

Time for Marketing to Synchronize with Sales

By Mary Sullivan

Last month KickStart Accelerator published Janet Gregory's [Five Crucial Considerations for Sales Planning](#). Janet talked about the fundamentals of a good sales planning process and mentioned the importance of marketing's partnership in sales planning. It seems like common sense that marketing and sales should be in sync, so why do so many marketing teams do their planning in isolation from the sales organization?

The Marketing Cycle and the Sales Cycle

Traditionally, the reason marketing and sales did their planning separately was because they operated on different cycles arising from different inputs and objectives.

Marketing planning was typically governed by two types of inputs: the budget cycle and the product roadmap. Marketing plans continue, too often, to be created in the context of the annual budget process. This ties primarily to the fiscal year, with adjustments made as needed to accommodate new product introductions.

Sales planning was, and is, revenue-driven, not budget-driven, and usually happens annually with a heavy quarterly component. It is based on historical sales performance and is tweaked to do more of what worked in the past and less of what didn't go well.

The disparity originated when businesses lacked the ability to connect marketing costs with revenue. But those days are over. Marketing and sales automation tools allow closed loop tracking of opportunities through the entire sales cycle from lead gen campaign to prospect through to closed (or lost) business. And now marketing has the ability to measure how effective their efforts are and to understand how long the average sales cycle really is. ([Mary Gospe](#), author of [Demand Generation Automation for B-to-B Marketers](#) in this issue can help you select and implement sales and marketing automation tools.) So it's time for marketing to abandon old planning habits and sync up with sales planning.

Start the Conversation

If your marketing team still isn't including sales in the marketing planning process, and sales is not including you in their sales planning, someone needs to start the conversation. Anyone can start it. Kick off 2008 with a high level marketing-sales management conversation about assumptions, goals and objectives. If you need to get off-site together with a facilitator to start building the relationship, do it. ([Mike Gospe](#) of KickStart Alliance can help facilitate your initial meeting.)

Identify Common Objectives

Top-down – Both marketing and sales will probably be asked to support corporate strategic objectives (originated outside of their domains). These may include a new corporate vision, geographic focus, year-over-year growth targets, or market share goals. They may also be

aggregations of business unit goals. Both marketing and sales need to meet the top-down objectives.

Bottom-up – The individual objectives from the Marketing and Sales teams may not be in sync. Marketing may have identified market segment (vertical) goals, while Sales may be focused on account segment (major accounts, etc.) goals. It is essential that both sides agree on where the focus will be for the planning period.

Share Calendars

Sales cycle – Use your closed-loop metrics from past years to agree on how long it takes, from first prospect contact to close of sale and perhaps even to installation and/or delivery, to determine when marketing needs to generate leads for future revenue. If you have a six-month sales cycle and it takes 90 days after the close to take revenue, marketing needs to initiate a lead gen campaign in Q1 to help drive revenue before the end of the fiscal year.

Product cycle – Make your best assumptions about when a new product will launch and what new revenue can be attributed to it. If it isn't replacing an existing product, presumably it will generate additional revenue. Make sure Sales knows when it will be coming so they can build training and revenue projections into their sales plan. If sales of an old product will be ending, determine what if anything will replace it, because it could have adverse impact on revenue forecasts.

Agree on Target Markets

Agree upon the profiles of customers your company wants to reach during this planning period. This could be company size and an associated average size of sale, which could have major implications on the qualifications of sales reps hired, quotas and other factors. If Sales is targeting verticals and Marketing is doing horizontal marketing campaigns, you'll be at loggerheads, diminishing the value of each other's efforts. Include target markets in the conversation.

Refine the Understanding

Both marketing and sales have responsibilities for the sales pipeline. Marketing needs to create awareness and interest, and nurture prospects until they become qualified leads before wasting Sales' time on them.

Do the Math

- How many qualified prospects does Sales need in order to achieve overall quota expectations based on historical close rates?
- How many leads (raw inquiries) does it take to convert to qualified prospects?
- How many direct marketing hits does it take to accumulate the necessary number of leads?
- How long is the sales cycle?
- When do new qualified prospects need to be brought into the pipeline in order to meet the downstream revenue goal?

Marketing campaigns need to be scheduled and developed to support the necessary number of qualified prospects at the appropriate times in order to keep the pipeline steadily full throughout the year. Develop metrics together and review them jointly throughout the year.

Support the Channel

If you are a multi-channel organization, subdivide your marketing plan to support the objectives for each channel. Is the sales cycle different for direct vs. indirect sales, either due to product line difference, size of sale or selling methods? Give marketing plans for each

channel equal amounts of care and attention, with an understanding of what the revenue goal is for each channel.

Collaborate on the Lead Qualification Process

Both sides need to agree on the definition of a lead that is sales-ready. Too many companies lose opportunities because marketing thinks a lead is mature before sales does. Potential customers may be dropped from focus at a critical point in the sales cycle because each side believes the other is caring for the opportunity. When decision time comes, the prospect may buy from someone else for lack of attention by your company.

Keep the Conversation Going

Use Information portals, wikis

Use a single prospect database (sales force automation tool) and move opportunities through the pipeline so both sides see what's coming and can measure results. Place field sales information and tools on a sales-marketing portal with a logical taxonomy and a robust search function. Use wikis for competitive information so it can be easily maintained by the field based on actual feedback from prospects.

Maintain a Shared Marketing and Sales Calendar

Include in your marketing-sales portal a shared calendar with trade shows, events, promotional pricing deadlines, booking close-off dates for the quarter, and any other information that is pertinent to both marketing and sales.

Use Messages Consistently

Marketing can help assure that sales uses the appropriate messages by developing sales playbooks with selling guides, objection handling tools, competitive positioning and impactful sales presentations *with speaker notes*. Make this information easily accessible to sales in grab-and-go formats that reps can access from the field.

Support After-Market Sales

Don't forget customers once you've taken revenue from a sale. Understand who is responsible for after-market sales for which types of customers, and what their revenue goals are. Include these groups in the conversation so appropriate cross-sell and up-sell campaigns can be included in marketing plans.

Make Mid-Year Adjustments

Discuss after each quarter how your marketing-sales partnership is working. If sales needs to increase revenue, marketing needs to be prepared with pricing adjustments or promotions. Make sure that Sales agrees that the leads they are getting are really sales-ready.

Aligning Marketing and Sales for Results

When you get the marketing team and the sales team working together, one plus one will equal more than two. You have the opportunity to increase revenue and shorten the sales cycle. Marketing and sales are both simply more effective when their plans are synchronized.

Mary Sullivan is a co-founder of KickStart Alliance and has held sales, marketing and product management positions through her more than 20 years in tech. For more information on how to optimize the alignment of your marketing and sales programs and

plans, please [contact Mary](#). And visit www.kickstartall.com/resources to find more helpful articles on this subject.