

A group of four business professionals (three men and one woman) are sitting on a blue sofa in a modern office with large windows overlooking a city skyline. They are all smiling and engaged in conversation. One woman is holding a white mug with the LinkedIn logo. A laptop is open on a table in front of her.

# **SOLVING SALES AND MARKETING ALIGNMENT:** WHY IT'S BROKEN AND HOW TO FIX IT

# A NOTE TO THE PROGRESSIVE SALES LEADER



The lack of alignment between sales and marketing is an age-old problem that is often addressed, yet rarely solved. Years ago, businesses didn't need to worry about the alignment because customers gathered in the same places, making it easy to keep sales and marketing messages unified. But these methods no longer work in today's multichannel, buyer-centric world. The shift in the buying process underscores the need for alignment.

Between poorly targeted messages, sales representatives that fail to understand the potential customer, and the disconnect between sales and marketing, companies are at a competitive disadvantage. According to Nielsen, **41% of online ads reach the wrong audience**. SiriusDecisions found that **70% of content goes unread**. In the worst news for the sales force, **72% of cold calls result in outright rejections**. **And the success rate of cold calls to appointments is 0.3%**, according to a Baylor University study.

Why are sales and marketing still siloed? Companies know that sales and marketing need to be aligned, but they either don't know how to start or where the discrepancies lie – is it communication? How leads are defined? Or do they have misconceptions about each other that need to be addressed? As companies grow, it is harder to track inconsistent messages, making them harder to fix. How do you create a partnership between sales and marketing to move from generic messages to a customized approach?

According to a study by InsideView and *Demand Gen Report*, **49% of respondents said a communication breakdown is the greatest culprit**. **Broken and flawed processes (43%)**, as well as **sales and marketing being measured by different metrics (40%)**, rounded out the reasons for the gap between sales and marketing. Understanding the hurdles can help B2B organizations overcome their challenges.

To address this vexing problem, we created this guide to help you recognize the causes of sales and marketing misalignment, and to formalize your processes around measurement, messaging and everything in between.

Use this guide as your playbook to ask questions, build your programs and work with your sales and marketing teams, as well as to learn best practices from the top companies and leaders who've put them into practice.

**Alex Hisaka**  
Content Marketing Manager  
LinkedIn Sales Solutions



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## Step 1:

# UNDERSTAND AND IDENTIFY YOUR TARGET BUYER

Creating a marketing and sales strategy without a clear understanding of your audience segments is like going out to sea without any navigational tools. You're out taking action, but you're not working toward a specific goal. This is a huge waste of time and money without clear potential for good ROI.

### Who is your audience?

Marketing buyer profiles are limited in their potential to uncover motivations and buying patterns. And these can change based on different regions and verticals. Your potential buyer can be the CEO, a VP of sales or marketing, or even a sales rep that influences the decision-making process. Having context on each type of audience segment is going to help you market and sell.

### What are their most pressing issues, problems and desires?

Every person has something that keeps him or her up at night. Whatever the issue, whether it's longstanding or short-term, it should be the main point of the discussion and invitation into their lives. Understand the predominant problem and what's driving people to seek out products and services like yours. Then, focus on establishing

empathy with the audience you're planning to serve. Craft a clear offer based on the positions you want to take.

### Where are they coming from?

Understand what channels they are on and their consumption habits. For example, do they read blogs? Do they subscribe to emails? They might prefer short-form, interactive content, or they may want you to dive deep for 1,000 words or more into the topic in lengthy white papers. To really dig into this, you have to understand how marketing is speaking to these buyers today.

**Both sales and marketing agree that knowing your audience is key:**

An infographic showing 74% with an orange circular progress bar that is approximately three-quarters full.

74%

**74%** of sales and marketing professionals cite customer intelligence as the key to successful prospecting

An infographic showing 52% with an orange circular progress bar that is approximately half full.

52%

**52%** of sales and marketing professionals point to lack of sufficient data to support segmentation as a stumbling block

Source: *InsideView/Demand Gen Report*

Step 1: Understand and  
identify your target buyer

# BMC SOFTWARE SUCCESS STORY

**BMC has found that their historic buyer is transforming** — quickly — and now many other portions of an organization are emerging as buyers and implementers of their software. As a result, there has been an effort at BMC to develop new messaging and narratives in order to resonate with this changing buyer. This, of course, has a major impact on the sales teams and ensuring they are trained on this new messaging and new buyer. Social selling is going to continue to be a cornerstone to their success.





# JULIE EKSTROM

Senior VP of Sales, IDG Enterprise

### **LI: How do your reps identify and learn about their prospects?**

**JE:** Like many industries, the world of tech marketing is full of movement, and new titles have been added over the last few years, expanding the traditional types of roles we work with. Fortunately, we have a team approach where sales team members, account coordinators and marketing work together to identify prospects. This includes speaking with existing contacts about expanded teams, using social – like LinkedIn – to learn about contacts at a specific company, as well as capturing inbound leads from content marketing promotions.

Once a prospect is identified, our sales executives manage outreach to learn about this person's challenges and build a relationship to help them find the best solutions.

### **LI: What role do social channels play in the learning process?**

**JE:** Research we conduct among tech decision-makers explains that prospects want a knowledgeable

sales representative, from understanding their industry to having a deep understanding of solutions that can help solve problems.

Prior to calls, our team does its due diligence on companies by reading their websites and announcements. Additionally, we explore social feeds to learn about product launches, event participation and new content to understand how they are currently promoting solutions. All of this research allows for an engaged conversation. These conversations are the foundation for future relationships, and the more prepared our team is, the better conversations and follow-up will be.

### **LI: What information do sales and marketing teams need in order to maximize the performance of social channels?**

**JE:** We want our sales team to be viewed as a partner when they contact a prospect, whether through email or a social channel. To help set this tone, many of our sales executives have refreshed their social profiles to outline how they can help a B2B tech marketer, instead of skills that a recruiter may be interested in, like strong negotiation skills.

Our sales executives are company ambassadors across social. We encourage them to use the channels that our customers use and to follow/like the company pages, as well as the individuals that they work with. They also share relevant messages crafted by the marketing team, as well as their own posts, to blend insights and personality.

### **LI: How are you using social channels to bridge geographies among sales reps who work in different regions?**

**JE:** We are currently using social more for external communications. We have found that weekly conference calls are still one of the best ways to outline announcements, share wins and ask questions. Our CRM includes dashboards on customer engagement and closed business, which provides additional insight and details to the entire sales team. Our marketing team also sends a weekly email that calls out new tools the sales team can use for customer and prospect engagement.





# ROXANE BAL

Senior Insights Analyst, LinkedIn Sales Solutions

### **LI: How do social channels like LinkedIn help sales reps better understand their buyers?**

**RB:** Social channels are key business intelligence tools to make conversations with buyers more meaningful! They empower sales reps to acquire insights about their buyers at three different levels: learn about companies, specific groups of buyers and individual decision-makers. Reps leverage social channels to stay informed on a company's latest news and updates (e.g., a change in their strategy), to discover trends in their clients' industries (e.g., what the buying process looks like), or to understand what matters for a key contact or stakeholder.

### **LI: How do those same channels help marketers define audiences and develop customized messages?**

**RB:** Social channels enable marketers to access the most up-to-date information to engage with their target audiences in a relevant way, and there are four ways they do so:

- 1) Find intelligence and reports about specific audiences;
- 2) Identify and search for audiences with granular targeting based on members' profiles;
- 3) Reach out to them with custom messages at scale; and
- 4) Measure the performance of these messages using analytics.

### **LI: How does your team use specific LinkedIn tools to gather audience insights?**

**RB:** My team turns complex data into actionable and highly impactful insights by leveraging LinkedIn's rich data set, and conducting surveys

in order to help our clients and sales teams make data-driven decisions. By analyzing data in aggregate, we are able to target custom audiences to understand their behaviors and opinions.

### **LI: How do those insights help you deliver customized messages?**

**RB:** In a world where it's hard to reach buyers and cut through the noise, my team harnesses the power of data by distilling it into recommendations and best-practices. We advise sales and marketing on whom they should contact, when they should contact them and what content is most relevant to engage with them.

