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Aligning Sales and Marketing for CRM Success

Four Keys for Motivating Your Sales
Team to Embrace the System ... and
Create Data-Driven Accountability

By Kerri Martinek

Sales and marketing alignment: leaders talk about it. They say it's what they want. They notice when it's not happening. But they don't always offer a clear explanation of what sales and marketing alignment really *is*.

For most of the teams we talk to, this is a major problem. It's the reason that the goal of harmonious cooperation between these two departments remains elusive for so many organizations. Nobody knows for sure what alignment between sales and marketing looks like. They just have a gut feeling that it *isn't* happening.

Sales/Marketing Alignment: What Is It?

Here's our definition of sales and marketing alignment.

Sales and marketing alignment is a shared understanding and agreement on target markets, ideal customer profiles, messaging, value propositions, and definitions of marketing qualified leads and sales qualified leads. It includes close collaboration and coordination between teams to ensure a seamless buyer experience from lead generation to qualifying to retaining clients, with smooth handoffs between each. True alignment requires shared responsibility to drive business growth, feedback loops, and continuous refinement of strategies to adjust to the market.

That's not where most organizations are. But, as a marketing professional with 25 years of experience in working with sales teams, I know it is where your organization could be.

By aligning sales and marketing efforts, organizations can benefit from increased efficiency, improved lead quality, higher conversion rates, better customer targeting, fewer wasted efforts, and ultimately, increased revenue. And the test of whether sales and marketing are aligned looks like this: **people from both teams choose, based on their personal experience, to use the CRM as a tool for moving revenue opportunities forward.**

If no one needs to be talked into using the CRM, if everyone is using it optimally as a collaborative tool, you're in alignment. If you're a sales leader, and you would bet your paycheck that your team would use the CRM optimally even if you forgot, for some reason, to mention the CRM for a whole month, then sales and marketing are in alignment. If you wouldn't make that bet (and most of the sales leaders we talk to wouldn't), then sales and marketing are not in alignment.

The reason we want sales and marketing to be on the same page – the reason sales and marketing alignment is a good thing – is twofold:

- Being on the same page accelerates growth.
- Being on the same page improves the customer experience.

Those are two sides of the same coin, of course.

If alignment between sales and marketing is not what's happening at your organization, then you're not only missing out on opportunities, but also diminishing the experience you deliver to customers.

Let me share two quick preliminary notes with you before we go any further. First, if your organization is small enough *not* to need a CRM, this article is not for you. And second, you should know that we use HubSpot at Sandler, as do a lot of our clients... but you can rest assured that all the guidance and examples I will be sharing with you here will be easily adaptable to whichever CRM system you and your team use.

The Contract

At Sandler, we're famous for a certain special type of agreement known as an *up-front contract*. This is an agreement that features mutually acceptable commitments from each side of an emerging discussion – commitments that result in agreements on both sides that clarify what the expectations, the deliverables, the accountabilities, and the likely next steps are in that relationship. The up-front contract, invented by our founder David Sandler, is typically used in real-time discussions ... but there's no reason not to adapt the idea to an article. So, here's one I've put together for readers of this piece.

On my side, I'm going to do everything I'm capable of doing in terms of laying out both the challenges of aligning sales and marketing. I'm going to share the best, proven ways to do that. In return, I'm going to ask you to carry out the four simple steps that appear later in this article, and to keep doing them for 90 days.

If we each keep to our commitments, your sales team is going to embrace the CRM, and is going to look for ways to use the system well.

You're not going to have to cajole or penalize anyone, ever again, when it comes to using the CRM, because the members of your team are going to be personally invested in whatever CRM platform it is that you happen to use. Your people are going to be using the CRM optimally and of their own volition; Marketing isn't going to be pestering you about getting people to use the system anymore; and your team's numbers are going to improve.

So: Is that a fair agreement? If your answer is "yes," please keep reading.

From this point forward, I'm going to assume we've got a contract in place.

Let's get started.

The Seven Traits of Sales and Marketing Alignment

It's time to get specific. This is what happens when sales and marketing are aligned:

01. Salespeople **know exactly what needs to happen next and when it needs to happen** whenever they get a lead from marketing. There's no confusion. In most cases, the sales team acts promptly to connect with the person, and uses the right messaging.
02. Salespeople feel a sense of **shared responsibility and shared ownership** with the marketing team when it comes to pursuing and qualifying leads.
03. In addition, salespeople **share feedback directly and appropriately** with the marketing team when they have questions, concerns, or ideas – in a way that supports and strengthens the relationship.

