



## Bridging the Gap Between Marketing and Sales to Measure and Improve Marketing Performance

The working environment for Marcom professionals has changed dramatically since the economic downturn of 2000. Marketing budgets and staff sizes have shrunk, and senior management demands greater accountability and more quantifiable results.

To succeed in such an environment, Marcom managers need to change “business as usual” in many ways, including placing a new emphasis on doing more with less, publicizing Marcom successes internally, and improving ROI. In particular, they need to focus on their most important function—helping the sales force make sales. But in many organizations, doing that is made more difficult by a common and widespread problem—the disconnect between the Marketing and Sales functions.

What are the signs of this disconnect? They include collateral pieces that Sales refuses to use, completing a “successful” lead generation campaign only to see the leads die on the vine, and an inability to justify the value of a Marcom campaign to senior management.

This paper describes an approach for minimizing and even eliminating that Sales/Marketing disconnect. Although the approach works well for a wide range of companies, it works best for B2B companies with long, complex sales cycles, products that impact multiple departments or processes, and several distribution channels.

*“Up to 90 percent of the collateral generated by Marketing is never used by Sales.”*

*— American Marketing Association,  
2003*

## Aligning Marketing, Sales and Corporate Objectives

Although Marcom programs have their own specific objectives—such as creating awareness, generating leads, establishing preference, or promoting trial—those objectives must be aligned with higher-level Marketing, Sales and corporate objectives. For that to happen, we as Marcom professionals need to:

- Discover *all* internal stakeholders’ objectives—Seek out input from Engineering, Sales, Manufacturing and any other department with a stake in the Marcom process.
- Consider all internal and external target audiences—Don’t focus exclusively on the end customer. Pay attention to the needs of internal customers—such as helping salespeople meet specific customers at shows—and channel partners, who may have somewhat different needs.
- Assess where the project falls in the sales and buying processes—Learn what the process is so your materials provide neither too much nor too little information, given what the prospect already knows.
- Evaluate impacts to/by Sales initiatives—Coordinate with other promotions, trade shows, ad campaigns, pricing policies, ongoing sales cycles, commissions, etc.
- Determine whether or not the Sales team will act on the initiative—Ask them; it’s the only way to know if they think what you’re doing will help them close sales.

## Focusing on the Whole Process

One reason Marcom objectives are often not aligned is that many Marcom managers focus on parts of the sales and buying processes rather than the entire process. By neglecting some elements (in gray at right) of the process, Marcom fails to provide as much support as it could, thereby failing to be as instrumental as possible in helping close sales.

By discussing these processes with Sales and agreeing on materials Marcom can produce that will save the salesperson from having to do so, Marcom can directly help Sales succeed.

### Sales Process

Inquiry  
Lead Qualified  
Demo/Presentation  
Proposal/Quote  
Negotiation  
First Sale  
Upsell/cross sell

### Buying Process

Need defined  
Vendors identified  
Information gathered  
Vendors evaluated  
RFP or RFQ  
Proposals evaluated  
Short list  
Demo/Presentation  
Reference checks  
Vendor selected  
Formal proposal  
Negotiation  
Purchase  
Evaluation  
Additional purchases

## Opening the Dialog with Sales

Many Marcom professionals may be willing to open a dialog with Sales, but are unsure where to start and what questions to ask. Here are some suggestions.

- What does the ideal lead look like?
- Who do you meet with in a client organization?
- What messages are resonating?
- Where are the barriers?
- How do you overcome them?
- What are the competitive challenges?
- What's working? What's not?
- What have you developed on your own?

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To communicate clearly with Sales in the planning stages, we also recommend you:

- Use common vocabulary
- Define audiences together
- Understand Sales priorities
- Ask: If we build it, will you use it?
- Find out if sales leads Marketing is producing are convertible
- Find out how many leads Sales can really handle
- Find out if Sales can sell what you are marketing

Defining audiences is especially critical. You should make it a priority to know *all* your audiences (including internal “clients” and partners) and target each appropriately. Learn what motivates decision makers. Find out how they *really* use your product. Learn your audience’s language, and choose tactics that will prove effective for that specific group.

