



The 5 Best Practices of Sales and Marketing Alignment

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Why sales and marketing silos fail and true alignment drives success

Whether you embrace the smarketing buzzword or not, sales and marketing alignment is a must to create a highly-effective lead generation program.

Higher revenue and lower costs can follow [according to HBR:](#)

“...there is no question that, when Sales and Marketing work well together, companies see substantial improvement on important performance metrics: Sales cycles are shorter, market-entry costs go down, and the cost of sales is lower.”

A [recent study](#) of more than 1,200 sales and marketing leaders by Freshworks detailed some quantifiable gains from sales-marketing alignment.

Case in point: **sales professionals in organizations where the two teams are “highly-aligned” on objectives were able to bring in 20% more revenue year-over-year.**

Better demand generation

Sales and marketing working together can elevate success at every stage of the customer journey and your sales funnel. And technology can help you see exactly how your efforts affect revenue.

“When marketing automation was introduced it gave marketers this ability to track it... When I can go to sales and say, ‘We’ve actually driven X amount of dollars of revenue,’ that’s a really powerful thing, and it really gives marketing a seat at that sales table.”

Amanda Halle Bates, Vice President, Global Growth Marketing, Headspace Health

Organic marketing can be one of those powerhouse strategies that drive measurable revenue generation. Done right, organic marketing helps companies build a high-performing demand generation channel that delivers results over the long term.

Whether B2B, B2C, or D2C, your prospect is gathering information, comparison shopping, or determining a final transaction. You have the ability to influence and be the leader, the chosen brand, at each of these stages with a defined organic marketing strategy.

Additionally, effective organic marketing can offer measurable cost savings by helping companies save on media. For example, if you determine you are ranking well for a set of organic keywords, you can lower your paid bids and shift spending to more competitive, nonbranded keywords.

Companies can also fine-tune the balance between organic and paid search to attain efficiencies and maximize results. You can raise both visibility and credibility while driving conversions.

The road to sales and marketing misalignment

Although many companies are starting to realize the power of sales and marketing alignment, there's still work to do.

A recent [Forrester survey](#) of sales and marketing, commissioned by LinkedIn, revealed why. While most respondents rated sales and marketing alignment as “good,” that wasn't the full story. When asked about day-to-day experiences, **96% of respondents**

acknowledged that sales-marketing disconnects impeded business performances and negatively affected buyer experiences.

Clearly, overcoming this disconnect is a must to deliver positive experiences throughout the buying cycle. Focusing on solving these three common problem areas can help your organization move forward.

Siloed goals

While ultimately, marketing and sales are both responsible for bringing in business, their measures of success can be very different. Often, marketing tracks metrics like web and campaign response rates, the number of unique visitors, and the number of marketing qualified leads (MQLs) generated. Meanwhile, sales teams focus on meeting monthly and quarterly quotas.

These siloed goals can keep marketing and sales looking inward at their own department's priorities instead of working together. Misalignment is sure to follow.

Lack of transparency

Hidden goals can lead to hidden agendas that can keep sales and marketing at odds. It's also difficult for teams to work together when they don't understand the basic facts about each others' structure, terminology, roles, and technology.

Fragmented data

Marketing and sales may use different technologies in their day-to-day work, with data fragmentation as an inevitable result. One of the biggest disconnects often occurs around customer and prospect data which can reside in more than one system.

For example, if marketing doesn't know a prospect's current status, they could send outbound messages that don't sync with the conversations salespeople have been having. This can quickly stall promising pursuits and force salespeople to work harder to rebuild credibility and momentum. I know this happens to me often, leaving me to question the brand I am considering.

How to get sales and marketing to *actually* work together

Sales and marketing actually have a lot of common ground. Both teams recognize their roles in driving revenue—and want greater visibility into the pipeline.

Remember that [study of 1,200 sales and marketing leaders](#) from earlier?

Here it is again with some surprising stats:

- **54%** of salespeople rated getting more information on prospects' upper-funnel behavior as their #1 wish from marketing
- **70%** of marketers wished for more visibility into lower-funnel prospect activities from sales
- **47%** of sales professionals wanted better quality leads from marketing
- **50%** of marketers desired more sales input on campaigns

So it's clear that marketing and sales have lots to talk about once you bridge the divide. Knowing what these teams need from each other is important to bring them closer together.