That's the sales perspective. What about from the marketing side? Well, from that team's perspective, when these two groups are in full alignment...

04. The people in marketing know that time is a precious commodity for salespeople – so they don't overburden salespeople with data entry or administrative work that could be done by someone else. They constantly **look for ways to streamline the CRM experience**.
05. What's more, people in marketing have that same feeling of **shared ownership** when it comes to moving opportunities forward. They work constructively with the sales team. There is no sense of "us vs. them."
The two teams are accountable to each other.
06. Whenever they have a question, concern, or idea that relates to the sales team, the people in marketing **share what's on their mind appropriately**, in a way that makes the partnership between these two departments deeper and stronger.

Here's one more important piece of evidence that the sales and marketing teams are in full alignment with each other:

07. These teams **set aside time on their calendar for regularly scheduled department-to-department meetings**. More on this in a moment.

That's seven key traits. Set aside, for the moment, whether you believe any of the above is likely or possible in your world. Just ask yourself: How many of those seven team traits describe what is currently happening in your organization?

Once you know that number, keep reading.

What Sales/Marketing Alignment Doesn't Look Like

Now let's consider what it looks like when these two teams *aren't* in sync.

01. **Salespeople say things like "The leads we get from marketing are garbage."** Sometimes they use even more colorful language.
02. Salespeople say things like, "I just don't have time to do all the stuff they're asking me to do on the CRM." They **resent the time spent populating the CRM and believe the CRM is a micro-managing tool that does not benefit them.**
03. Salespeople **skip steps when using the CRM or populate it at a bare-minimum level**; some may even stop using the CRM entirely, or use it only when importing information about leads they have developed outside the CRM. (This tends to make their pipelines look better than they really are, but that's a separate discussion.)
04. **People in marketing complain** that salespeople are either not using the CRM, or are not using it as it is meant to be used.

05. People in marketing say things like, **“Salespeople don’t follow through on the leads we give them.”** They may point to contact made too late, contact made with an inappropriate message, or contact not made at all.
06. People in marketing say things like, **“Salespeople only work their own leads.”**
07. **Neither team meets regularly with the other.** As a result, communication is sporadic or even dysfunctional. And accountability suffers.

Step aside for a moment from the question of whether any of the things people might be saying about each other are *accurate*. Just ask yourself: **“How many of the seven things I just read are happening right now in my organization?”**

What Was Your Score?

If all seven of the traits of sales/marketing alignment show up in your world on a consistent basis ... if *zero* of the traits of an organization that is out of alignment in terms of sales and marketing collaboration showed up in the simple assessment you just did ... congratulations. Your organization has sales and marketing departments that are fully aligned.

On the other hand, if you regularly experience even *one* of the traits that connect to sales and marketing being out of alignment, you may want to [reach out to us](#).

And by the way, if that’s where you are, you’re not alone. **Many sales leaders and marketing leaders we talk to tell us that the signals in their organization point to these teams being out of alignment.**

If that is your situation, too, the question is: What are you going to do about that?

We have four answers to that question – four keys to sales/marketing alignment that we share with our clients. Each of the four answers is simple – none of them, however, is easy. There is a difference, of course! But these are the steps you will want to take if you are serious about motivating your sales team to embrace the CRM system – and getting on the same page with the people in marketing. Doing these four things may take you out of your comfort zone at first – but the effort is worth it. These four keys really will get your sales team and your marketing team on the same page.

The First Key: Set Time on the Calendar for The Two Teams to Meet on a Regular Basis

The turnaround starts with communication that's consistent and scheduled on the calendar. This doesn't have to be a *lot* of time. But you do want to be on each other's radar screen. And remote meeting tools such as Zoom make it easy for each individual team member to connect names to faces and roles. Use these meetings to create cross-departmental working relationships with people on both teams. Without those relationships, *you will not be on the same page*. It is as simple as that.

For help in facilitating these discussions – the agenda for which will always draw on keys two, three, and four, below – contact us.

GET IN TOUCH



If you recognized *even one* of the symptoms of sales and marketing being unaligned, you have all the motivation you need to avoid justifications like “We’ve never done that before,” or “We’re too busy with X, Y, or Z” or “They wouldn’t agree to that.” Try. Keep trying. Schedule the meeting. **If you keep doing what you’ve always done, sales and marketing will stay unaligned. If you wait until a time when no one is busy, nothing will change.** Take the leap. Show your counterpart in Marketing this article. Set aside some time – even a very modest amount of time – so you can check in with each other on a regular basis. This is where alignment begins.

