



Integrating Marketing & Sales Execution

Transforming people, process and technology for a more customer-centric go-to-market approach

Whilst high-performing organisations have always sought close alignment between marketing and sales, new levels of operational integration are required to deliver the experience today's customer demands. Legacy functional silos must be genuinely dissolved, with new levels of connectedness and collaboration required to hardwire relevant marketing and sales execution around the customer.

People, process and technology transformation is required to integrate marketing and sales execution and operationalise a more digitally-enabled, integrated and customer-centric go-to-market model. Drawing on a wide range of transformation projects undertaken by Blackdot, this whitepaper provides a proven pathway for going beyond alignment to accelerate true marketing and sales integration.

A NEW IMPERATIVE FOR MARKETING & SALES INTEGRATION

The concept of more effectively aligning marketing and sales is far from new, with a wealth of literature highlighting the value of closer collaboration. Amongst the key benefits are tighter management of leads and opportunities, improved targeting, more efficient and effective use of sales time, greater return-on-investment of marketing spend, increased revenue – the list goes on.

However, despite these promised benefits, most organisations have struggled to genuinely achieve marketing and sales alignment. It is an exceedingly difficult challenge – one that requires overcoming the historical cultural differences and functional silos embedded into an organisation over a long period of time. Against this backdrop of legacy challenges, the rise of the ‘new’ digitally-empowered buyer has dramatically increased

both the imperative and complexity of breaking down the age-old divisions between marketing and sales.

With today’s customer preferring to self-educate online, they are increasingly interacting across multiple channels (and hence the functions supporting these channels), switching between them far more frequently and demanding more relevance than ever before. This far more dynamic buyer’s journey has profound implications for how marketing and sales need to work with each other. The goal of alignment is no longer enough to meet customer expectations.

Genuine operational integration of marketing and sales functions is now required to deliver the more agile and seamless go-to-market approach necessary for success.

THE PAYOFF OF SUCCESSFUL INTEGRATION

		
ENHANCED CUSTOMER LOYALTY & ADVOCACY	ACCELERATED MARKET SHARE GROWTH	IMPROVED PROFITABILITY
<ul style="list-style-type: none">• Greater value and relevance for customers• Higher engagement and satisfaction across customer-facing staff• Greater upsell, referrals and advocacy	<ul style="list-style-type: none">• Higher quality lead-flow• More effective marketing and sales execution	<ul style="list-style-type: none">• More efficient marketing and sales execution• Lower costs to sell and serve• Automation of lower value tasks

A PATHWAY TO CUSTOMER-CENTRIC MARKETING & SALES TRANSFORMATION

Whilst every organisation's journey will inevitably be different, we have identified three broad stages that businesses typically navigate through on the pathway to transforming marketing and sales around today's customer. Before embarking on the second stage of 'integrating marketing and sales execution', the organisation should firmly set the foundations for transformation in the first stage 'operational pivot to

customer'. In this stage, customer-centricity starts to become a genuine operational imperative – with the business fully committed to fundamentally reorganising around the customer. With this 'customer pivot' well underway, the business is positioned to begin stage two, where you will test, prove and evolve a whole new marketing and sales execution engine.

