

# Align Marketing & Sales

Two worlds, one universe – one holistic approach by marketing and sales



# Overview

The relationship between marketing and sales could probably make for a turbulent storyboard in many companies. But this interface in the center of these seemingly so opposing departments holds a great deal of potential and, naturally, chances that have an impact on the entire organization. So how can you make this perspective visible to both sides? Transparency is the magic word. And, of course, a holistic approach. We'll tell you how this works on the next few pages.

## Transparency

The signs are there, digitization is advancing, technical prerequisites are in place, cloud established, systems integrated, and yet there are problems when transparency of data is required for process optimization. Particularly when addressing prospects and customers along the customer journey, “lost” valuable notifications are tacitly accepted, which is all the more regrettable, as it is precisely this kind of information stemming from these strategically established touchpoints that is of enormous importance for the profitable development of a prospect into a loyal customer. In order to correct this weakness, one prerequisite is the joint operation of marketing and sales, both of which have historically focused on partly different operational tasks. This discrepancy must be considered for a better understanding, for a simplification from the viewpoint of data usage.

## Data – common ground for marketing and sales tasks

The interest in data from a sales perspective is simple, basically everything that happens around the prospect and customer is of interest. This includes the hard facts such as master data, information about the company and contact data of all communication channels. But also the soft facts are of enormous importance, which include the established notes on customers such as conversation transcripts, interests or participation in events. Information obtained by means of modern systems, which are determined by intelligent systematics, expand the wealth of information. This includes e.g. habits when opening e-mails or focal points of interest when visiting websites. This multitude of information results in a 360° view of each individual prospect or customer, with the goal of recognizing exactly what the problem is and providing the appropriate answers in a targeted and competent manner: Marketing, on the other hand, is less interested in person-related data, but instead aims at identifying groups of similar characteristics through intelligent selections and developing

## Focus on the customer

## Being able to offer solutions requires knowledge about the needs

## Unhindered customer journey

further differentiations to create a personalized approach.

Both marketing and sales always focus their activities on the prospect/customer, but at different times in the customer journey. Harmonizing these activities and uniting them in a harmonious and strategically aligned strategy is a challenge that not only means an optimization of internal processes, but also binds loyal customers to the company in the long term and ultimately ensures an increase in sales. Companies that align marketing and sales show measurable growth, although it should be noted that the B2C world of experience cannot simply be adapted to the high demands of the B2B world. This requires more comprehensive concepts to inspire, convince and ultimately win over prospects and customers.

Another factor for customer retention is time. Today, customers expect the right information about their problem to be delivered via their preferred channels at exactly the right time. In addition, current sales approaches and processes do not match the increased needs of buyers. Often, contacts are flooded with irrelevant emails or phone calls because sales representatives do not properly research the interests, preferences and needs of potential customers before contacting them.

Buyers do not feel that sales or marketing know or understand them - buyers do not feel that companies are truly interested in them or their needs, and that they are just trying to find as many potential leads as possible - which results in a spam-like environment. This unsatisfactory condition causes a growing number of customers to only speak to sales when they are ready to do so.

For companies, this means a change in thinking, because it is necessary to place the customer at the center of action, to live the experience economy. In an increasingly fragmented customer journey, marketing and sales must shift their focus to the micro-moments, i.e. they must recognize the exact moment

of the customer's decision, or at least work towards it.

However, this shift brings serious challenges. What is required is a deep and comprehensive understanding of the customer in order to provide targeted, high-quality and personalized micro moments throughout the entire sales cycle. And to do so from the very beginning, with equal attention from marketing and sales, and with all information documented in a transparent manner. Quality over quantity is the premise, because the tolerance of modern-day buyers is constantly shrinking, which of course makes sales work extremely difficult.

Specifically, this means that sales needs timely insight into the interests and activities of buyers. An isolated approach of marketing and sales is a breach in a holistic customer journey and can exacerbate the lead qualification process.

Aligning marketing and sales is no longer a luxury, but a prerequisite for revenue growth. Gone are the days when sales could "single-handedly" approach a customer without any prior knowledge about them. Marketing and sales are required to work together to align goals and objectives, and use them to develop strategic approaches. Only in this way can the needs and priorities of potential buyers comprehensively be taken into account and satisfied.

## Lead management of the superlative

Therefore, it is imperative for both teams to have access to lead management activities and behavioral data. If the systems do not operate in real time or do not communicate with each other, this can result in a great divide between the teams and the experience of the lead. When marketing and sales do not agree on what makes a good lead and when to best engage that lead in further conversations, trust and credibility are lost. New concepts are required to provide customer-oriented departments with communication and behavioral information synchronously, comprehensively and in real time, and thus create the conditions for sales deals as well as for cross- and upselling. A key element here is to ensure that marketing, sales and service have access to all data. For a positive customer approach, the consistent transfer of information across all channels such as marketing programs and sales activities is necessary. Another aspect is the factor of time, because a qualified and timely lead transfer from marketing to sales improves the quality and shortens the time leading up to the sales deal. The task of fostering and inspiring customer loyalty can be actively pursued through an extensive knowledge about the customer. A requirement for this is the structured use of information combined with a clever assignment to specific products and services, and doing so precisely via the channels used and paid attention to by the lead. Modern systems support this reorientation of focus. For each digital touchpoint with customers and leads, the relevant data can be analyzed and further courses of action can be inferred. After all, this capital of data is unique to each company, which provides an advantage of customer experience. Integrating marketing automation and sales tools enable sales representatives to leverage consistent and up-to-date content, which is used to cultivate and close deals while at the same time maintaining branding, legal compliance or disclaimers, and professional communication.

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