The Second Key: Agree on What a “Good Lead” Does and Doesn’t Look Like – Ahead of Time

The way to do this is by **co-creating ideal client profiles** (ICPs) for the specific categories of customers you want to work with, and **co-creating personas** that describe the likely title, responsibilities, and pains of the people most likely to impact (or make) a decision to buy. Both teams need to be on the same page about this. Make your wish list *together*, during the same discussion. If the two teams set up and pursue separate wish lists, salespeople will keep concluding that “marketing leads are garbage” and marketing people will keep wondering why salespeople don’t follow the process. Those two problems are *symptoms* pointing to a fundamental miscommunication when it comes to defining a “good lead.” So, you will want to start here.

In a B-to-B setting, when you’re getting clear on the ICP, you’re going to want to discuss things like staff count, annual revenue, and specific industries to target. And in terms of personas, you’re going to talk about things like problems solved for past clients, job titles that connect to responsibility for solving those problems, and the cast of characters likely to be impacted by those problems.

Not long ago, the Sandler Research Center did a global survey on sales and marketing alignment. One of the things that found was that over half of people interviewed said sales and marketing had never collaborated on their ideal client profiles.

Sales and marketing, in other words, were going in totally different directions. Can you see how that's going to lead to problems?

Marketing isn't going to be doing a great job of helping salespeople follow up on leads if they're not targeting the same likely customers the salespeople are!

This conversation is likely to take some time. In fact, it may take multiple meetings for you to get the clarity both teams need in terms of ICPs and personas. And even when you do get that clarity, new ICPs and new personas will emerge. In other words, this is a conversation that doesn't really end. That's okay. It still has to happen ...and it won't happen until someone starts it. So, make sure it starts!

We can help ... by initiating and facilitating this strategically vital conversation between sales and marketing.

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The Third Key: Get Clarity on What's Going to Be Handed off, When It's Going to be Handed Off, and What Needs to Happen When It's Handed Off

Consider the following two scenarios.



Scenario one: Jim makes a reservation to attend one of your company's webinars. The webinar is focused on a topic that is of great interest to your ideal decision maker ... but then Jim doesn't show up for that webinar. Clearly, Jim has shown a certain level of interest and engagement. Let's call that level of interest and engagement 3 (on a scale of 10).



Scenario two: Juanita downloads a white paper on a much less advanced topic. That's a far lower level of interest and engagement. Downloading the white paper doesn't mean Juanita has to set aside time from her busy working day. It doesn't require her to check her schedule or notice when the event is about to start. It doesn't ask her to do anything, really. We don't even know if Juanita read the white paper! Let's give Juanita (assuming we know nothing else about her) a 1 on a scale of 10.

Jim and Juanita require different approaches from both the sales team and the marketing team. And sales and marketing need to discuss, in real time, what those approaches should be, and when they should happen.

Jim is clearly a priority; if there is only time to reach out to one of them, he should be contacted before Juanita. Just as important, the messaging the sales team uses to communicate with someone like Jim needs to be different from the messaging the sales team uses to communicate with someone like Juanita.

If we don't discuss those differences – if we don't clarify, in our cross-departmental discussions, exactly what needs to happen with each type of lead, and when that needs to happen – we're going to miss out on opportunities.

We're also going to damage the working relationship between sales and marketing. Why? Because marketing's job here is to set the sales team up for success. If we don't do that, salespeople will conclude (with justification!) that it's time to find revenue opportunity somewhere else. This is where the complaint that salespeople only work their own leads comes from. It comes from a failure to understand the disconnect that makes that kind of decision from the salesperson possible.

All of those the classic complaints marketing people have about salespeople – that they only work their own leads, that they don't follow through properly, that they don't follow through at all – can be understood as coaching opportunities for the marketing team. **As marketing professionals, it's our responsibility to start and sustain this conversation about what gets handed over, when it gets handed over, and what we think the right next step is once leads have been handed off.**

Because marketing is where the leads are collected, marketing has a vested interest in making sure these issues get raised. And if we haven't gotten buy-in on any of that – if the sales team can't confirm that the people and organizations we're pointing them toward really is who the market is telling them they should be selling to, or how they should be selling to them – then we are going to want to listen carefully to the feedback we get from sales. They, after all, are on the front lines, interacting with prospects and buyers. We're not.

We can't decide unilaterally what needs to happen next to a given lead. And we certainly can't expect salespeople to read our minds on any of this, because what's obvious to us may not be obvious to them. They may have no idea that Jim and Juanita have different behavioral histories.