THE THREE KEY STAGES ON THE PATHWAY TO DIGITAL GO-TO-MARKET TRANSFORMATION

#	OPERATIONALLY PIVOT TO CUSTOMER	INTEGRATE MARKETING & SALES EXECUTION	DELIVER RELEVANCE, AT SCALE
1	Secure Executive Sponsorship & Educate the Business Cross-functional sponsorship & business-wide understanding will dictate likelihood and rate of success	Lift Role & Goal Clarity Clearly defined accountabilities, KPIs and incentives are required to embed new ways of working	Break Down Enduring Silos Any remaining data, technology or functional silos must be addressed to deliver the omnichannel experience
2	Sharpen Market Segmentation Alignment across product, marketing and sales on priority audiences is critical to achieving scaled relevance	Build New Capabilities New marketing and sales skillsets are required for a more digital and data-centric operating environment	Scale Demand Generation 'Always-on' automated campaigns are required to support scaled one-to-one digital engagement
3	Map Personas & Buyer Journeys Detailed understanding of how customers buy and their preferences must underpin all execution	Develop Cross-Functional Planning Processes How each function and channel collaborate must be clear across the buyer's journey to enhance cohesion	Digitise Frontline Selling CRM optimisation and productivity tools must create sales capacity & maximise time spent with customers
4	Develop Content Strategy Compelling content is essential to engaging buyers and facilitating progress across the buying journey	Design Lead Handover & Recycling Processes Robust processes must support responsive and effective sales follow-up of marketing-qualified leads	Enhance Dynamic Content & Personalisation Maturing platforms, data and content enable the expansion of increasingly individualised interactions
5	Evolve Channel Strategy The marketing and sales channel mix must deliver an enhanced customer experience at lower cost	Embed an Integrated Operating Rhythm Joint marketing and sales forums and dashboards are key to ensuring ongoing collaboration and review	Optimise Attribution & Customer Analytics Understanding performance across the end-to-end buyer's journey is key to driving ongoing improvement
6	Validate Technology & Data Foundations Data must be accurate and core platforms must enable marketing & sales to be responsive & relevant	Hardwire Technology-Enabled Execution Automated processes, workflows and alerts are imperative to scale more integrated ways of working	Leverage Data For Continuous Improvement Customer insights must be continually utilised to drive a culture of 'restless excellence'

STEP ONE – RESET ROLE & GOAL CLARITY

At this stage of your marketing and sales transformation, you will have a much deeper understanding of who your customers are and how they buy. In order to deliver the relevance and value that your customers expect, whilst at the same time reducing the cost of sale, a fundamental evolution of both organisational design and the channel mix is typically required. New channels and roles often need to be introduced to ensure you can deliver the right interactions, to the right customers, at the right time.

With the channel mix evolving, ensuring the operating model is adjusted to support these shifts is critical. To ensure the right people are aligned to the right opportunities and set up for success; marketing and sales roles, goals, KPIs and incentives will need to be defined and embedded.

BEST PRACTICE TIPS



ADDRESS 'NOISE' IN THE SALES OPERATING MODEL

Role and goal diffusion is common in sales teams, with salespeople struggling to balance selling time with other responsibilities such as completing administration tasks and attending internal forums.

With new transformation initiatives being introduced, there is a high risk of 'organisational noise' – the distraction and commotion created by change initiatives - further contributing to a reduction in selling time. Whilst transformation initiatives are pivotal to preparing the business for the future, the turbulence they create in the short to medium term may unintentionally restrict, rather than enable salespeople. To help minimise this ensure there is complete clarity on responsibilities across sales roles and clear demarcation between sales and service roles to minimise role diffusion.



EVOLVE SALES KPIs AND INCENTIVES

The levers that dictate success in sales are changing. With a more informed buyer, the quantity-driven or 'numbers-game' approach of the past is no longer the success driver it once was. Whilst activity levels are still important, organisations need to shift towards a focus on sales quality – ensuring that behaviours such as prompt lead follow-up, adequate call preparation and the delivery of contextual insights are business-as-usual.

In addition to reviewing KPIs, be sure to consider whether legacy incentive schemes need to be evolved to ensure the right customer-centric behaviours will be cemented.



POSITION MARKETING FOR A NEW ERA OF ACCOUNTABILITY

Due to so much more of the 'conversation' with buyers occurring across online channels prior to sales involvement, the role and remit of marketing has changed and expanded significantly.

Centralisation of lead generation within marketing is common, with traditional roles changing rapidly as quality content, the utilisation of data and expertise across digital tools and channels become critical to success. Roles, accountabilities and KPIs must be adjusted to bring about a new level of focus on lead generation outcomes and revenue.

STEP TWO – BUILD NEW CAPABILITIES

In order to drive lead generation across multiple new digital channels and effectively operate new technology, both marketing and sales will need to develop a host of new capabilities. Marketers must develop the capability to sustainably produce a greater quantity and quality of content, which successfully 'cuts through' in a cluttered digital environment. Sales will need to develop greater commercial acumen and deeper industry, function or solution expertise to deliver the level of insight required to engage with today's highly-informed customer.