## Creating Effective Sales Tools

Once you have this information, you should use it as the foundation for your Marcom strategy and develop a set of standardized tools that help Sales win in the field. The kind of easy-to-use, rapidly customized tools Sales needs include:

- Presentation and proposal templates
- Multi-media demos
- Vertical or decision maker-specific case studies
- Professionally designed charts and graphics
- Boilerplate information for proposals
- Realistic ROI calculators
- Messaging for different decision makers
- Competitive analyses
- “Sanitized” and compliant versions of field-generated marketing tools

As you develop and implement your programs, you’ll increase your chances of success if you combine the 30,000-foot view with the field perspective, develop messaging and tactics that appeal to your multiple audiences, and build tools to bridge gaps. If you take responsibility for designing templates that can be rapidly populated with prospect-specific content, you shorten response time for the salesperson and protect the

*“You’d expect Sales and Marketing to be aligned in any successful organization— yet in fact the opposite is often true. The reality is that Sales and Marketing need to synch up or sink. The two need to be integrated in order to build customer relationships, enhance brand, capitalize on leads, improve market share and to boost revenue.”*

— American Marketing Association,  
2003

company look and feel. And once materials are available, be sure to let Sales know that and specify how to obtain them. Also, you may want to consider developing internal case studies to showcase successes and wins that were a direct result of using the materials Marketing has produced.

## Defining Objectives Before Discussing Tactics

As the Marcom expert within your organization, it's essential you play a strategic role and help your internal clients define objectives before discussing tactics. A Sales manager may step into your office and say the sales force needs a brochure or a seminar, but it's up to you to ask why. What's the objective? Are they trying to educate prospects? Overcome objections? Increase conversions? You can help them define their objectives first, then discuss and agree on the best way to meet them, which may or may not be the brochure they originally proposed.

What might they need instead of a brochure? Maybe a website, a tradeshow booth, an email blast, or most likely, a combination of tactics. Again, as the Marcom expert, it's your role to counsel your client and explain how effective each tactic will or won't be in achieving a specific objective.

## Measuring Marcom Results Through Return on Objectives

Measuring the effect of a specific marketing campaign in terms of closed sales is difficult, and even when you come up with a number, it is probably misleading because a sale is most likely the result of exposure over time to a number of marketing messages and activities. A more realistic measurement is to establish quantifiable objectives for a specific campaign at the outset, keep track of the cost, then calculate the return on objectives (ROO). Objectives that can serve as yardsticks for a campaign include:

- Number and quality of leads
- Increase in percent of conversions from presentation to proposal
- Number of appointments
- Number of customers taking advantage of a promotion
- Number of attendees at an event
- Increase in pipeline

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## It's All About Results

In this era of tight budgets, publicizing your success within your organization is essential to preserving your department's staff and budget allocation by convincing senior management and clients just how much value you add to the organization and how directly your work helps achieve important objectives. To raise your profile within the company and call attention to the value you deliver, be sure to take such steps as leveraging and publicizing client wins and successes, using quantifiable metrics whenever possible, and killing underperforming projects as necessary.

The approach outlined in this paper is one we take with clients and recommend you consider in your organization, since it delivers a range of benefits. It can increase the effectiveness of your programs, because it:

- Reduces customer acquisition costs
- Eliminates wasted Marketing dollars
- Develops resonant messaging for all target audiences
- Generates cost-effective sales tools and marketing campaigns
- Improves Marketing accountability
- Expands your qualified pipeline

In today's Marcom environment, it's all about results—and doing what's required to align marketing, sales and corporate objectives is the best way we know to get them.

## For More Information

To learn more about bridging the gap between Marketing and Sales or to take advantage of our complimentary *Ten-Point Marketing Success Analysis*, contact us at:

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