By the same token, marketing can't expect that there will automatically be a series of expertly executed follow-throughs if marketing is using communication media that salespeople are likely to miss. They've got a lot of things going on in their world. That's their job description: to have a lot of things going on in their world! So, we can't expect a single email or a single memo or even a single discussion to create clarity about messaging and next steps. We want that clarity to happen as the result of a real-time, ongoing conversation. As marketers, we want to make sure that real-time conversation happens on a regular basis, and we want to keep it going over time.

That conversation between sales and marketing must, in turn, enhance the quality of the information salespeople get about specific leads when they use the CRM.

If the quality of that information is consistently high (from the salesperson's perspective), and the source of the information is the CRM, they will use the CRM!

We can help ... by facilitating sales and marketing discussion that clarifies what leads salespeople should get, what happens to those leads, and when it happens.

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The Fourth Key: Set and Defend Up-Front Contracts that Create Data-Driven Accountability on Both Sides

At the beginning of this article, I mentioned that Sandler is famous for the conversational tool known as the up-front contract. Recapping: That's an agreement that features clear future commitments from each side of an emerging discussion, agreements that clarify what the expectations, the deliverables, the accountabilities, and the possible next steps are in that relationship. To simplify this, **just think of the up-front contract as the mutually agreed-upon rules governing any interaction before it begins.**

Salespeople have gotten such remarkable results from using this Sandler tool that it's become commonplace for people to think of it as a "selling tool." But the truth is that it's a communication tool that anyone can use, a remarkably effective tool rooted in a simple concept that is central to human psychology: the **clear future commitment.**

Stop and think for a moment, and you'll see that relationships that work are based on people making, and fulfilling, clear future commitments to each other. This is what builds trust, collaboration, and accountability. And, in a working relationship among peers – which is what all mature, functioning relationships really are, regardless of the job titles of those taking part, peer relationships – each side has both a right and a responsibility to set and defend up-front contracts that create accountability.

That's what each of the meetings between sales and marketing are going to start with: clear, defensible up-front contracts that both sides can understand and agree to. After you start using up-front contracts, you will see for yourself that they deepen accountability, transparency, and trust on both sides.

HERE'S THE POINT: Once the first, second, and third keys have been turned – once the doors of trust and collaboration have opened – the accountabilities between these two teams start getting much clearer and much more detailed. The clear future commitments between marketing and sales began with something as simple as...

“Let’s get together on Thursdays at 1pm for half an hour to make sure we’re all on the same page – and talk about what is and isn’t a good lead.”

That was the first key, remember? Scheduling that meeting. When it concluded, there were commitments on each side. Those commitments shaped the next meeting. And the next. And so on. Now, as **you move past the second and third keys, you’ll notice that the commitments between marketing and sales are focusing more and more on *data*. You’ll hear and sound more and more like this:**

- Marketing commits to target X number of decision makers in Y industry with the title Z who meet A, B, and C criteria. Marketing estimates that this campaign will yield between X and Y total leads for sales over the next fourteen days. If this estimate is off by more than 10%, marketing will let sales know before the next meeting about steps they are taking to make up the difference.
- Marketing commits to share the information sales needs to be able to take action effectively on these leads. Specifically, that includes accurate data about X, Y, and Z. Marketing commits that 100% of the leads it passes along will include this information.

- When a lead that meets A, B, or C criteria gets passed to sales, sales commits to follow up by taking D, E, or F action on that lead within twelve hours. Sales will also keep track of the number of times this commitment is fulfilled.
- When a lead moves forward in the sales process, sales commits to record how many times it moves forward by means of strategy A, how many times by means of strategy B, and how many times by strategy C. When a lead falls out of the sales process, sales commits to record that fact 100% of the time. Marketing commits to use this information accurately and expeditiously to get a clearer picture of what's working and what's not, so the process of identifying decision makers can improve over time.

We can think of these kinds of commitments as service level agreements between the two departments. They're binding. Once they're made, they're non-negotiable ... unless there is a discussion between both departments that changes the agreement – the contract.





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Conclusion

Alignment between sales and marketing is not the result of wishful thinking, of repeating how important it is as an organizational goal. Nor is it the result of a single discussion. It happens because of a commitment to an ongoing conversation that happens in two dimensions: the first is real time, voice-to-voice interactions between the two teams, and the second is the data that is updated regularly, according to agreements, via the CRM.

According to data from HubSpot, organizations that create a close relationship between sales and marketing closed **38% more deals** than organizations that do not, and generate **double the revenue**. If those are the kinds of results you would like your organization to deliver, we can help you motivate your sales team to embrace the CRM system – and create accountability in both directions for sales and marketing. [Contact us](#) to learn more.