What sales needs from marketing

Having intelligence about upper-funnel activities helps your sales professionals know what sparked prospects' interest so that they can continue the conversation in a consistent and meaningful way. Also, your sales team needs content that maps to the buyers' journey and helps them guide prospects through to the late-stage funnel to a closed deal.

What marketing needs from sales

Marketing needs real-world insight on what resonates with prospects in the later stages of the funnel. That intelligence can help inform what messaging works best and better map to the customer's intent. Additionally, marketing needs real-time data on closed-won deals from sales in order to analyze and find commonalities between them to inform future campaigns.

Building a feedback loop

When sales and marketing work together, they can share insights that propel lead generation forward. Having an open, collaborative back and forth is necessary to know which campaigns and messages work and which don't. Plus, marketers need to understand how

sales is following up with leads to know what types of assets may be helpful.

This isn't a one-time thing. Instead, you need a continuous feedback loop. Keep reassessing to make sure it's functioning properly and adjust as needed. Only then can you foster true alignment.

5 best practices of sales and marketing alignment

I've personally seen what happens when companies bring marketing and sales closer together. What I've learned is following these five best practices put you on the path to true, lasting alignment.

#1 Start with your people

Leaders need to foster a culture of respect and teamwork. So, a key step is for leaders in both groups to take a thoughtful look at their own mindsets.

If your marketing teams hear their chief marketing officer (CMO) complaining that salespeople don't follow up on leads, bad sentiment will fester. The same thing happens if a chief sales officer (CSO) diminishes the value of marketing.

Changing perceptions starts at the top, as

Gartner explains:

“CSOs and CMOs play separate roles and focus on distinct results in the revenue life cycle, but they must collaborate across a series of revenue-generating activities to meet their goals. **Alignment is not a status to achieve; it is a continuous path of collaboration.**”

Marketing and sales leaders can bring teams together by aligning on goals, measuring and reporting progress, and revisiting processes to remove friction.

At the sales enablement platform company, Outreach, blame isn't part of the culture. Miscommunications and misalignments happen, but Outreach focuses on fixing problems instead of pointing fingers:

“You need to decide not to have a blame-game mindset or culture. When pipeline is viewed as a shared challenge, then it becomes easier to talk about what needs to be done to improve the situation.”

Mark Kosoglow, VP of Sales, Outreach

Activities to foster collaboration

What's more, working together on key activities can create synergies and boost teamwork.

Collaborating across these five areas can deepen marketing-sales alignment:

- **Go-to-market (GTM) planning.** Although owned by marketing teams who conduct research and create personas, GTM activities can benefit from sales input. Sales professionals are in constant conversation with buyers, so they know their genuine needs and pain points.
- **Messaging.** Marketers usually define messaging, but salespeople know what truly resonates with customers. Without close coordination, disconnects happen when prospects read one thing in social posts or on websites and hear something different from sales reps.
- **Measurement.** Both sales and marketing track data, but what they measure is often different. A better way is to have both teams focused on common metrics and report on the marketing and sales funnel in one report, together!
- **Enablement.** Marketing needs to seek insight into what generates prospect interest, with sales providing input on materials during development and following deployment.
- **Operational fundamentals.** Define the revenue generation processes, describe the requirements of the technology stack to support both functions, and develop a common data governance strategy.

Joining forces in these areas helps marketers and sales professionals understand how deeply intertwined their functions are. Leaders can facilitate these connections by creating cross-departmental work teams and processes for continuous information-sharing.

#2 Implement the right process

With defined processes, you create clarity on how things get done to drive successful outcomes. When everyone is on the same page, your teams can work more efficiently and avoid missteps and miscommunications.

Time to get aligned on goals

If your sales and marketing teams have different KPIs, they are pursuing very different goals. Your marketing organization may count numbers of website visits, social shares, or event registrants as signs of success. Sales, however, is all about conversion rates and revenue targets.

Setting goals that both teams can rally around is essential to foster alignment. One best practice is to align both teams around revenue and derive marketing goals from revenue projections.

“Sales and marketing alignment is about one shared goal: revenue that is delivered or over-delivered every quarter. There will always be tension, but that tension can be positive if there is a culture of clear expectations and communication.”

Craig Rosenberg, Distinguished VP and Analyst, Gartner

You can create clarity on goals with a Sales and Marketing Playbook. Playbooks document agreed-upon deliverables, activities, definitions, and metrics so that everyone is operating with the same expectations.

