5 Keys to Aligning Sales and Marketing

It is almost a truism within companies that Sales and Marketing often don’t get along but it does not have to be. An important way to get them aligned is to work together to develop coordinated plans.

Here are 5 elements to this process:

1. Coordinated Planning
2. Common terms and definitions
3. Systematic feedback
4. Understanding & respect
5. Management commitment

Coordinated Planning

Most organizations will create a yearly business plan with, at a minimum, revenue and profit objectives. Read no further if your company does not – without a basic business plan, sales and marketing cannot construct their respective plans.

Sales should take the lead on creating a revenue plan which Marketing can then use as an input to their planning. The sales plan should describe the sources of revenue (new customers/existing products, new products/existing customers, etc.) with detailed supporting metrics. As an example, if sales plans to add 80 new customers in the next year, how many leads will Marketing need to generate. How, where and when these leads are generated is the basis for that component of the marketing plan.

The sales management plan needs to include the revenue by source, by period (weekly/monthly) and include assumed average transaction size, win rates and conversion rates, etc. These are necessary inputs to the marketing plan.

Common Terms

What is a Lead? Sales certainly will have one (or more!) definitions – what does Marketing define as a Lead? Is it Sales Ready? Qualified? What do these terms even mean?

A fundamental source of tension between Sales & Marketing often resides here. Establishing a common set of defined terms is critical to gaining effectiveness. There is no substitute but for Sales and Marketing to hammer these out, write them down, adopt and enforce them. As the teams periodically meet (see below) these may be refined.

Systematic Feedback

One of the largest sources of frustration to the Marketing organization is ineffective follow up by Sales. Marketing has devoted significant effort to generate valuable expressions of prospect interest and Sales apparently fails to take urgent action. Frequently, the lack of common terms (the last batch of leads were not qualified etc.) contributes to the problem.

First, both organizations must agree to meet on a regular basis and review the results of Marketing activities, at least quarterly, preferably monthly. Second, this needs to be institutionalized as a high management priority. The meeting can cover:

* Recent campaign response – are these right companies, roles, etc.
* Trends in the market – smaller businesses, competitor campaigns, etc.
* Planned marketing efforts – inputs from sales on specific messages, efforts, etc.
* Metrics – review and adjust

For most organizations, executing a recurring review will increase revenue by at least 10%.

Understanding & Respect

Often the tension between the Sales and Marketing functions is simply due a lack of familiarity with each other, sometimes through physical separation. Both organizations benefit when there is a better understanding of what the other does, how they do it and knowing the respective team members.

For example, if a Marketing person can listen to what Sales hears from customers or prospects during the sale’s cycle, they may incorporate these insights into messaging, blog articles, etc. Conversely, Sales must appreciate the effort and lead times for Marketing to create campaigns, web pages, articles, etc.

Sales can also be a terrific resource to Marketing to understand what is happening, NOW, in the marketplace and the regular review meeting can be the forum for this dialog.

A great way to foster this collaboration and common effort is to organize social events among sales and marketing people – such as regular company funded lunches or an outside the office softball game.

Management Commitment

Sales and marketing leaders who positively collaborate and demonstrate respect are essential to assure business effectiveness. Leading by example through their commitment to meet regularly, appreciate the efforts of the other function, be responsive and act as a team are necessary elements to success. If this is lacking, the business unit leader must step in and make the needed changes.

Sales and Marketing leaders who embrace these 5 keys should enjoy better business results and a more positive working experience across their teams.

John Moroney is an energetic operations and sales management consultant with over 30 years of experience in high technology products and services with a particular passion for sales process design, deployment and improvement. Increasing productivity, driving revenues with a focus on execution, John brings his clients practical and creative solutions that provide both short and long term value. He is a principal with Sales Science and an Associate Partner with Acumen Management Group, a business and strategic sales management consulting firm.

You can reach him at [johnjmoroney@salesscience.biz](mailto:JohnM@AcumenMgmt.com) or LinkedIn: [John J Moroney](https://www.linkedin.com/in/john-j-moroney-3420b63?trk=hp-identity-name)     651-402-4342 [www.salesscience.biz](http://www.salesscience.biz)