

The Ultimate

Sales & Marketing

Alignment Guide



SalesAmp



Turn Your Sales and Marketing Teams into a Singular Revenue Generating Powerhouse

If you are thinking, heck yeah, we need to do that. Read on.

We at SalesAmp, are passionate about getting marketing and sales teams aligned and working together. Not only because we love these two distinct teams but because the impact is compelling. Marketing and sales teams that are aligned close more deals, achieve revenue growth of 20%+, and have faster 3-year growth and profit rates than those who are not aligned. It's why we developed this Marketing and Sales Alignment Playbook to help you to get your sales and marketing people on the same team. To help get them working together toward a common goal, recognize the challenges, remove the obstacles and get ready to WIN together.

This guide will help you identify your strengths and weaknesses and then leverage the results to identify and bridge the gaps. By bridging these gaps, and taking our suggested steps towards true sales and marketing integration, your company will be closer to achieving measurable sales and marketing ROI.

How Well Do Sales and Marketing Work Together?

20 Brutally Honest Questions To Identify If Your Sales & Marketing Teams Are Aligned

Ask your sales and marketing teams to take this quiz to evaluate each of the following statements on a scale of 1 to 5, where **1** is “**strongly disagree**” and **5** is “**strongly agree.**”

Tally the numbers, and use the scoring scale to help determine the kind of relationship your sales and marketing teams have today. The higher the score, the more integrated the relationship.



To get the clearest picture of your sales and marketing situation, we encourage you to have both leadership and staff take the quiz. You might be surprised to see how perceptions differ not only between teams but also between individual players.

Remember the statistics reveal how important it is for your marketing and sales to be aligned. Marketing and sales teams that are aligned close more deals, achieve revenue growth of 20%+, and have faster 3-year growth and profit rates than those who are not aligned. **AND** for those teams that are not aligned, the statistics show that revenue can actually decline by 4% and it can cost a company 10% of revenue a year.

Team Culture

| | | | | | | |
|-----------|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1 | Our actual sales figures are usually close to the sales forecast. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | If things go wrong, or results are disappointing, neither Sales or Marketing teams point fingers or blame the other. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Our Sales people believe the collateral supplied by Marketing is a valuable tool to help them get more sales. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | The Sales team willingly cooperates in supplying feedback requested by Marketing. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 | When Sales and Marketing meet, they do not need to spend much time on dispute resolution and crisis management. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 | Sales and Marketing manage and execute their activities in parallel with a clearly defined company brand story, mission, vision, purpose, and value set. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7 | Sales and Marketing report to a single C-level executive equivalent to Chief Revenue Officer or a Chief Customer Officer. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8 | Sales and Marketing are both rewarded equally according to similar metrics or are both compensated based on revenue generation. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9 | Sales and Marketing jointly develop and deploy training programs, events, and learning opportunities for their respective staff. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | Marketing and Sales hold regular accountability meetings where they jointly review the sales and marketing pipeline and marketing campaign metrics together. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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Systems & Processes

| | | | | | |
|--|----------------------|----------------------|----------------------|----------------------|----------------------|
| <p>1 There is a common language between Sales and Marketing, and all agree on the definitions of MQL, SQL, Opportunities, etc.</p> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <p>2 Sales and Marketing are committed to the consistent use of a single CRM and marketing automation software.</p> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <p>3 Marketing makes a significant contribution to analyzing data from the sales funnel and communicates that data with Sales to effectively improve funnel predictability and sales outcome.</p> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <p>4 The Marketing to Sales handoff and Sales to Marketing handback points are clearly defined, monitored, and maintained.</p> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Activities

| | | | | | |
|--|----------------------|----------------------|----------------------|----------------------|----------------------|
| <p>5 Sales and Marketing regularly confer to discuss thought leadership topics, industry trends, and buyer pain points.</p> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <p>6 Sales and Marketing work closely together to define segment buying behavior.</p> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <p>7 Marketing people often meet with key customers during the sales process.</p> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <p>8 Marketing solicits participation from Sales in drafting marketing plans.</p> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <p>9 Marketing and Sales actively participate in defining and executing sales strategies.</p> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <p>10 Sales and Marketing actively participate in the preparation and presentation of each other's plans to leadership.</p> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Tally up your answers:

+ + + +

Smarketing score:

How Does Your Company Line Up?