Typical sales-marketing playbooks outline several key areas:

- Both party's goals
- What each organization needs from the other
- Activities each organization will pursue in support of the other team
- What happens if goals aren't met
- Shared communications channels
- Feedback loop cadence

For most organizations, it's important to revisit Playbooks quarterly to set specific, time-based expectations.

You may need more frequent Playbook updates during rapid change or fast growth.

What to Include in a Sales and Marketing Playbook

- Clarity on target audiences and customer personas
- Definition of funnel stages and explanations of key terms
- Defined lead framework with agreed-upon definitions for leads, MQLs, SALs, and SQLs
- Goals by funnel stage and timeframe (monthly, quarterly, annually)
- Confirmation of how quickly sales will follow up with SALs in days
- Number of outreach attempts by sales per lead
- Details on shared systems and processes
- Details on shared goals
- Confirmation of revenue targets
- Details on KPIs and measurement intervals
- Details on SLA review and update intervals

**MQL = Marketing Qualified Lead*

**SAL = Sales Accepted Lead*

**SQL = Sales Qualified Lead*

Align on customer personas

In many organizations, marketing teams create customer personas for target audiences based on research and data. Without sales input, however, these personas can be out-of-touch with prospects' true pain points and buying goals.

Working together to develop and refine personas is an excellent way to foster sales and marketing collaboration. Marketers can bring industry perspective, while sales provides on-the-ground insight from real prospect conversations.

“An empowered buyer is exactly what a sales and marketing organization should be targeting. Sales and marketing should unite to determine who their ideal customer is and how to reveal their latent pain and to move the customer to a place where they are more successful because of the product or service being offered.”

Claudine Bianci, Senior Vice President of Global Marketing, Redzone

Align on the value of leads

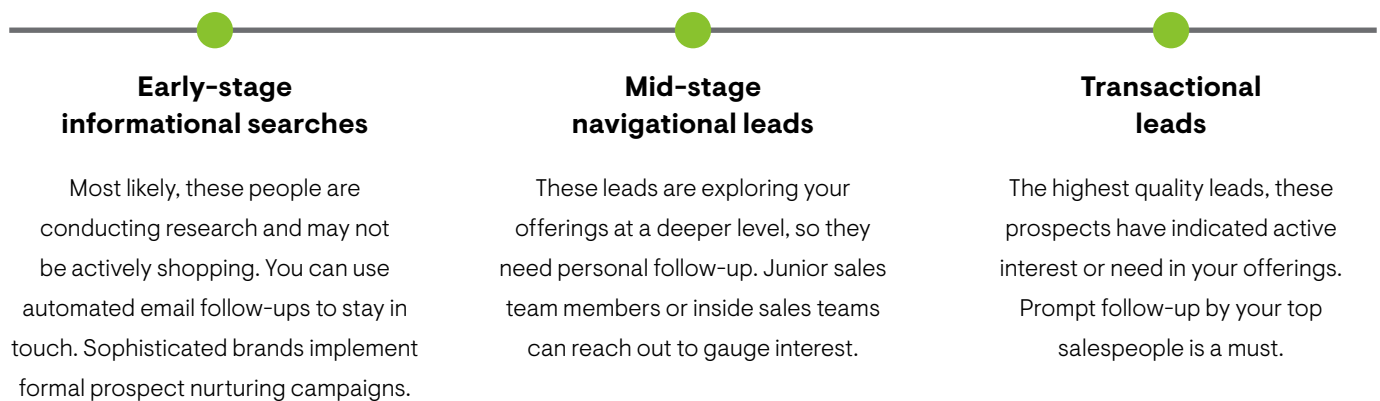
In some organizations, marketing teams dump MQLs into one big undifferentiated bucket and hand them off to sales without context. There's no easy way for sales professionals to know if the lead has expressed genuine interest to buy or merely downloaded gated collateral. That can lead to missed opportunities.

How can you fix that? Sales and marketing need to work together to build a matrix to outline qualifications for different lead classifications. Clearly outline the criteria needed to become an MQL, SAL, and SQL. Details on the prospects' query and intent stage can ensure each lead gets the right focus and follow-up.