For example, one of my colleagues analyzed how a salesperson's relationship with a prospect impacts the likelihood of an InMail response. One of the takeaways was that sales professionals see a 46% lift in InMail acceptance rates when having at least one commonality with a prospect versus having no commonalities.



# CAROLA VAN DER LINDEN

Global Virtual Marketing Manager, Cisco

### **LI: How does your marketing team work with sales to develop the right buyer personas?**

**CV:** We create buyer personas in Cisco to identify the perfect buyer, the perfect person that we could target with a marketing message based off segments, job descriptions and based on where a person is currently in the buyer journey. We have four definitions of customers that we're targeting. We really emphasize the personalization of marketing, so we also encourage our sales teams to send personalized messages as much as possible. Although the buyer persona may give us very important information about the buyer, like where they are, we also keep in mind where the buyer fits in the process, which is important for the salesperson to know.

### **LI: What types of data help you define audience segments?**

**CV:** We've segmented the audience and defined each type of customer so our salespeople can map prospects against those segments. The data is based on the number of employees that work for that company and where there are industry spenders. When there are 0-99 employees, we call it a small company; 100-250, a small business; 250-999, it's in-market or commercial, which is the segment I work in. We have a segmented sales organization, meaning we have a sales group that operates in the Cisco office and uses collaboration tools and social platforms to have an ongoing dialogue with their particular customers.

### **LI: What role do social channels like LinkedIn play?**

**CV:** We teach our sales teams, both internally-based teams, as well as those in the field, that the buyer's journey has changed dramatically. Seventy percent of the buyer's journey happens

online; picking up the phone or sending an email is rare. If we cold call, it goes to voicemail, and we never receive anything back unless we have an established relationship with that customer. Cisco has Twitter handles for countries and topics like the solutions we sell. We also have LinkedIn and Facebook communities because, in addition to having a corporate social visibility, we also require a sales presence on social media. Twitter and LinkedIn are what our audience uses the most, so it's important for our salespeople to have a presence on those same platforms. We also have LinkedIn Sales Navigator to support our sales community so they could learn more about customers and do social learning – find out what kind of questions they are posting, what communities they are a part of and what kind of blogs they post. It gives Cisco great insight into the contacts at a company we want to sell to and how that company is broken down. Another advantage of LinkedIn is finding lines of business within LinkedIn Sales Navigator. All of these channels have become the default for how a Cisco sales rep works throughout the day.



## Step 2:

# IDENTIFY THE GAPS IN SALES AND MARKETING

Every B2B company identifies gaps at some point in the sales cycle, but it can be difficult sometimes to isolate the root cause. Here are some steps to take to find your gaps and begin plugging them.

### Analyze prior sales and marketing performance

If you're going to improve your win/loss ratio, it's important that you understand your prior performance through the sales cycle. This allows you to spot patterns or trends that may have relevance to why your opportunities end up as a win, a loss or a no decision.

### Assess current sales and marketing processes

Identify what are the key sales and marketing process gaps. Consider the following:

- What steps need to be added, deleted or improved?
- Has your organization defined the ideal way to sell and market its solutions?
- Does it have a proven, repeatable process for generating leads and converting them through stages into orders and repeat orders?

### Assess current sales and marketing strategy

Attention often turns to strategic gaps, which often is outside of the control of the

salesperson who has an important bearing on success. Consider examining:

- Target customer profile and market focus
- Messaging and proposition
- Implementation
- Short-term focus and sporadic sales drives
- Demand generation
- Position as expert in the industry

### Survey customers

Feedback from customers can provide you with a plethora of knowledge about your own sales process shortcomings. For example, you can ask questions like:

- Did the sales team establish realistic expectations for the implementation time frame and subsequent results?
- Which methods of engagement do you prefer with your account executive?
- Did we take too long to respond to questions or provide you with requested information during the sales process?

## CREATE AN ASSESSMENT FRAMEWORK

Work with your leadership team to identify current shortcomings and then set goals for where you want the team to end up for better alignment.

### WHERE ARE WE NOW

Common practice  
Forecast sales  
Past performance  
Perceived Needs  
Today's skills and sales training  
Strategy (what we say)  
Management view  
Our solutions  
How we sell

### WHERE WE WANT TO BE

Best practice  
Sales target  
Future potential  
Real needs  
Tomorrow's skills and sales training  
Implementation (what we do)  
Team view  
Market needs  
How our customers buy



# ROSEMARY CLANCY

Social Media Sales Program Manager, Oracle

### **LI: What factors led you to rethink the relationship between sales and marketing?**

**RC:** At Oracle, we have a program of sales reps who work with marketing to leverage and execute sales campaigns for EMEA. Specifically, my team works closely with marketing to help localize messages and identify hot topics within various industry sectors. Since social selling is about engaging within customers in a meaningful way, we do that by sharing relevant and valuable content. Our inside-sales teams really leverage the Oracle message with their network, and that employee advocacy approach really amplifies the marketing messages. Since sales reps know their customers, they'll localize or translate messages so that it resonates with their customers. This leads to increased engagement rates, and the idea of globalization has led to our sales and marketing teams really collaborating well.

### **LI: How did you analyze past performance?**

**RC:** The key reason for having a social selling program is so that we can engage with our customers on platforms where they are active. When a rep has a territory, we want them to have touch points with those accounts, have saved leads within Sales Navigator and then be able to speak to their pain points. To measure this, we use a blend of marketing metrics: content sharing, customer engagement, influence on pipeline, tracking opportunities and correlation to sales performance. We look at engagement rates, reach, our Engage with Insights score, our Social Selling Index (SSI) at an organization and team level, and how SSI correlates to performance.

### **LI: What were the key takeaways?**

**RC:** Social selling is a fundamental sales skill and is something that is in the DNA of Oracle reps, so we work together with marketing to create and deliver valuable content at different stages of the sales cycle. We do social media listening

to understand the customer, so we really know our customer's voice. We encourage sales reps to share information in a "411 way," to show they are up-to-date with industry trends, and to share both pieces of marketing content and pieces that are interesting to them. Sales is not overly reliant on marketing material, and we help marketing by showing them examples of what works well and what reactions we're getting. We can give real-time feedback from our reps.

### **LI: How did the interplay of sales and marketing change and what has been its impact?**

**RC:** Our marketing message now has an expanded reach because sales reps are leveraging the network better. Another big impact is a heightened customer experience. Sales reps are now in touch with their customers on a daily basis, they get better feedback and can understand pain points better, which in turn helps us develop better campaigns that are focused on overcoming those challenges. This has all given sales and marketing the ability to be more agile together.



# ANDREW STEIN

Business Operations Manager, LinkedIn Sales Solutions

### **LI: Why is sales and marketing alignment important in any organization?**

**AS:** Sales and marketing alignment is important because marketing should provide sales with leverage, and therefore sales reps should be more productive due to marketing efforts. The only way to make sure that truly happens is to make sure they're aligned. For example, if a salesperson can spend a certain percentage of their time per day on inbound as opposed to prospecting themselves, assuming those leads are good and they've expressed what makes a lead good, they should be able to open more opportunities and close more bookings as a result. Also, imagine that with every dollar that you pump into marketing, you can effectively raise the group of sales reps' quotas by that dollar, and quantify a way to make sure marketing is fully aligned with sales.

### **LI: How can marketers improve the quality of their leads for sales?**

**AS:** There are two schools of thought – the first is to target selectively and to make sure the inbound leads that marketing is driving are well aligned with the types of leads that sales is looking to convert. The second one is for marketing to drive as much awareness and as many leads as they can. In order to do so, they need to have a process in place, such as lead scoring, so that only the cream of the crop gets sent on to sales reps. At LinkedIn, we try to do both of those, both broad-reaching and targeted campaigns.

### **LI: How does sales and marketing alignment affect lead conversion and bookings?**

**AS:** Assuming marketing is providing the leverage they are supposed to, sales should be more productive and be able to increase their quotas. Their alignment is key, because it's the qualitative

feedback that you get from sales reps that marketing should incorporate into their campaigns and who they target. Sometimes it's making sure everyone is on the same page, consistently converting to the top and bottom of the funnel.