Tally up your scores and use this grading tool to see where your company’s sales and marketing teams fall on what we like to call the Smarketing Scale (Sales + Marketing, get it?). Depending on your score, you can identify whether your problems are stemming from culture, systems and processes, or activities.

100

100 Smarketing Achieved

You are Smarketing Rockstars! At your company, you can’t distinguish between your sales and marketing teams. Everyone is on the same team, driving toward the same goal—increasing revenue— and you’re continuously innovating, encouraging and motivating each other to become the best team you possibly can. Keep up the amazing work.

76-99 Aligned

You’re killing it! The Alignment MVPs. You have closed the many gaps so many marketing and sales teams face today. But there is always room for improvement, after all your team didn’t score themselves a 100! This is where the hardest work happens as it is the fine tweaking that you are working on now to take Your teams to the next level. Take some time to sit down with your team and celebrate all the things you are doing well. Then spend some time addressing what tweaks you could do to make you absolutely best in class when it comes to marketing and sales alignment.

51-75 Connected

Nice job! Very few teams are working with as few gaps as your sales and marketing teams. But there are still some gaps that you could tackle together. It’s time to really get serious about joining forces and aligning. You could consider combining your sales and marketing check in meetings, and/or combining the sales and marketing budgets. Whatever it is, you’re on your way, but don’t stop now. Full alignment is where you will see the biggest impact.

50

26-50 Divided

Okay, so there are some good things happening here between your two teams, but most of the time, you’re divided. Review the few wins that you’ve had as a collective team and come up with a plan to expand on those wins, so you can become a more aligned team.

0

1-25 World’s Apart

It sounds like there might be more of a canyon (than a gap) between sales and marketing in your organization. It’s time to get both of your teams aligned and figure out how to get them working together so your entire company wins. Sit down and review the questionnaire together so you’re all on the same page of where the gaps are and how you can move forward.

Sales and Marketing Alignment Checklist

Every marketing and sales team we work with has gaps. What makes the teams we work with successful is they are willing to take an honest look at those gaps and put a plan together to address them. The grade you just got in the smarketing grader gave you a look at the gaps. Now it's time to determine what you can do about them.

Go back to the grader and see which points you scored between 1-3. If you're seeing a lot of 1's in Culture, that's where you should start making a plan. Or maybe it's Systems and Processes or Activities that have the biggest gaps—wherever your team's biggest gaps are is where you should begin to address them.

Use these checklists for each category to start figuring out your next steps. And remember the end goal: to develop a Rockstar Smarketing Team.

Team Culture

- C-level execs must agree upon, and set the tone for the organization's strategic course to Sales and Marketing integration.
- Emphasize shared responsibility for results between Sales and Marketing divisions.
- Emphasize metrics. Tie rewards to results.
- Enforce Sales and Marketing's conformity to systems and processes.
- Move towards a workspace layout that promotes collaboration between Sales and Marketing teams.
- Heck, maybe even combine your sales and marketing departments into one and call it the Revenue Department.
- Hire a Chief Revenue Officer.

Systems & Processes

- Implement systems to track and manage Sales and Marketing's joint activities (ex. CRM, marketing automation).
- Utilize and regularly update shared databases.
- Establish common metrics for evaluating the overall success of Sales and Marketing efforts.
- Create a reward system based on similar revenue-driven KPIs between Sales and Marketing.
- Mandate that Sales and Marketing teams meet regularly to review and improve overall communication and team effectiveness.
- Require sales and marketing heads attend each other's budget reviews.

Activities

- Jointly involve Sales and Marketing in product planning and in setting sales targets.
- Jointly involve Sales and Marketing in generating the brand story.
- Jointly involve Sales and Marketing in developing market segments, prospect personas, and mapping content to the buyer journey.
- Jointly involve Sales and Marketing in assessing customer needs and pain points.
- Jointly involve Sales and Marketing in any sign off of advertising and promotional materials.
- Jointly involve Sales and Marketing in analyzing and optimizing the sales and marketing pipeline.

10 Questions to Ask an Outsourced Sales and Marketing Alignment Firm

Alright - you now know where there are gaps, you know in theory what needs to be done. But you know you need help to either get on the right path or to help fill those gaps in your smarketing processes. Finding the right agency to come alongside your marketing and sales teams will be critical.

