



**I love you. You're perfect.  
Now change!**

***A Sales and Marketing love story.***

Presented by:

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# Our fairy tale romance

Once upon a time, the sales and marketing teams of Company X fell madly in love, working happily hand-in-hand, growing revenues by leaps and bounds, consistently over-achieving their goals and being admired by all. Sound like a modern day fairy tale, too good to be true?? We thought so too...and then THIS happened. Come along on our journey to learn:

- ❖ The one thing we did to change how our marketing team executes
- ❖ 5 questions to ask your sales and marketing teams to assess whether you're on the road to a fairy tale romance or doomed to singleton-ville
- ❖ Common pitfalls to avoid when inheriting a legacy
- ❖ How to best handle relationship issues without having to "break up"
- ❖ How our fairytale ended (hint: it hasn't!)
- ❖ Actionable ideas you can execute on your own journey to the perfect sales and marketing relationship

# Introducing the protagonists



**Amanda Joyner**  
Vice President of Global  
Marketing



**Carlie Pratt**  
Marketing Manager



**Mike DeMaio**  
Director of Strategic  
Accounts

# How our love story began: the blame game

Who hasn't been in a relationship or known someone in a relationship, where everything would be great as long as one partner would just change, well, everything?! If only the relationship between sales and marketing was that easy!

*Instead, it's the blame game:*

MARKETING NEEDS TO SEND  
THE SALES TEAM MORE AND  
BETTER LEADS

SALES NEEDS TO FOLLOW  
UP WITH LEADS MORE  
QUICKLY AND HOLD MORE  
APPOINTMENTS

*Raise your hand if you can relate*



# To sell or to market, that is the question?

## Companies with strong sales and marketing alignment:

- ❖ Have a **20% annual growth rate** while those with poor alignment have a **10% revenue decline**
- ❖ Make you **67% better at closing deals, 108% better at lead acceptance, and generates 209% more revenue**
- ❖ Achieve an average of **32% annual revenue growth** while less aligned companies report an average 7% decline in revenue Achieve **24% faster growth** and **27% faster profit growth** over a three-year period

## And:

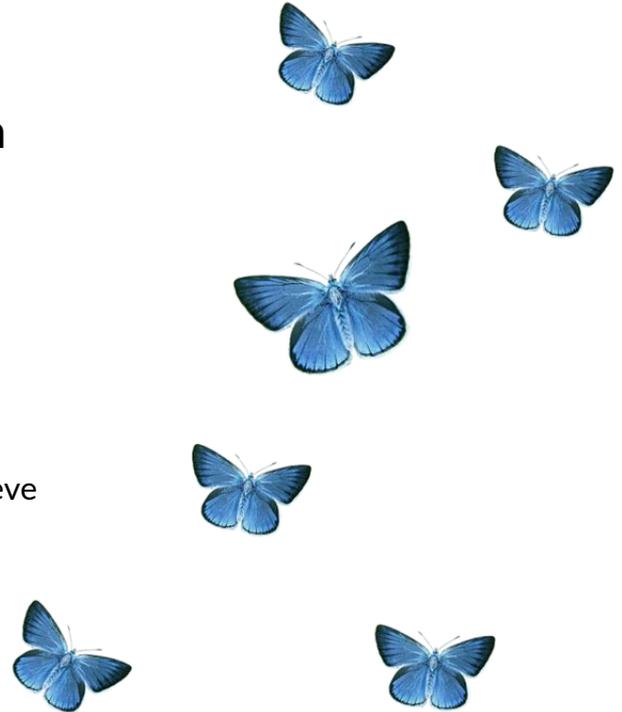
- ❖ **65%** of aligned teams see **increased ROI** from inbound marketing efforts vs. just **35%** in organizations with no SLAs
- ❖ **70%** of organizations that **grow their sales team** as the result of tightly aligned strategies with their marketing team, have **36% higher customer retention** rates and achieved **38% higher sales win rates**

# From “Frenemies” to “Smarketing”



# It wasn't always rainbows and butterflies...

- ❖ Culture of distrust
- ❖ No agreement on goals
- ❖ Operating in silos
- ❖ No cooperation, collaboration or communication
  
- ❖ Marketing focused on quantity of leads not *quality*
- ❖ Marketing had no transparency into how the sales team was performing
- ❖ Content was created without input from sales
- ❖ Sales had few insights into what content a prospect interacted with
- ❖ Sales didn't follow up quickly on leads from marketing as they didn't believe they would be qualified
- ❖ Sales wasn't tracking all their contacts and activity in the CRM
- ❖ Marketing campaigns went out without CTAs to drive conversions