### **LI: What is your best piece of advice to organizations that are struggling to align their sales and marketing teams?**

**AS:** It's critical to align those teams, but it can be painful. The first step to alignment is making sure the lines of communication are open between the two teams. Another way to encourage collaboration is a distinct focus on the customer rather than the internal teams. It is also important to stick with the final goal and be patient. Sales and marketing alignment takes time, but the final product is having a well-oiled machine, which is best for the company. Fight through the challenges; it may get worse before it gets better, but it will get better.





**GILES HOUSE**  
Chief Marketing Officer, CallidusCloud

### **LI: How did you identify the disconnections between sales and marketing?**

**GH:** By looking at our data, we could see a lot of leads being passed over. They were stalled, and we found that there was a bit of a disconnect between sales and marketing. Also, we discovered that the sales team wasn't always following the procedure to move the leads forward. We were scratching our heads, wondering if [our processes were] working, because we didn't see it getting very far down the pipeline. There was definitely a breakdown, and we needed to remedy it, along with aligning on expectations, rules of engagement and a redefined process.

Other than examining data, salespeople are good at giving feedback. Ours gave us feedback on what the definition of a lead was so that we could keep iterating on that. They also let us know what they wanted to take on, and we changed their workload based on what they already had on their plates and their sales capacity. It's a fluid thing, rather than a point-in-time exercise.

### **LI: What role did data play in the identification of the gaps?**

**GH:** With our data, we were looking at the funnel, our marketing automation system and our CRM to identify where activity was occurring. In the end, we got in deep with leads and the creation dates on opportunities. One of the things we found was that sales was recreating and re-entering opportunities instead of traversing through the lead record. It was an educational opportunity, so it helps to dig into data to find things like this.

### **LI: How did realignment impact your sales and marketing strategy?**

**GH:** Strategically, it didn't impact it. Our intent from the beginning was to be well-aligned. It's something you absolutely have to do; it's not an optional, "If I've got time, I'll talk about it with my sales leader, head of marketing or head of demand generation." You can't be successful if sales isn't closing on leads. There can be none of this "marketing first, we'll lead the way to the deal." The deal doesn't happen without sales closing it. Our job in marketing is to find the meat; their job

is to kill it, skin it and bring it home to the cave. It's important to make sure they're following up on the leads you've invested in, and it's important that you do your due diligence by checking in with salespeople and leadership at every level. Make sure they're well-fed, or if there's too much on their plate, dial back and qualify prospects harder.

### **LI: How has this realignment helped your company connect marketing to revenue?**

**GH:** Operationally, we're able to attribute a lot more revenue to marketing programs, which is exactly what you need to do when you're battling for budget in the boardroom. It has allowed us to demonstrate a lot more ROI on marketing and personnel, which has allowed us to continue to grow the team, and grow in excess of 30% quarter on quarter.

## Step 3:

# DEVELOP PROCESSES TO BRIDGE THE GAPS

Realigning both teams toward the same revenue goal is an important first step, but the strategy for getting there needs to be defined together. Have your sales and marketing teams work together to achieve the following:

### Align on goals

Arrive at a shared understanding and agree on the business objectives both teams want to pursue as a springboard for the next steps.

### Determine the lead process

Create a defined workflow that helps the organization track the steps from the point at which a lead is generated to when the lead is handed off to sales. You can start by defining your sales pipeline stages in your CRM. The textbook approach is similar to this:

Inquiry → MQL (marketing qualified lead)  
→ SAO (sales accepted opportunity)  
→ SQO (sales qualified opportunity)  
→ Closed/Won deal

This process may evolve as you try different campaigns and get feedback from sales.

### Develop a qualified lead definition

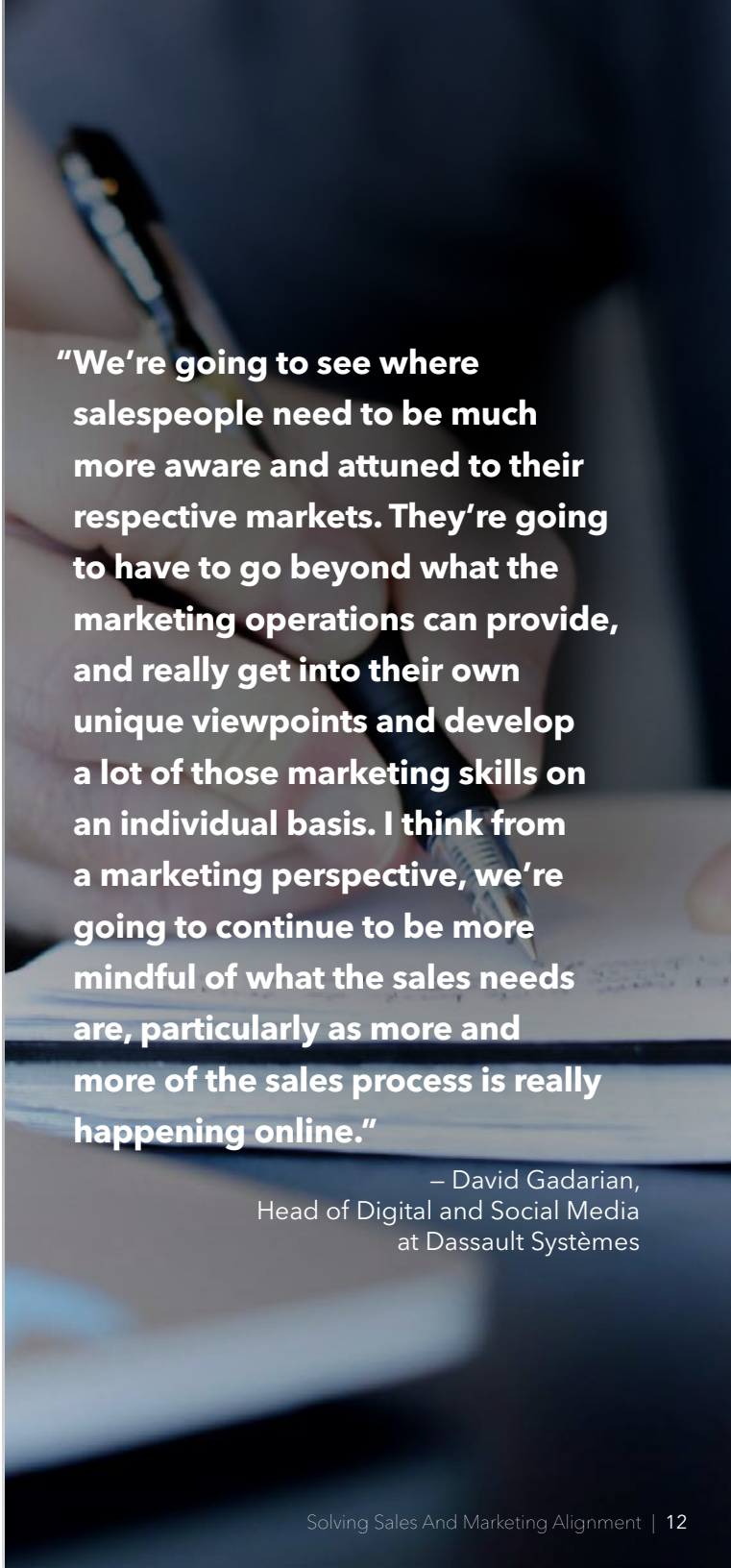
Determine when a lead is ready to be passed to sales. This should include information such as company size, seniority, industry and behavioral information, such as whether the lead attended an event, requested content or asked for a demo.

### Determine the lead hand-off process

Define which leads will be handed to sales and how sales will follow up on these leads.

### Develop Service Level Agreements (SLAs)

Resolve what the performance metrics will be that marketing and sales must deliver. For example, marketing will agree to deliver a predetermined number of qualified leads, and sales will agree to follow up on qualified leads in a specific time frame.