Develop a formal lead handoff strategy

The lead handoff between marketing and sales is a critical step to maintaining sales velocity, especially for high-potential leads. However, not all leads need the same level of attention as a direct sales call. Instead of marketing simply pushing leads out to sales, you need a formal process that includes conveying lead value to help prioritize the right action.

How the lead finds you and what they do online should inform the next steps:



Provide the right training

Smarketing is just as much about education as it is alignment. Training is a great resource to inspire closer collaboration between sales and marketing. Joint sessions—whether informal lunch and learns or more substantive classes—can cover terminology, processes, and tools so that both teams understand each others' world. By building sales and marketing training into onboarding, you can get new hires off on the right start and ensure alignment from day one.

It can be especially helpful to have marketers take sales training. That way, they get a window into how salespeople communicate with prospects and handle objections. Scheduling product demos for marketers can also let them see tools in action and let them know how to play up certain features and benefits.

Implement cross-departmental collaboration to inform content and SEO strategy

Quality content, mapped to each “intent” stage, can build a brand’s value with the customer and help leads move down the funnel. It’s also especially beneficial for high-consideration purchases. But what marketers find interesting and what salespeople need can be two different things.

Having a shared content calendar where both teams can ideate on topics is immensely valuable. Another option is holding joint brainstorming meetings to talk about topics that can click with audiences.

American Express is one company that got content sharing right. When angling to grow in the corporate travel space, they used industry data and real-world sales insights to drive their content strategy. The results were impressive, garnering a reach of more than 100 million publications, 1,500 page visits, and social engagement rates 100% higher than the industry average.

Align on social and content distribution strategy

65% of marketing content goes unused by sales, according to research by Forrester. When that happens, you’re missing out on brand building and lead generation opportunities.

How can you fix this problem? Sales needs to know what content is available, why it’s valuable and how to share it with prospects and customers. Marketing can help sales amplify content by providing assets like talking points,

quotes of the week, and email templates, along with insight on what leads are viewing and downloading.

With this approach, you can ensure your content has an impact. You’ll also foster external messaging alignment, so prospects experience more consistency across upper-funnel and lower-funnel touchpoints.

#3 Foster a culture of transparency and accountability

Workplaces thrive when team members trust each other. That can only happen when honesty and openness are part of the culture. Also, team members need to know they can count on colleagues to do their part and fulfill commitments.

Culture and transparency are two pillars of a high-performing organization. This is true everywhere—but especially critical to foster sales and marketing alignment. Strong and consistent communication is the key to success. Here are some additional strategies I've found effective.

Schedule regular meetings

One of the best—and simplest—ways to boost marketing and sales alignment is to get teams together on a regular basis. This can take several forms, from quarterly kick-offs to monthly all-hands meetings to quick weekly check-ins. Every meeting is an opportunity to share actionable insights on lead generation. Plus, your teams can forge personal bonds that inspire closer collaboration.

You can also schedule time for marketers to sit in on sales calls. If joining calls live isn't always possible, using a tool like [Gong](#) lets you record sales meetings for future training purposes.

With this approach, marketers can gain a real-world perspective on prospect pain points and understand how salespeople finesse conversations. They'll learn first-hand which messages resonate and push opportunities forward. All this intel can cycle back into marketing to get prospects what they need earlier in the buying journey.

Provide visibility into hitting and missing goals

You need to focus intently on results. Sales and marketing performance should be a regular agenda item.

Keep current pipeline data and KPIs in front of your teams, ideally through a shared dashboard. Teams also need a defined way to review lead quality at a regular cadence.

Why is this important? Your sales and marketing teams need to know if they're on track to meet goals or falling behind. If there's a risk of missing targets, resolutions need to be identified, roadblocks removed, and an actionable plan to recover lost ground should be implemented.

Hold leaders and teams accountable

The Playbook you draft should make it crystal clear what each organization is doing to support the other. As mentioned, details on goals, timelines, and KPIs, along with what happens if goals aren't met, are imperative.

Leaders of both organizations need to take ownership of their specific objectives. Joint sales-marketing goals should be the basis of performance measures at the individual and organization levels. Each team should fully understand their responsibilities and that there is no blame game. When targets are not met, it's a team effort to develop the plan to get back on track.

#4 Integrate your technologies

While technology can make many marketing and sales tasks much easier, a lack of integration can be a roadblock to alignment. In some organizations, marketing and sales manage two different sets of customer and prospect data in disconnected systems.