# We got a divorce



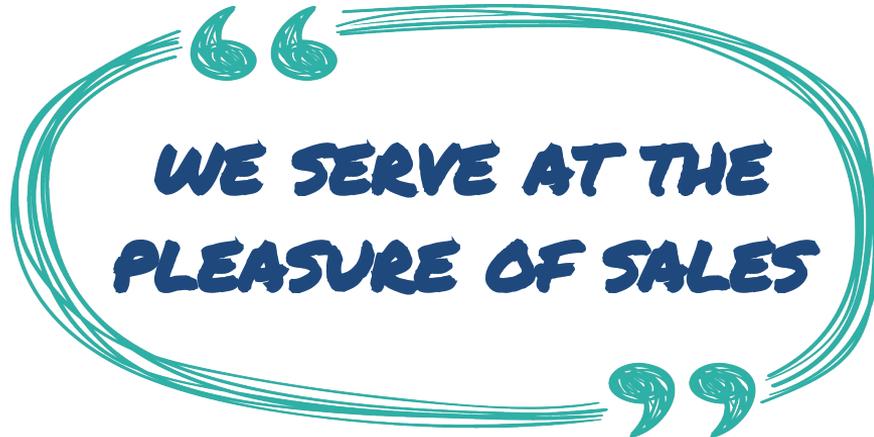
- ❖ Uncontested--neither marketing nor sales were happy
- ❖ We'd outgrown the need for marketing support; we needed revenue support
- ❖ We started over with a marketing team who were already revenue-minded, our sales team!

# But we didn't stay single for long

Sales finally found a true partner. Someone they can rely on, someone who's there for them, someone who listens to their needs and shares similar interests.

We began working from a place of agreement:  
*focus on the customer first*

And this became our mantra...



**We're REVENUE marketers!**

# We still had baggage

*Carrying around issues from our past can cause problems moving forward.*

- ❖ Fear of change
- ❖ Being too hurt to care
- ❖ Afraid to trust
- ❖ Easier to do everything yourself
- ❖ Perception is reality
- ❖ Assuming doing nothing is easier



# Beginning couples therapy: what not to do

- ❖ **Believing any system is set up correctly, even those that seemingly work well**
- ❖ **Assuming there's a strategy behind what was being done**
- ❖ **Using existing reporting / data to make business inferences**
- ❖ **Continuing to utilize terminology, definitions, reporting and processes**
- ❖ **Anticipating that personas and buy cycles are clearly (& recently) defined**
- ❖ **Trying to “fix” everything at once**
- ❖ **Above all, assuming all the “mistakes” left with the people who left the company**

# Lessons learned: how to move your relationship forward

- ❖ **Take the mentality of “starting over”**
- ❖ **Be intentional**
  - Consider adding a fresh perspective
  - Find allies
  - Identify your non-negotiable values & make sure everyone aligns with them
  - Have 1-2 quick “gut check” questions to ask yourself

# The lessons continue

- ❖ **Be easy to do business with**
  - Spend time on what matters most, what you need more of
  - Meet regularly but only when you have a goal/value to add
  - Over communicate & have multiple ways to receive feedback
- ❖ **Don't go to bed mad: admit mistakes, fail fast, have a plan B**
  - Only share problems if you have suggested solutions
  - Don't automatically object to complaints
- ❖ **Laugh at yourself, often**

# *Top 5 questions to determine if your Sales and Marketing relationship is strong*



# 1. Do Sales and Marketing have regular ‘date nights’?

**Date nights offer the opportunity to discuss topics of mutual importance and can be helpful in sustaining the fires of love over the long haul.**

**Best Practice:** meet regularly (i.e. once per month or quarter) to review sales goals, discuss target accounts and how marketing can best support sales efforts.

## **Great ways to make it happen:**

1. join sales ride alongs (or virtual ride alongs)
2. participate in sales quarterly reviews, sales awards, etc.
3. have sales and marketing sit together or in close proximity
4. have marketing involved in sales rep candidate interviews and vice versa
5. set deliberate times to meet bi-weekly to gather, discuss, plan, celebrate

## 2. Is Marketing involved in the buyer's journey?

**The most important part of any relationship is the journey. From the initial attraction to attachment to profound love.**

**Best Practice:** Know your key customers...by name and by face. Meet them at industry events, have a marketing “peer” at the company that you engage with regularly outside of sales calls and whether they're in a buy cycle or not. For prospective customers, ensure you add value through sharing thought leadership and other relevant content customized to their industry/persona/needs.

