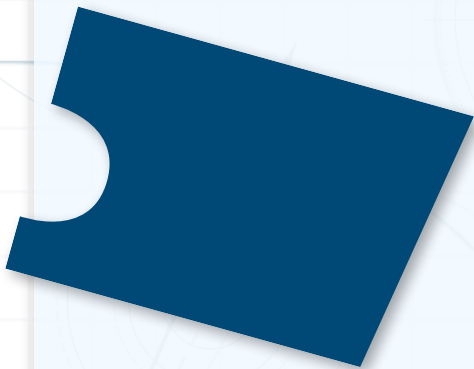
You go into this call with a better idea of how serious the prospect is, and you know that he's spent time on your site and read your content. This gives you insight into specifically what he may be looking for and that his inquiry is intentional and he specifically has interest in your company. This makes a first impression that immediately builds trust in you and your company, and you can build an immediate loyalty to give you an edge over any conversations he might have with competitors.

Marketing automation gives deeper insight into a prospect's behavior to make a call warmer. It provides more information to a sales rep to approach the prospect in a more thoughtful, understanding way.

Marketing automation does not build personal relationships. It informs and engages the prospect in your product or service. It can take a prospect and nurture it with relevant information based on previous interactions with your company, product, or service online. Its limitations? It can only nurture prospects to the point where prospects are ready to reach out to the company on their own. This is where the need for sales/sales automation steps in. Combined, marketing automation and sales automation give the salesperson insight that makes the relationship building process more effective. This also allows a company to define the point at which sales should contact prospects. You can develop a lead management methodology that uses marketing automation data to trigger your sales automation system at the right time for a sales call. The marriage of both systems lets you determine the point when sales has enough information to make the cold, warm, or hot calls more productive.

Closing

Today's sales and marketing organization faces a plethora of automation options that address various stages of the sales funnel. With all these available options, it can be a daunting task to find the right solution mix that appropriately addresses the needs of both sales and marketing. With the increasing attention paid to marketing automation solutions, it is easy to understand why some organizations assume it's a cure-all for issues related to marketing lead generation and sales lead management. However, attention to filling the funnel with more leads without providing appropriate lead management tools to the sales team is akin to making the sales team drink from a fire hose. Best-in-class sales and marketing teams should implement the right mix of marketing automation and sales automation to ensure that sales and marketing alignment can be attained to maximize revenue.



About VanillaSoft

VanillaSoft is the industry's leading sales automation software for sales by phone. Our intuitive and easy-to-use queue-based software for inside sales takes the best of CRM, lead management and telemarketing applications to create the most productive phone sales environment available today.

VanillaSoft's core philosophy and development process is centered on one concept: ***The Power of Simplicity***. It is through this principle that VanillaSoft offers a queue-based platform that allows our customers to see increased productivity, higher contact rates, deeper list penetration, greater management control over the sales process, better sales accountability tools, and a faster speed to lead like no other.

Learn more about how your organization can benefit from VanillaSoft by contacting us today.

Call: (866) 763 - 8826

Email: sales@vanillasoft.com

Website: www.vanillasoft.com

Blog: blog.vanillasoft.com

**30 DAY
FREE TRIAL**

SIGN UP TODAY