Sales has CRM solutions to track contacts, outreach, and deal status. Meanwhile, marketing automation tools have a distinct dataset used for outbound multi-channel campaigns.

Complicating things even further, when these two systems don't talk to each other, marketing and sales have to resort to workarounds to touch base on any contact updates or insights. With so many other things vying for attention in a typical workday, it's all too easy for this high-value communication to fall through the cracks.

Any communications barriers can impede the feedback loop that's necessary for pursuing effective campaigns and driving deals forward. It's essential to make it easy for sales and marketing teams to connect, no matter where they're working.

What's critical here is understanding you have this problem and setting a path for change. There is no simple fix. You will need a champion to run this data-sharing transformation.

One example of a tool that can help with shared communication assets is [Guru](#), software that integrates with the tech stack your teams already use and brings communications into one place. That way, up-to-date information is available to everyone at all times to improve sales enablement.

#5 Materialize measurement: Report regularly on your results, together

It's not enough to set shared sales and marketing KPIs. You need to monitor and report regularly to keep teams aware and moving steadily towards goals. Also, if your KPIs show you aren't on track to hit targets, you need to know sooner rather than later. That allows you to unearth the root cause, adapt, and keep pressing forward.

Track and report—rinse and repeat

Your reporting needs to tie back to the goals you set in your sales-marketing SLA. Specifically, your teams need to know if they're tracking towards revenue goals and on a path to meet supporting KPIs, such as the number of closed-won deals or the number of quality MQLs handed off to sales and their associated conversion rates.

Shared goals keep everyone focused on the same outcome. Reporting on those goals ensures all sales and marketing team members know the current state and can do whatever is necessary to achieve success.

Implement a regular reporting cadence

Frequent reports keep everyone focused and aligned. It's important to establish and maintain a consistent reporting cadence so that everyone knows what to expect.

In many organizations, a three-level reporting process works to keep everyone in sync:

- **2x Weekly.** Report to executives and key sales and marketing leaders.
- **Weekly.** Report to sales and marketing teams.
- **Monthly or quarterly.** Report to key departments or the entire company.

With that approach, you improve transparency and accountability by letting everyone know where sales and marketing stand. You can also celebrate wins and rally the team to keep pushing towards goals.

Utilize the same dashboards and data

With the right technology, you can automate reporting to keep everyone on the same page. Use a dashboard solution to create data visualizations and make them accessible to your sales and marketing team members. While you can still push out reports at predetermined intervals, dashboard access can give everyone at-a-glance insight into the current state of sales and marketing KPIs.

Your sales-marketing SLA should clarify not only what data you'll track but exactly how you'll calculate it. When you build those metrics

into your dashboard, you can keep a pulse on critical KPIs and ensure everyone stays informed. Closer alignment between sales and marketing is sure to follow.

One company that knows all about the [power of sharing data](#) is Nextiva, a cloud-based communications company. Nextiva uses data and lead sizes to help marketing and sales see the current state of the pipeline. Plus, marketers use feedback on leads to adjust their search strategies and drive more of the right traffic.



Conclusion

The difference between successful brands that hit and surpass their revenue goals and those that do not lie in the intricacies of cross-functional collaboration. Misalignment between sales and marketing teams directly affects your brand's bottom line. Alignment facilitates agility and agility is the key to success. It's important to take stock of the state of the sales and marketing relationship in your company and make a plan to foster a culture of transparency and alignment.

When sales and marketing work together, the effect is truly transformative. Just ask American Express, Nextiva, and Outreach.

The two teams keep a sharp focus on revenue targets and work collaboratively towards shared goals. They build clear Playbooks that define key processes, initiatives, and objectives so everyone is progressing toward the same outcomes. Leaders take accountability for results, as do teams, and regular reporting keeps everyone informed on performance against KPIs. When this happens, your teams can reach and exceed revenue targets, drive innovations, and position your business for enduring success.



Learn more about how to help drive marketing and sales success with a proven SEO platform by watching our [3-minute platform tour](#)

About Conductor

Conductor is the world's leading organic marketing platform, helping businesses accelerate search traffic, digital growth and revenue. Conductor's technology helps marketers create powerful marketing content to drive quality traffic to their site and track their organic performance. Websites are more valuable than ever and getting found online is a #1 enterprise priority.