**"We're going to see where salespeople need to be much more aware and attuned to their respective markets. They're going to have to go beyond what the marketing operations can provide, and really get into their own unique viewpoints and develop a lot of those marketing skills on an individual basis. I think from a marketing perspective, we're going to continue to be more mindful of what the sales needs are, particularly as more and more of the sales process is really happening online."**

– David Gadarian,  
Head of Digital and Social Media  
at Dassault Systèmes



# ANDREA AUSTIN

VP of Enterprise Sales, InsideView

### **LI: Has the alignment of the sales and marketing departments helped lift sales?**

**AA:** The focus of sales is best placed on progressing qualified/accepted opportunities through the sales cycle, which has complexity and needs the right amount of pressure to ensure momentum is not lost. Sales and marketing teams ultimately share the responsibility of demand generation and sales development (campaign execution, event participation, etc.). An aligned sales and marketing team has trust that allows marketing to focus on top-of-funnel lead generation and deeper in the funnel opportunity nudging, and allows sales to drive those opportunities to a win. The trust and shared responsibility comes from alignment. When trust does not exist, both teams try and blame each other for the hiccups that will always occur in the course of our efforts.

### **LI: What impact has realignment had on overall workflow?**

**AA:** The workflow in an organization with an aligned sales and marketing team is designed and managed collaboratively. Aligned teams are not hesitant to fail because they know how to fall forward – learning from the failures and getting better faster. Alignment fosters a desire to understand the “why” vs. only focusing on the “what.” The workflow is understood better, adjusted collaboratively, and exceptions are managed without blame. There are going to be workflow falters, and if the teams trust each other the issues will be resolved quicker because there isn’t the fear of finger-pointing.

### **LI: How do your reps work with marketing to develop and deliver tailored messages?**

**AA:** We have a “Smarketing” meeting (a regularly scheduled sales and marketing meeting) that aligns the teams. We have operational meetings that allow for a double-check on a campaign,

event, webinar, etc. We engage top field reps with marketing team members to brainstorm and experiment together. Even if the marketing team is just humoring the sales team, we feel we are being asked, heard and engaged. We perform A / B test messages, and marketing proactively seeks our input and feedback on what is and is not working.

### **LI: How does this collaboration with marketing smooth the customer journey?**

**AA:** The collaboration with marketing has allowed us to remove the concept of a funnel altogether and replace that with an infinity concept. The infinity symbol best represents how we partner with marketing to engage along the customer journey. We collaborate to find leads, engage prospects, close customers and grow those relationships. We nurture leads, prospects and customers – InsideView operates as a thought leader in the market. We have great solutions, but we have great ideas as well.





# PATRICK CHEN

Senior Manager, Demand Generation, NA, LinkedIn Sales Solutions

### LI: Why is segmentation and targeting important in marketing?

**PC:** You've heard the old adage that great marketing engages the right person, with the right message, at the right time and place. In a world where the informed and connected consumer holds sway, segmentation and targeting are table stakes in achieving this plan. It shouldn't be news to any marketer that it's imperative to approach consumers with the messages and offers that are relevant to them, and ideally, that they actually want to see. Think of your worst experiences with a brand's marketing, and it's likely that much of the poor experience was caused by a lack of diligence in segmentation and targeting (e.g., that all too familiar display ad that follows you around the web, hawking a product you bought just the other day).

Marketers need to be even more vigilant in today's hyper-connected world, where a poor brand experience can wind up going viral within seconds – or on a less extreme scale, where the

unsubscribe or opt-out link is just a tap away. Going the extra mile to truly understand the different segments of consumers you're trying to reach will pay dividends in the long-term and help to build the trust that is needed to win over consumers' minds and hearts.

### LI: How do segmentation and targeting impact sales?

**PC:** Focusing on the right segments of your prospect audience is key in being able to tailor your content and messaging in a way that truly resonates with your target buyer. If you're running campaigns that are aimed at the right folks, and your content serves to activate and engage these prospects, then the resultant leads you deliver to sales are more likely to be (1) the right people they should be speaking with, and (2) engaged and interested in the products and solutions your company is offering. As a marketer, it's not only our job to deliver the right types of leads, but to also warm these leads up and reduce the friction a salesperson may encounter when speaking with a prospect for the first time.

### LI: How can LinkedIn help sales and marketing better understand the buyer experience?

**PC:** A great benefit of LinkedIn is all of the rich data that professionals actively share with the platform and community. From liking and sharing content, to penning their own articles, community members bring forth a wealth of insight into what they're thinking about and what they're interested in. For sales and marketing, this is where we can really tap into the pulse of the buyer. By participating in the LinkedIn community, through groups or via Pulse articles, you have the ideal opportunity to genuinely engage with the people that you are marketing or selling to and understand what's top of mind for these buyers. Moreover, by understanding a potential buyer's professional background, you can get a better sense of their unique needs (e.g., a sales rep who recently became a manager for the first time).



# ALISSA DETTELBACH

Marketing Manager, Demand Generation, PGI

### LI: How has sales and marketing alignment helped you improve your marketing strategy?

**AD:** By aligning with sales, our marketing strategy is more focused and targeted. We are able to home in on the key customer and prospective accounts that our sales team is selling to and help reach, engage and influence this audience. We're focusing on not only helping to generate pipeline, but also accelerate opportunities within the pipeline. That helps foster a collaborative partnership between the sales and marketing teams. Additionally, our goals for 2016 are more tightly aligned with the sales goals. Establishing the same goals forces our teams to work more closely together to define the best strategies for meeting and exceeding these objectives.

### LI: What has been the biggest workflow impact in the marketing department?

**AD:** The biggest workflow impact has been around focusing our efforts on account-based marketing. Instead of simply targeting 3-5 key personas, we are targeting three roles within our target accounts. By aligning our targets with sales' key targets, we are having to adjust some of our processes. For example, when passing leads for these target accounts, we have to ensure the leads are assigned to the correct account owner. This lead management process is manual, although we are looking to automate this process.

### LI: Has alignment helped raise the profile of the marketing department?

**AD:** I think the alignment has helped build a partnership between marketing and sales. Instead of looking to marketing as the "lead driver," we are now seen as a strategic partner in driving opportunities and influencing pipeline.

### LI: How do you gauge the success of the collaboration?

**AD:** We measure the success in many different ways. First, the marketing team is constantly asking for feedback from sales. The most effective way we can improve our programs and efforts is by understanding if the sales team finds them useful and impactful. If we aren't helping sales in their efforts (or worse, hindering their efforts), then we need to reevaluate our programs and adjust them to be more successful. With similar pipeline and revenue growth goals, it's imperative that the sales team supports our marketing efforts. Secondly, we measure our influence and impact on generating opportunities and revenue. We look at the opportunities and revenue generated by both sales and marketing to see where we are most impactful and where we can improve. Lastly, every year the marketing team sends out a scorecard survey to the sales team, which further helps us focus our efforts. This is an extensive survey, but since it is only sent annually, we receive useful feedback that helps us plan our strategy for the year.

## Step 4:

# TOOLS TO IMPROVE SALES AND MARKETING ALIGNMENT

The good news for organizations is that aligning sales and marketing doesn't require starting from scratch. Tools exist to help you find buyer information that is useful to the sales and marketing teams, which can then be used to create personalized messaging.

Our data sets LinkedIn Sales Solutions apart from any other sales tool you'll use. We've built the world's largest professional network – over 400M members strong. And we've assembled the most up-to-date information available about the buyers you need to engage. More importantly, we give you tools to translate this information into the personalized sales experience buyers expect. These tools focus on three different aspects of selling: target, understand and act.