A common challenge is gaining sales buy-in for new ways of working and more integrated processes. In many sales teams there is significant fear and uncertainty around what a digital future represents. With the profile of marketing rising, investments in digital platforms, as well as emerging tools such as marketing automation being implemented - sales can often feel displaced or threatened. Engage sales around the benefits which digital can bring to their role and wherever possible demonstrate the ongoing incremental benefits of transformation

BEST PRACTICE TIPS



OUTLINE A CLEAR VISION FOR THE 'SALESPERSON OF THE FUTURE'

Tomorrow's salesperson will be more empowered and enabled. Technology will eliminate many low-value admin tasks and offer better insight into what customers are doing and thinking about.

More time will be spent on high-value customer problem solving and, overall, tomorrow's salesperson will be more innovative, effective and productive. 'Preparing the field' for capability development by building this understanding is key to fostering sales buy-in for developing new digital skills.



DEVELOP SALES FOR THE DIGITAL AGE

With buyers more informed than ever, salespeople must add more value, more immediately in each interaction. Deep expertise is required to support salespeople in challenging their customer's thinking. Enhanced commercial acumen is required to support the shift from product conversations to strategic business conversations.

A focus on customer data is also critical to helping salespeople 'keep up' with what their buyer is thinking; targeted development is required to build data interpretation skills and ensure salespeople can leverage the key technology and social platforms required to engage customers.



SKILL UP MARKETING FOR SCALED DEMAND GENERATION

Building the 'always-on' demand generation engine which delivers the right content, in the right channel, at the right time - is a significant challenge, requiring a number of new skill-sets. Strong analytical skills are required to ensure marketing can draw insights from increasing volumes of data, as well as report closely on revenue impact and return-on-investment from marketing activities.

A range of digital channels such as social media, search and display advertising will need to be operated effectively. A higher order of technical skills are also required to operate complex marketing technology platforms. For most businesses this represents a combination of capability development and net-new hires. Aside from a range of specialist skill-sets, strong customer and cross-functional engagement skills, the ability to test new ideas, drive change and stitch it all together will be key.

STEP THREE – ENHANCE CROSS-FUNCTIONAL PLANNING

With the buyer's journey now spanning multiple channels and functions, there is a need to enhance cross-functional planning processes to ensure that the customer is cohesively supported at each stage. This means that organisations need to shift from sales-led account planning and engagement to an approach that is more collaborative. Typically, what needs to be determined is

the role and specific activities of each function against each stage of the buyer's journey. By creating clear funnel progression rules and defining the most effective activities each party needs to carry out at each stage, marketing and sales can collaboratively facilitate the buying journey and minimise any potential 'clunk points'.

BEST PRACTICE TIPS



ENSURE BUYER-CENTRIC FUNNEL STAGES

In many organisations funnel stages are disconnected between sales and marketing, resulting in the integration of planning and processes proving difficult. An integrated funnel, or complimentary funnels which tightly overlap, is an important step in enabling more connected and collaborative activity.

It is also important that new funnel stages reflect a subtle but critical mindset shift; whilst legacy stages are commonly framed around 'what we need to do to the customer', new stages must reflect what our customers are doing at each stage and what interactions and content will meaningfully enable their buying journey.



DEVELOP A CROSS-FUNCTIONAL 'COLLABORATION MODEL'

Functions often operate independently, with limited understanding of what is going on outside of their channel. With more customer-facing channels likely being introduced, there is the risk that this will result in more activity occurring across more disconnected silos, exacerbating the gaps in the customer experience.

Build a 'collaboration model' by taking your new buyer-centric funnel stages and detailing exactly what each function will be responsible for across each stage. Outline accountabilities, key measures of success, handover points and interdependencies, as well as the supporting activities each function will carry out to assist each other.

This improved clarity and understanding will support each channel in integrating their activity around the customer.



INTEGRATE KEY ACCOUNT PLANNING

Account planning is typically siloed within sales, with a single account manager or team having ownership over ongoing development, execution and review.

With account-based marketing initiatives rapidly gaining traction, a more integrated approach is required to ensure key customers are engaged cohesively. Developing more integrated approaches to account planning and review will help marketing and sales align around goals for each account, ensuring complementary engagement activities.

Ideally, store account plans in the CRM or in a location where each account plan can be a living document and easily referred to by each function.