**Great ways to make it happen:**

1. Ensure your marketing team is well versed in your product offering including your ICP.
2. Spend time with your best customers developing case studies and testimonials, learning their must haves vs nice to haves and discuss this feedback with sales; consider implementing a Net Promoter Score if appropriate.
3. Survey customers and former customers to obtain their candid feedback.
4. Work with sales on your Target Account List and have consistent, intentional AQL discussions.
5. Lead or co-lead a BDR/SDR team to stay close to those visiting your site, engaging with your content & iterating on the best ways to pre-qualify and grow your inbound lead channel.

### 3. In every Marketing meeting, is Sales discussed first?

**Knowing about each other's thoughts, past experiences, current struggles, and future desires helps create emotional closeness in a relationship. Does Marketing know Sales' progress, Sales support, Sales goals, and Sales' needs? Does Marketing know their impact on those goals?**

**Best Practice:** Include Sales progress-to-goal updates within your marketing dashboard including “closed won” and “closed lost” alerts so your team has real time, visual indicators of how the team is performing.

**Great ways to make it happen:**

1. Start every marketing meeting with an update on sales progress-to-goal.
2. Include a sales feature in your marketing newsletter that highlights the top sales rep, a hero deal or ways a rep broke into an account and how marketing supported them.
3. Host a “master class” with an ICP (whether client or prospect) on site for sales to “pick their brain” while marketing moderates the discussion.
4. In your marketing dashboard, include BDR/SDR progress on KPIs like appointments set. Extra points if the Sales Dashboard includes Marketing KPI updates as well.

## 4. Do Sales and Marketing define processes terminology, success in the same way?

Even if Marketing and Sales get along well, have a great connection, and genuinely care about each other, it can be difficult to maintain a healthy long lasting relationship if you're not on the same page or share the same goals.

**Best Practice:** Start with the end in mind...know the sales goal and review the sales strategy THEN develop the marketing tactics to best support those goals. Ensure you're in lock step w/ sales leadership on how they define a "win".

### Great ways to make it happen:

1. Have SLAs for both marketing and sales to create transparency and efficiencies.
2. Utilize your CRM as your "source of truth" across both marketing and sales; this includes creating and tracking all leads within the CRM, putting all account/client/prospect "news" and other updates like competitor intel directly into your CRM.
3. Suggest content within your CRM or a central repository so it's easy for reps to have the most current and accurate data and collateral.
4. Develop a sales and marketing playbook so both teams are aware of how the teams work together to grow revenue, outline the processes and definitions that ensure you're on the same page.

## 5. Does Marketing know key components of the sales process for the team(s) they support?

It's important that each partner is aware of what goes on in each others' lives as well as any changes over time and day-to-day stresses.

**Best Practice:** Marketing should regularly (monthly/quarterly annually) track sales success metrics including sales cycle length, average deal size, penetration of target account list, competitor landscape (& who you potentially lose deals to), who the buyers are and how they like to buy as well as product set purchased, best margin products, and similar.

### **Great ways to make it happen:**

1. Establish and report on marketing KPIs benchmarked against sales success ratios. For ex, look at the average deal size for a marketing net new lead to compared to a sales-sourced net new lead; do the same with the sales cycle.
2. Work with sales leadership to ascertain in what stage of the sales process they need help and build content to directly address that area.
3. Host a “call blitz” for sales reps in follow up to an email campaign to encourage quick wins and reward them for their successes like most appointments set, best call to contact ratio and contact to appointment ratio.

*Remember...  
Sales and Marketing alignment is about one  
shared goal:*

**customers first**

*And what happens as a result?  
Revenue delivered or over-delivered  
every quarter!*



# We're on our way to happily ever after...

***The best love stories last a lifetime! Here's what our sales and marketing "marriage" enabled us to accomplish in just 7 months:***

*ex. 1: Improved open and click thru rates by 23.45%*

*ex. 2: More prospect engagement -- online chats increased from 0 to 114 chats and \$142,100, in new business revenue*

*ex. 3: Increased time on website by a full minute*

*ex. 4: Net new marketing generated leads resulted in \$597,445 close won to date (& counting!)*

*ex. 5: improved trust, collaboration and growth...not just for us but for our customers!*

***Stay tuned for even bigger and better things to come!***

# *Stay with us on this journey to see what challenges & opportunities you can capitalize on!*

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