### Target

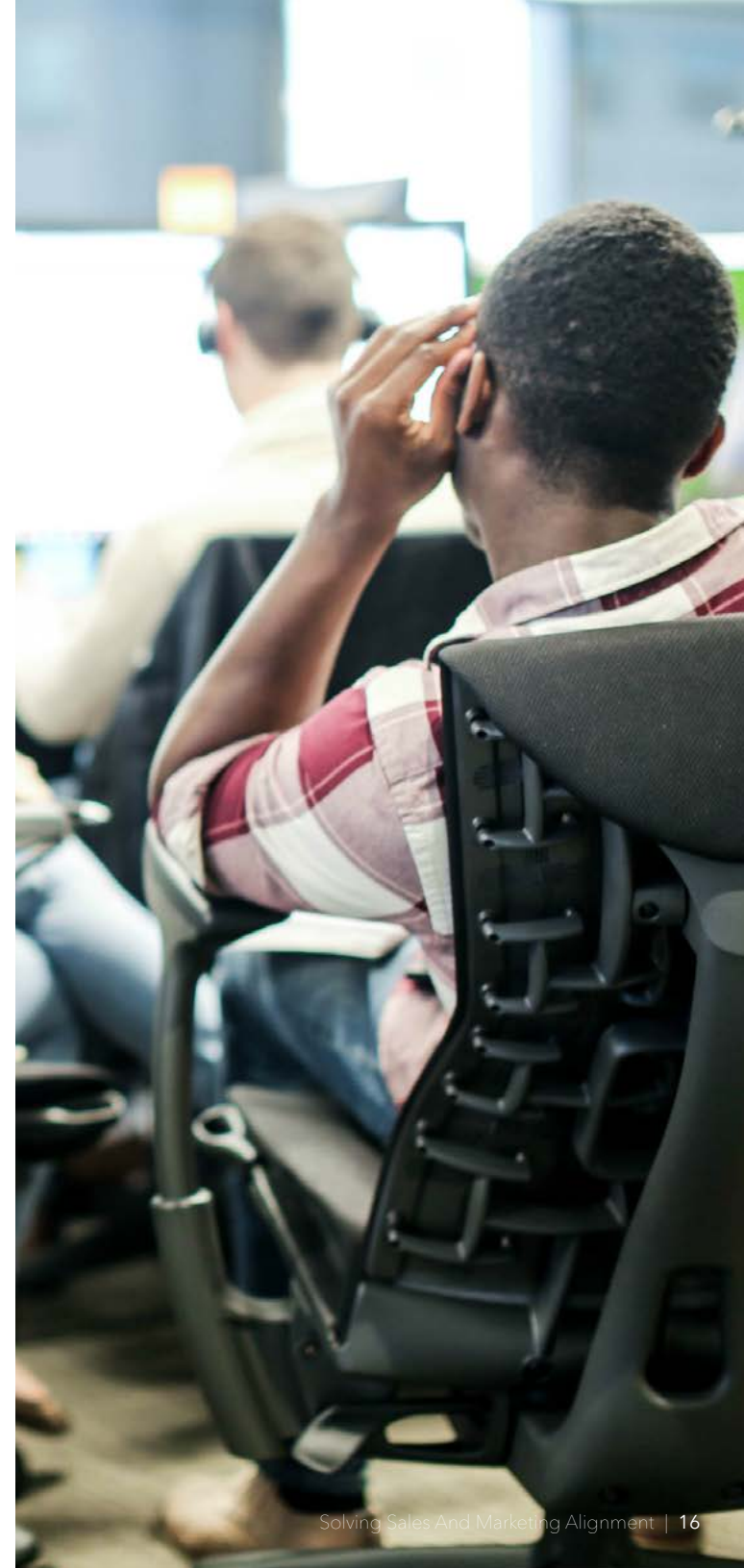
Delivering a personalized sales experience starts with targeting buyers who want to talk to you and are ready to buy. Quickly search millions of member profiles via search filters and receive automated lead recommendations that flag buyers who are sending out buying signals.

### Understand

To personalize the sales experience, you need to understand the buyer and be ready to advise him before you engage. Understand what's top-of-mind for the buyer based on a real-time feed of the content he's publishing and the updates he's sending out. Identify colleagues who have worked with him and can provide insight into his interests and needs.

### Act

Today's buyer expects you to build rapport quickly, and provide sustained value by anticipating and delivering on her needs. Identify shared interests and experiences, then send a personalized InMail to break the ice. Get a warm introduction from a colleague. Provide a steady feed of relevant content that will move the purchase decision forward.





## How LinkedIn can help sales

LinkedIn provides a driving force behind sales, helping professionals build their leads and pipelines. Through LinkedIn, professionals:

- Create 45% more opportunities
- Are 51% more likely to achieve quotas
- Are 80% more productive

LinkedIn leverages more than 433M professional profiles and tools to aid professionals in social selling. These tools include:

### LinkedIn Advanced Search

Create lead lists with custom searches to source and close deals.

### LinkedIn Saved Leads

Narrow down prospects, save profiles and be notified when they change companies or positions.

### Social Selling Index

Measure and track your social selling efforts.

## How LinkedIn can help marketers

LinkedIn provides a platform for marketers to build brands, raise awareness and generate leads.

### LinkedIn Sponsored InMail

Provide valuable content to your target audience in their LinkedIn inboxes.

### Sponsored Updates

Get your content to the top of the feed, and to the world's largest professional audience across desktops and mobile platforms.

### CRM

Import data directly into Salesforce or Microsoft Dynamics.





# JOSH NORMAND

VP of Strategic Sales, Hootsuite

### LI: What were the biggest challenges in aligning sales and marketing?

**JN:** I think sales and marketing alignment challenges come from a lack of alignment on goals. Everyone has the corporate goal of revenue and customers, but as those goals get translated down through departments (marketing often reports to something different than sales), sometimes things get lost in translation. There's always good intentions; for instance, marketing may have a good lead goal, but sometimes the tactical goals can be in conflict. Other challenges include: quantity of leads over quality of leads, and making sure things are followed up with and tracked in the right way.

### LI: What did Hootsuite do to achieve success?

**JN:** I think there are a number of things – we over-communicate at multiple levels, not meeting for the sake of meetings, we're very respectful of people's time, there's an agenda, everyone has clear roles and responsibilities. Before we go to

an onsite event, there's a ground plan – a plan to optimize the event once we're there and to change tactics when needed. When discussing goals, we discuss a successful outcome using data analytics; for instance, we know this event generated more revenue this year vs last year, etc. We have specific goals about revenue we want to drive from each event. It's about really strong communication and collaboration, everyone has ownership – it's a marketing event, but sales has a very clear goal. This all comes down to alignment at every level of the organization – everyone is acting like the CEO of that particular event and ensuring a successful outcome. There's no magic to it; it's just people coming together and collaborating.

### LI: How did using LinkedIn help sales and marketing?

**JN:** If you think about sales and marketing as a part of the same process, it's the same process of customer acquisition, and LinkedIn is essential in every stage of the process; in fact it's changed the selling process. If you think about every stage of the sales and marketing cycle: awareness,

outreach, acquisitions and advocacy, social plays a role in that entire continuum. I can't imagine someone doing social selling without incorporating LinkedIn. We're using LinkedIn to create awareness, promote brands, do account research and listen to buying signals. We're using it in the entire process: people like your brand, then recommend it, then we get to use that in the process of reaching out to our next client. We're using it to touch the entire customer lifecycle.

### LI: What were the results?

**JN:** I don't know how anyone in my role or anyone on my team could possibly achieve their goals without LinkedIn. I can absolutely point to very specific sales opportunities that were the direct result of LinkedIn. We became aware of an opportunity, found the right stakeholder to reach out to – a large portion of the selling cycle occurred on LinkedIn. There's absolute evidence that it's increasing our sales pipeline, increasing revenue. I can't imagine now a sales cycle for at least a decade where LinkedIn didn't play a role in that sales process.



# RICHARD ESSIG

VP of Corporate Strategy and Development, Nolan Financial

### **LI: What were the biggest challenges in aligning sales and marketing?**

**RE:** When a company is very successful and has grown over the years, it's difficult to introduce new marketing initiatives and there can be some rigidity facing anything new, which includes marketing and sales strategies. People will say that what we were already doing is working and ask why should we change it. So that "old versus new" tension is reflective in the nature of aligning sales and marketing, too.

### **LI: What did Nolan Financial do to achieve success?**

**RE:** I think that when a lot of new ideas emerge in an organization, the key is introducing them on a small scale, and letting the results dictate the [path forward]. For instance, we said "Let's test Sales Navigator in groups," so we tested it and got positive responses early on, and then we were able to dial up and use it more and more to really integrate it.