STEP FOUR – DESIGN LEAD HANDOVER & RECYCLING PROCESSES

More buyer activity, across more channels, represents an exponential increase in the 'baton changes' between sales and marketing - a critical 'pinch-point' in the success of marketing and sales integration. To keep up with today's buyer, an integrated handover process is critical to ensure that marketing and sales channels can be responsive

enough to deliver the right content or interaction promptly and effectively when required. Ultimately this will be scaled by your technology tools, however robust process definition will lay the critical foundations which ensure that effective ways of working are hardwired and enabled.

BEST PRACTICE TIPS



DEFINE WHAT A MARKETING-QUALIFIED LEAD IS

In many organisations there is a legacy of poor marketing lead quality, resulting in buy-in for lead follow-up from sales being low.

Taking a collaborative approach to defining the requisite lead quality, then following through on maintaining this quality level, sit at the heart of ensuring that marketing-qualified leads receive the attention they require from sales. Agree on the lead attributes - the necessary firmographic and demographic characteristics, as well as lead behaviours - the appropriate accumulation of customer activity, interest and intent - which will warrant sales involvement.

Having a clear 'accept' or 'reject' step for sales in your handover process will also ensure clear accountability for both marketing lead quality and sales follow-up.



MAP YOUR END-TO-END LEAD LIFECYCLE

Defining the ideal path through the business for a lead under a variety of difference scenarios is a useful exercise in crystallising your handover process requirements.

Consider key factors such as how you will: track marketing channel and campaign sources, route the lead to the appropriate salesperson in the CRM, surface the online activity of a lead for the salesperson, create an alert prompting sales action, enable sales to 'accept' or 'reject' a lead, track sales follow-up time, and enable sales to recycle leads back to marketing as they leave the sales funnel.

The more robust this process definition, the clearer your business requirements and better your results will be when it comes to scaling this via your technology tools.



SET UP SALES TO CONVERT

Once your lead handover process is defined, there are two key objectives to keep in mind - ensuring that follow-up happens, and that it happens in a consistently effective way.

Often standing in the way of a seamless follow-up process is the fact that sales face fundamental capacity and prioritisation challenges. It is therefore essential to put in place either dedicated resourcing, clear operating model demarcation or service level agreements which will create the capacity and accountability for lead follow-up.

STEP FIVE – DEVELOP AN INTEGRATED OPERATING RHYTHM

As you introduce new and more integrated marketing and sales processes, it is unlikely to all be smooth sailing. In particular, critical 'pinch-points' such as lead handovers and sales lead acceptance need to be closely monitored and continually fine-tuned. Implementing a set of integrated marketing and sales dashboards and forums will enable a continual discussion and feedback

loop, as well as facilitating early course-correction for any issues. This ongoing discussion also provides the tactical agility to respond to external shifts and plays a key role in embedding new levels of cross-functional integration and collaboration.

BEST PRACTICE TIPS



ENSURE MEETING 'HYGIENE STANDARDS' ARE ROBUST

Forum standards are a commonly over-looked issue that can make the difference between meetings which waste significant time and resources, and those which strengthen strategy to execution disciplines and energise all concerned towards productive, clear actions.

Ensure that your integrated set of marketing and sales meetings are well-sequenced amongst the myriad of other forums which are likely to exist, and more importantly, ensure that they are run efficiently and effectively.

Establish a set of forum standards to ensure meetings are run consistently, have defined meeting owners, decision rights are clear and that next steps and accountabilities are captured and closed out between meetings.



ESTABLISH INTEGRATED DASHBOARDS AND REPORTS

A set of shared metrics and dashboards across marketing and sales are important to support aligned execution and continual course-correction.

Consider capturing metrics such as the sales acceptance vs rejection rate for marketing-qualified leads, sales lead follow-up time, campaign and content performance, as well as funnel stage time to monitor for bottlenecks. Metrics such as these enable you to understand what is working and what is not.

Particularly in the early stages of marketing and sales integration also ensure you are surfacing data which shows the incremental benefits being realised.

Monitoring and showcasing these results supports the ongoing buy-in around the transformation initiative.



FOCUS ON LEAD ACCEPTANCE BY SALES

The age-old problem of marketing leads not being actioned, or being perceived as poor quality, is a key point to monitor closely.

If marketing-qualified leads are not being accepted and followed up by sales, ensure you ascertain why. This ongoing conversation will surface day-to-day operational challenges, enabling solutions to be developed early before they derail engagement around new ways of working.