Here are 10 questions to ask potential agencies as you begin your search:

1. What experience do you have with marketing teams? With sales teams?

Most of the companies/agencies out there today have experience with one or the other. So one of two things can happen:

- a. You hire two companies—one sales, one marketing—who focus only on their portion of the process, without intention to unify the two teams, potentially leading to a larger gap.
- b. You hire EITHER a sales company or a marketing company, leaving one of your internal teams feeling underrepresented, defensive, and unwilling to fully engage.

2. How do you work with your clients who have misaligned goals or processes and challenges getting along?

Stepping into a misaligned marketing and sales team is anything but easy. It can be tense and there can be landmines around every corner. You will want a firm that knows the value and importance of each team's role and can help each team feel seen, heard and valued. The company you hire should understand their first job is to build trust between the two departments or all other efforts will fail.

3. What is your process for developing content and collateral?

A huge % of marketing materials developed are NEVER used by sales. Why? Because sales was never consulted on what they need, what the market is saying and what their client challenges are. Many sales people struggle with truly telling the value of their offering—they've never asked for help and marketing is in their own silo not thinking about their offerings and their target audiences' pain points. Helping marketing to see their role is where sales will start to not only use the materials that marketing creates but be grateful for the help and support in producing them.

4. What are the fundamental elements that you feel are crucial to sales and marketing success?

This is the foundation to whether or not they will be successful. You want to be sure they are focused on understanding and aligning the marketing and sales teams first and foremost. Also, that they understand your goals and confirm that they believe they are attainable. Getting everyone on the same page will allow your campaigns to be much smoother and dramatically more effective.

5. How do they start their engagements?

Great campaigns start with getting everyone—marketing, sales, and leadership, even content teams—aligned on the messaging around your company and your offerings/products—who your target audience is, what pain points they have and what is important to them. It is also a great time to do an audit and understand what marketing and sales tactics have been successful in the past and what needs to be tweaked. You should be setting expectations for the engagement and building KPIs to help ensure you are moving towards success, as well as ensuring marketing and sales are on the same page when it comes to how you are defining a marketing qualified lead [MQL], sales accepted lead [SAL] and a sales qualified lead [SQL]. Finally, there should be a tech stack audit to ensure the technology is in place to meet your goals.

6. Do they have (in house) a content team? A marketing team versed in inbound and outbound tactics? A BDR/prospecting team?

The integration between content, marketing tactics and a team who reaches out in real-time with engagers is key. These three teams need to be intertwined, learning from each other, collaborating and driving results based on what they see in the market.

7. What marketing tactics do they use?

This seems simple but shouldn't be overlooked. The answer should include ALL they could do but also an understanding that no two clients are exactly the same. That based on your product/service, target market, and budget they should be putting the right marketing mix together for you.

8. What do they do with leads that their campaigns generate?

There are two red flag answers to this question. The first, is nothing. They wait until the prospect reaches out. You want to be sure they have, as part of their process, a way to warm up those that have engaged. They could do this either with email, phone calls or social connections - but nothing is never the right answer.

The second is just as detrimental to the campaign's success. They hand the engagers directly over to your sales team. Many engagers are not even close to buying, they are only beginning to sense they have a problem, they are doing research. You want someone to reach out to them BUT you do not want to hand them over to sales as if they were a qualified lead. This is one of the fastest ways for sales to stop trusting marketing and to shut down as they spend time chasing leads who aren't even close to close.

9. Can you share any case studies or proof that your system works?

It's important to see what they have done for their clients and if this matches your expectations of what you would hope they would achieve for you and your teams.

10. How do you define ROI?

This is a great final question as you will want to be sure what they see as success is what you see as success. There are key metrics they and your team should be marching towards at various stages of the engagement. Understanding what those are and how long they expect it to take for true ROI are great things to discuss upfront.



So now what?

As you begin the search to find a marketing and sales alignment company, it might be time to bring in a special teams coach that can help align your Sales and Marketing Teams and nurture your customers successfully from the top of the funnel all the way to a closed deal.

There are few companies that have the skillset and bandwidth to do every portion of what's necessary on the journey to Smarketing. That's why companies like us exist, and we'd welcome the opportunity to be considered. We help our clients identify the specific gaps between Sales and Marketing and create actionable plans to help businesses create more measurable ROI.

[Reach out to us to set a discovery appointment](#) or [fill out our form to take advantage of our free AlignIn3 assessment](#) and see why Sales and Marketing Alignment matters to your bottomline.