### **LI: How did using LinkedIn help sales and marketing?**

**RE:** Sales Navigator actually allowed us to tackle one of the biggest challenges in our industry, which was how to most successfully communicate with those really high up in a company. Since we deal with large B2B transactions in our industry, it's very important to identify those executive-level stakeholders and those decision-makers. Sales Navigator let us identify who has a connection with those stakeholders within our company, and therefore how we can most effectively reach out to them.

### **LI: What were the results?**

**RE:** When we launched Sales Navigator, the quality of our prospects and the quality of our pipeline has lit up. We used to not know if it was a firm that we wanted to do business with or if we had a good relationship with that firm, but now we've eliminated the question mark of whether the relationship is there, because we know it's there. Now our pipeline is strong, we have good prospects and we've really reduced the amount of bad prospects. About 50% to 75% of our prospects used to be bad, but now that percentage is reduced to 25%.

I can happily say we're in the process of closing our first two large deals 13 months after using Sales Navigator, so we now have revenue to stand behind it as well.





# MARCUS MURPHY

Global Partner Development Manager, Infusionsoft

### **LI: What were the biggest challenges in aligning sales and marketing?**

**MM:** We're actually kind of an anomaly because we have a sales and marketing team that is synonymous. Our marketing team drives leads through inbound marketing (e.g., E-books, speakers), and all of those leads are pushed to our lead development team, which then uses Sales Navigator to vet the leads, qualify them and escalate them to a sales executive. The marketing team is so engrained in that portion – that's our engine. The only challenge is communication, mostly if marketing doesn't know what we're looking for. It actually requires making sure marketing understands the social selling process so they can better qualify leads. Essentially, it comes down to making sure marketing understands the social selling process and what leads we are looking for so they can better qualify leads.

### **LI: What did Infusionsoft do to achieve success?**

**MM:** The biggest thing we did to achieve success was implement social selling – it's a big piece of our sales cycle. Our company leverages CRM and marketing automation, so when that's connected to LinkedIn, the leads that we spend a lot of time cultivating are put into our CRM data bank. Then, our automation can build out those leads, and that is how we achieve success.

### **LI: How did using LinkedIn help sales and marketing?**

**MM:** Our marketing team has really robust LinkedIn profiles that set the tone for how our sales profiles should be shaped. Also, LinkedIn gave our sales team the ability to compile the type of information that works for our sales team. Personally, I love Sales Navigator because I can track SSI scores and I can see ROI, that way our sales team can give direct feedback that can actually shape our marketing. For instance, saying, "hey this article is great," or "this didn't get a lot of traction."

### **LI: What were the results?**

**MM:** With Sales Navigator, we saw the lack of a short-term satisfaction mindset: we saw partners staying longer because they built a more solid relationship with us. We felt like we earned their business and built a long-lasting relationship, that we went through the full sales process and then fully onboarded them. We retained more long-term customers because there was less of a pressure sale upfront. Sales Navigator, coupled with tactical salespeople, gave us a huge advantage. To me, there's nothing better than it on the planet.



# DEBBIE FARESE

Director of Marketing, Hubspot

### LI: What were the biggest challenges in aligning sales and marketing?

**DF:** The biggest challenges tend to be that both groups are extremely busy and can get caught up in their own short-term goals. Marketing's most direct goals tend to be generating leads, while for sales, it is to close customers. So each party needs to be reminded that they are all trying to solve for the same thing: the customer. At the end of the day we each have a different role to play in making that happen.

### LI: What did Hubspot do to achieve success?

**DF:** There are a few key things that we've done. The first is that we've created an SLA between marketing and sales. A specific example of that is that our marketing team has a number of marketing qualified leads that they're committed to delivering to the sales team every month, which is a mutually agreed-upon number. On the flip side, the sales team has committed to

working those leads in a timely manner. Another important component is communication. Every month we hold a "Smarketing meeting," which brings together the entire marketing team and entire sales team to look back on the past month's performance, big wins and shared initiatives. The third component is the dedication of marketers who work on nurturing leads and supporting sales. My team, which is the sales enablement team, is specifically dedicated to sales and marketing alignment. We organizationally sit with marketing, but physically sit with sales, so that we are very accessible to them, hear what they do and are in the trenches with them.

### LI: How did using LinkedIn help sales and marketing?

**DF:** We really believe in the inbound marketing and sales philosophy; both teams want to be helpful rather than interruptive. When we use LinkedIn Sales Navigator, we're providing relevant and timely information to people. We tend to generate a lot of interest through our website, so when our sales team reaches out to those

who are interested, they can leverage insights found through LinkedIn to be more helpful and personal. Sales and marketing stay aligned through this inbound marketing mentality, as well as by using LinkedIn.

### LI: What were the results?

**DF:** It's helped us to have more relevant and helpful conversations, and speak to people who are evaluating our products and services on their terms. The way people shop and buy has changed so much ... they want a salesperson to be helpful. By using LinkedIn, salespeople have information about their buyers and are therefore having more effective, helpful and fruitful conversations.

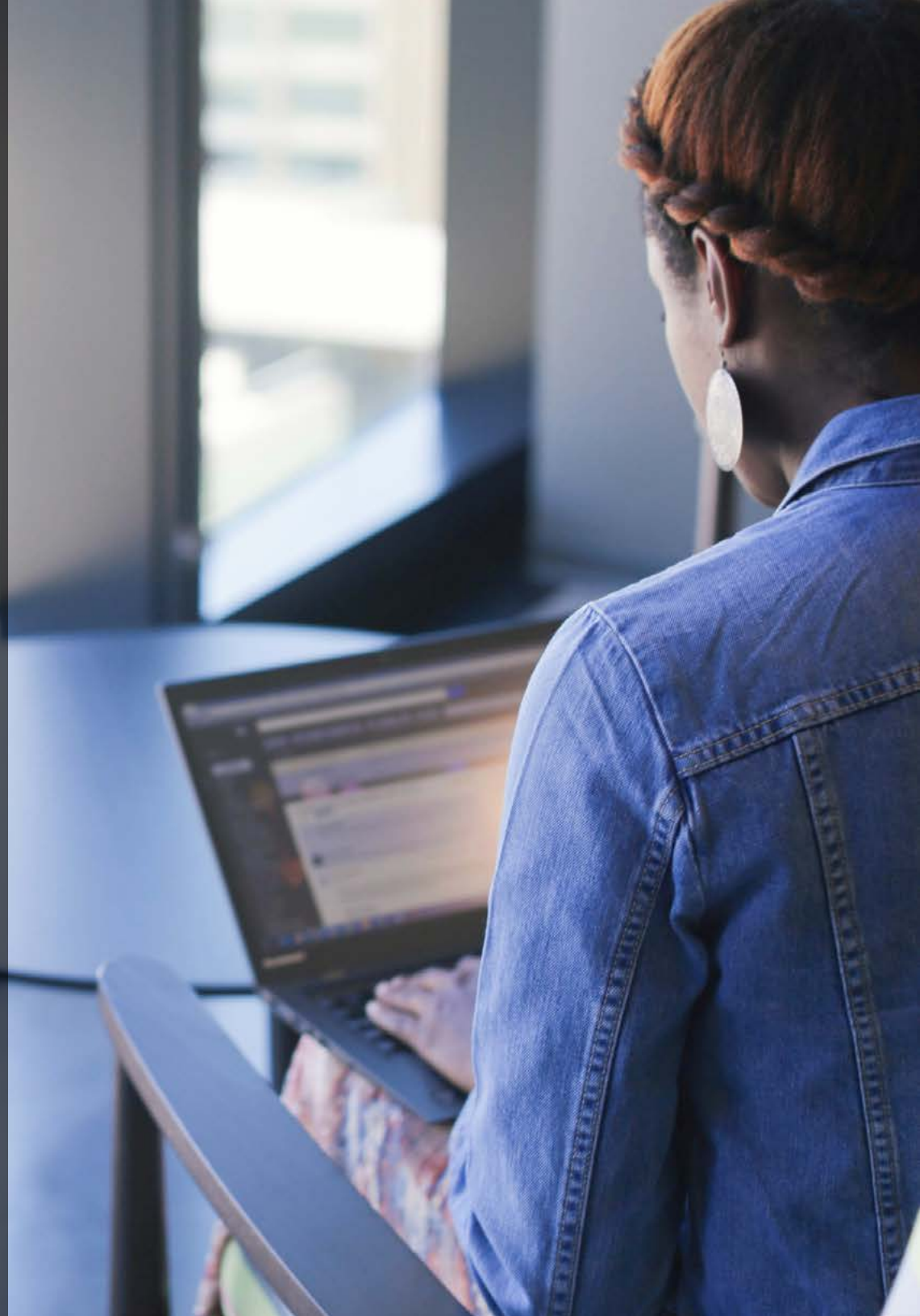
# CASE STUDIES

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Think of a great brand experience and Netflix might come to mind. The online movie company not only understands their audiences, but can tailor the experience for each individual preference. The result? Less work on your end. You don't have to tell them what you want because they already know.