STEP SIX – HARDWIRE TECHNOLOGY-ENABLED EXECUTION

With more handovers occurring back and forth between marketing and sales, technology and automation are essential for running and scaling your newly integrated go-to-market engine. One of the key challenges is working out how to get the right data in front of the right staff member, in order to deliver relevance at the right time. There are a wide variety of ways to achieve this, but it's more than likely that customer relationship management (CRM),

marketing automation and content management (CMS) platforms will form the core of your technology stack.

Once these are bedded in, you can really start to gain leverage from the enhanced role and goal clarity, new capabilities, enhanced planning and more integrated processes implemented in steps one to five.

BEST PRACTICE TIPS



SIMPLIFY THE CRM

CRM adoption and usage in many organisations is poor, with data quality and customer insights suffering as a result. Typically these adoption challenges stem from a CRM which is too complex, too difficult to use or a perception that the system is intended for managing salespeople, rather than helping them in their day-to-day roles.

A proven path to solving these challenges is coupling robust change and communications management with a CRM that is simple, enabling and actually helps salespeople sell more.



EMBED NEW WORKFLOWS WITH PROCESS AUTOMATION

With new and more integrated marketing and sales processes well-defined, your technology tools can be utilised to effectively hardwire these new ways of working.

Consider how your technology can: automate simple processes with business rules, such as lead assignment and routing; enhance workflows, such as packaging key data which facilitates effective sales follow-up and utilise alerts to facilitate responsiveness, for example by alerting a salesperson if a decision maker attached to a significant sales opportunities accesses key content. Also ensure you leverage your technology tools to generate reports and dashboards for your key marketing and sales metrics.



CLOSELY MONITOR THE EMPLOYEE EXPERIENCE

Whilst the 'customer experience' can often be the primary objective in mind when implementing new technology tools, a positive 'employee experience' is an equally critical outcome to have in mind.

The roll-out of new technology tools will inevitably result in pain points and disruptions for the frontline. Collecting feedback and addressing these issues early with practical solutions is critical to ensure that belief in the tool and utilisation does not decline.

LEVERAGE PILOTS TO ACCELERATE TRANSFORMATION

When you first get going with marketing and sales integration, it is important that you do not try to bite off more than you can chew. The key to success is to run commercially-focused pilots that can tangibly prove the value to all concerned. When done right, pilots are a powerful tool for driving change initiatives and accelerating marketing and sales integration. By demonstrating the value of transformation initiatives, they can help bring people on board, de-risk funding decisions, test hypotheses and learn in a controlled way, as well as embed new ways of working into business-as-usual.





Pivoting the Business Around the Customer

Drawing on a wide range of transformation projects, this paper details the first of three stages required to successfully leverage digital for growth. It provides best practice steps for building and operationalising a more agile and genuinely customer-centric marketing and sales model.



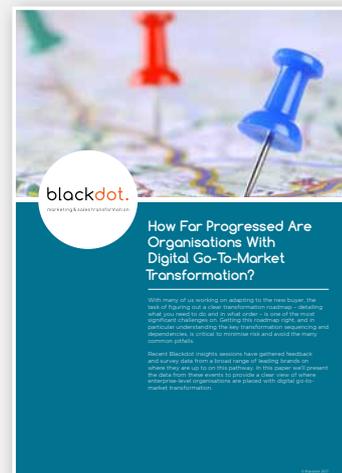
Designing Pilots for Marketing & Sales Integration

Given the scale of the challenges when transforming in the digital age, pilots are a commonly used vehicle for testing, learning and evolving new ways of working. This whitepaper, drawing on numerous pilot engagements, demonstrates an approach to designing pilots that successfully prove the value of marketing and sales integration.



Sales Transformation for the Digital Age

This whitepaper outlines how to evolve sales to deliver results in the 'new' customer environment, and defines the critical role that salespeople will play in this digital future.



How Far Progressed are Organisations with Digital Go-To-Market Transformation?

Blackdot research asked 450 business, marketing and sales leaders how far progressed their organisation was with digital go-to-market transformation. This whitepaper provides in-depth detail on the research and outlines 3 stages that are critical to driving digital maturity.

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