Regardless of your region or industry, you want to mimic best practices from the companies that do it well so you can do it at your own company.

Here's how Dell, American Express and HCL provided a consistent and personalized sales and marketing experience, which ultimately boosted sales.



# DELL ALIGNMENT RESULTS IN AWARD-WINNING LEAD GEN PROGRAM

Round Rock, TX-based technology giant Dell boasts a wide portfolio of products and services, ranging from consumer-grade laptops and desktops to enterprise-class servers, networking equipment, and consulting and application services. With such diverse offerings, the “spray and pray” method of pushing out content to everyone who downloads a white paper isn’t effective. Content needs to be personalized, not generic, and be part of a lead nurture program.

If a business is a storefront, and customers are lining up to enter, the difference between a brick and mortar store is that anyone can come in, browse and find a sales associate to help with a purchase. However, that doesn’t happen online; the situation is more like a screener is standing at the doorway, asking prospects if they’re ready to buy. If they are, the screener sends the prospect to the appropriate sales associate; if not, they’re told to come back when they’re ready.

Dell’s goal was to keep engaging those prospects until they were ready to purchase, offering them personalized information in a lead nurture program that was tailored to their interests. The end result would be a nurture strategy that took into account unique customer scenarios and enable customers to consume content relevant to

their needs. It would help them stand out against the competition, align content to the buying cycle and focus content on critical information that answered customers’ unasked questions.

But to do that, Dell needed to align sales and marketing teams to define the buying cycle, determine the best content to send and how to break down the content to push it to customers. Dell has specific global business units: an end user computing business unit that is responsible for client product marketing for laptops and desktops, as well as an enterprise group that focuses on the enterprise solutions such as storage, big data and cloud computing. At the highest level, these two groups determine what the marketing stories are and what the priority products are, according to Paul Jackson, Global

Marketing Consultant. These groups are the pipeline that feeds the content inventory.

The end user computing business unit and the enterprise group collaborate on the content, and organize it in a way that’s accessible with automation tools, and that helps them to best respond to conversations with customers. Sales coordination is a little different; sales views this solution as sales enablement that takes the not-ready prospects and keeps working them. Automation is what pulls the program together, taking leads, and using rules and logic to send a prospect to a specific account representative, identify topics of interest and the like.

To enable what could be potentially thousands of conversions, Dell needed a lot of modular



## CASE STUDY: **DELL**

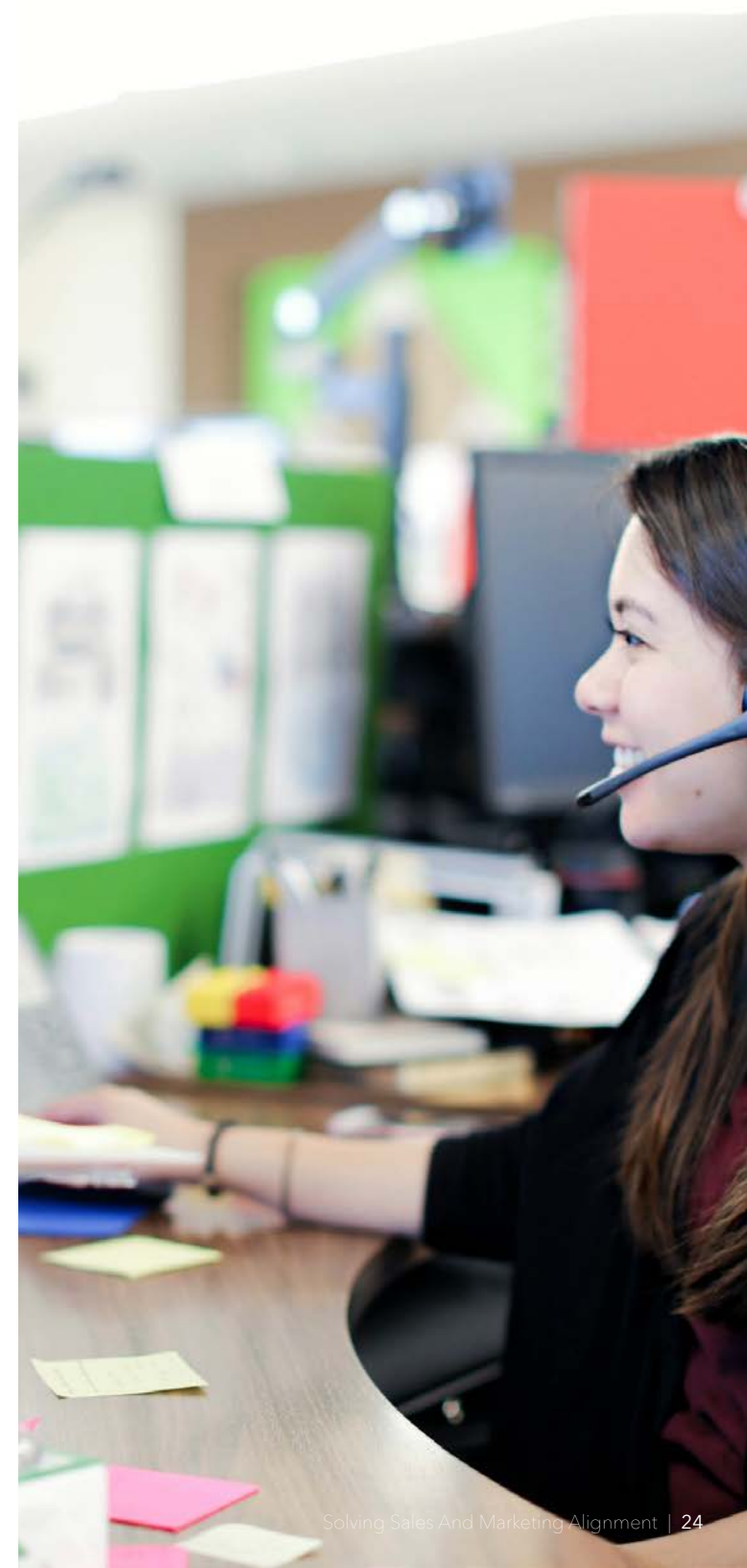
content. Instead of traditional emails, Dell developed interchangeable content blocks driven by the platforms used and the customers' interests. Contacts are entered into the lead nurturing program as a result of analyzing digital behavioral activity, commonly from the Dell website: product pages visited, assets downloaded. This is also integrated with databases of event attendees, so Dell is able to identify who the attendees are, what companies they work for and what their areas of interest are. If the customer isn't deemed "sales ready," the customer is entered into the lead nurture program to continue and sustain the conversation that began at the initial website or event contact.

The rules of the automation try to interpret behavior based on the source of the lead, whether it's email, direct mail, online advertising or something else. Coupled with the topic that the customer is engaging with, Dell uses automated logic that assigns a value and triggers the type of content that goes out to the prospect.

For example, a customer (an IT decision-maker) may be looking at a page on big data. She downloads a white paper, triggering logic that will send her an email

about three different facets of big data. It's done non-invasively, no pricing information included, so that it's helpful information on big data. Ideally, the customer will click on a topic or watch a video to learn more, which helps Dell respond more specifically. On the flip side, if the customer doesn't engage with the email, the program waits, then sends a slightly different follow-up to help the customer course-correct to what interests her. Dell created over 18,000 global modular content elements, featuring 1,200 assets and supporting 25 solution topics across 10 global programs.

The results speak for themselves: Dell's lead nurture program has delivered a 35% higher average order value for nurtured contacts versus non-nurtured contacts. Contacts have also engaged in personalized nurture emails 300% more than traditional "push" messages. By developing personalized content and working to align sales and marketing, Dell has won coveted awards for its content, including Demand Gen Report's Killer Content Award and Oracle's Markie award. And, of course, it has boosted the bottom line. The lesson learned is to get personal with sales and marketing – meeting and exceeding customer expectations.



# MARKETING-DRIVEN INITIATIVE PLAYS KEY ROLE IN AMEX CONTENT HUB

American Express and its Global Corporate Payments (GCP) division wanted to position themselves as leaders in the corporate travel industry. To do that, they would need distinguishing content to provide their audience, as well as engage with prospects, customers and their employees themselves. The company's efforts began in the marketing department, but sales played a large role, as well, to help American Express reach its goals – and in the process, won a Killer Content Award from Demand Gen Report.

A partnership with the Global Business Travel Association (GBTA) led to a comprehensive research report that focused on the experience and satisfaction of business travelers worldwide. The primary goal was to educate companies and suppliers about which aspects of business travel, including expense management and technology, needed attention.

To do that, from a content perspective, American Express launched a social selling pilot working team. This team was comprised of different employees across a broad swath of departments – including sales and marketing – and geographic locations. Marketing established the team, but sales and account development were the main participants to provide customer insight.

American Express created a content hub within the Global Corporate Payments section of its website, which featured the original research with GBTA. It also added supplementary assets, such as blog articles, listicles, infographics and event presentations – all based on customer insight.

The working team updated the content calendar and identified content to promote. Behind the scenes, American Express cultivated content by surveying customers and looking at it from the customer's point of view. This way, the team could provide feedback ahead of time based on what customers were saying, as well as review interactions with previous content. That way, if a product announcement was coming, or customer feedback had indicated a pressing new problem with business travel, the team could be prepared

to share it in a way relevant to American Express customers. "We really based the content on what our customers care about, their main pain points around business travel," said Pablo Rivero, Director of Strategy and Business Planning.

With a lot of testing and refining, American Express chose varied channels to distribute its content. Partnering with its public relations team and GBTA's public relations team helped it gain reach from industry publications, which customers are reading. In addition to press outreach, American Express also leveraged event activation, digital activation and social engagement to build awareness around the research. Paid, earned and owned media channels, including the use of LinkedIn, helped boost the content hub's profile. Every channel

## CASE STUDY: **AMERICAN EXPRESS**

took a 360-degree approach; from its own channels, American Express used email, newsletters and social distribution.

The end results were impressive: American Express garnered a reach of more than 100 million publications and over 1,500 page visits. On LinkedIn, American Express achieved a 100% higher engagement rate than the Financial Services benchmark. A great deal of the traffic was organic and earned. Additionally, 20% of the content hub's followers are American Express employees, which helps keep them engaged.

American Express took survey data and was able to extend its life by involving sales and business development to provide customer insight. Then, it could support additional content assets and different formats for content, creating a place for its customers to get information on topics relevant to them.

"We were so successful because we didn't just push content related to the product," Rivero said. The content that American Express published, based on what the customers wanted, included insights, findings and recommendations that had nothing to do with American Express, like pieces on business traveler preferences, mobile connectivity and safety for business travelers. The idea was to generate interest for customers, so that even if American Express wasn't the solution to the problem, the content hub could point readers in the right direction.





# STRONGER ALIGNMENT THROUGH LINKEDIN SALES NAVIGATOR

HCL Technologies, a global IT services company, has a sizable sales force that pursues complex deals globally and across industries, including Fortune 500 companies. The company faced alignment and collaboration issues between the sales and marketing team, which was affecting its ability to pinpoint marketing-qualified and sales-accepted leads. HCL also understood that buyers are doing so much of their research online with no sales contact at all, so it needed a new sales enablement approach to engage buyers.

Last year, HCL began the process of selecting and implementing a marketing automation platform and, more recently, it has begun to incorporate LinkedIn Sales Navigator after an evaluation period showed promise. That, in turn, is integrated into its CRM to ensure adoption.

Both sales and marketing professionals within HCL received licenses to the tool. "Our marketing team is also active on LinkedIn – they use Sales Navigator to research accounts we're targeting, and they create content that's most relevant and helpful for them," said Ramanathan Sivasubramaniam, Global Head of Sales & Marketing Excellence, HCL Technologies. "That

gives our sales team a really effective tool to build a meaningful rapport."

The response was overwhelming. Ninety percent of HCL sales users agreed LinkedIn Sales Navigator helped them identify and learn more about decision-makers.

"We track and encourage our teams by using LinkedIn's Social Selling Index (SSI) as one of our main KPIs. It's useful for benchmarking ourselves against our peers and seeing where we need to step up our training," Sivasubramaniam said.



**"LinkedIn Sales Navigator is a very important part of our sales and marketing strategy. It's helped us deepen our relationships with customers, and in doing so, deliver on our brand promise."**

– Ramanathan Sivasubramaniam,  
Global Head of Sales & Marketing Excellence,  
HCL Technologies



## CASE STUDY: HCL

"One of the key programs my team runs is publishing a monthly newsletter focused around Sales Navigator. It has an internal leaderboard, so everyone can see where they stand, and it includes success stories. That allows us to inspire each other and learn from our collective experiences – building relationships internally, as well as externally."

As a result of implementing Sales Navigator, the sales team made \$500 million worth of deals in contract value and they increased InMails 200% sent within two quarters. In addition, users of Sales Navigator, on average, had 17 times more connections than non-users, and were able to connect with more than 7,000 decision-makers in just six months of use.

"For any B2B marketer or sales professional, Sales Navigator is a must," Sivasubramaniam said. "We've been using the product for three years and have seen much improvement."



# CONCLUSION

Sales and marketing can no longer exist in silos. Being able to align the two departments is critical when it comes to delivering personalized content to customers, and that requires finding the discrepancies between the departments and working to fix them. For some companies, that may require defining what exactly is a lead and when it should be handed off to sales; for others, it may necessitate breaking down misconceptions.

It's not that the departments are working at cross-purposes; both want the same results, and they both know that they need customer intelligence to drive successful prospecting and personalized content. It's this tailored content that will drive engagement and sales, and it requires defining the audience and learning its consumption habits.

## **Define Your Audience**

Using social tools, you'll be able to obtain customer intelligence, including their pain points and preferences. Your audience may include buyers with differing levels within

their companies, each with their own needs and motivations, and the context that you can gain will help you market and sell to them.

## **Identify Sales And Marketing Gaps**

Sometimes it's difficult to isolate the root cause. However, analyzing prior sales and marketing performance, assessing current sales and marketing processes and strategy, and surveying customers – going straight to the horse's mouth – can go a long way toward finding the weak spots that are hindering your sales and marketing alignment.

## **Develop Processes To Bridge The Gaps**

Get sales and marketing to agree on goals, as well as determine the lead process, the definition of what a lead is and how these leads will be provided to sales. Additionally, developing service level agreements for sales and marketing based on agreed-upon performance metrics helps remove the guesswork.

## **Investigate Tools To Streamline Alignment And Provide Updated Buyer Information**

Tools such as LinkedIn Sales Navigator will help you target likely buyers, understand their motivations and needs, and build the rapport necessary to deliver on those needs.

Every organization has the opportunity to reach its full potential by aligning sales and marketing. As the testimony of these experts demonstrates, the practices that lead to successfully breaking down silos and creating personalized content may not be as complex as most people think. The key is to know your buyers, know your weaknesses, bridge the gaps and be ready to introduce tools to make the process easier. By following the advice from these experts, you'll be able to do just that.

**For more information on LinkedIn Sales Navigator, [click here](#).**