



How marketing can support sales

One thing which is sometimes missing in businesses is clarity around how marketing and sales people can work together to support each other.

What are the best ways for these two teams to collaborate to make the most of the resources available?

Taking a sales pipeline process as a starting point, it's probably easiest to look at each of the stages in turn to see examples of how marketing can support the client's buying journey.

Pre-awareness: defined prospects not yet marketed to

- Research and come up with a list of possible companies, and relevant contacts, that fit the profile of the 'ideal clients'
- More in-depth research on those companies and individuals where an approach might be made, including recent news
- Data put on CRM system with sufficient detail that links the companies and individuals to the sales process
- Find out if anyone in your firm already has a connection with those companies or individuals

Awareness and Interest: marketing to defined prospects

- Develop a marketing and sales plan for these defined prospects – what activities will help to build awareness and interest in your firm? e.g. knowing who downloads any guides you have on your website or makes an enquiry so that they can be promptly followed-up; creating a research-based report; inviting relevant prospects (as well as clients) to seminars



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These examples show the power of working hand-in-hand.



- Create articles, blogs, tweets around key topics identified and sharing them in places you know your prospects hang out.
- Use materials on these topics to post in relevant Linked In groups with strong headlines and use of images
- Help to place articles in prospects' trade press
- Put together some dynamite collateral for an ideas campaign to help gain meetings with prospects (Note: fee-earners or technical experts need to help here with identifying good subject areas and providing content)
- Identify, with help from others, suitable topic for seminar and set up, manage and ensure follow-up
- Put together speaker presentations and coordinate material that can be used for follow-up and suggest most relevant ways of doing so.

Evaluation and Trial: in dialogue with prospects

- Create a strong set of sales tools, for when they will be needed (proposal templates, PPT templates, case studies)
- Reminders to send touchpoints to maintain contact during what can be weeks, months or even years before they become a client and suggestions for what those touchpoints might be.
- Production and input into proposal documents and pitch presentations to give polished and consistent brand, ensure quality content, consistent tone and clear messaging
- Set up and run seminars, roundtable events

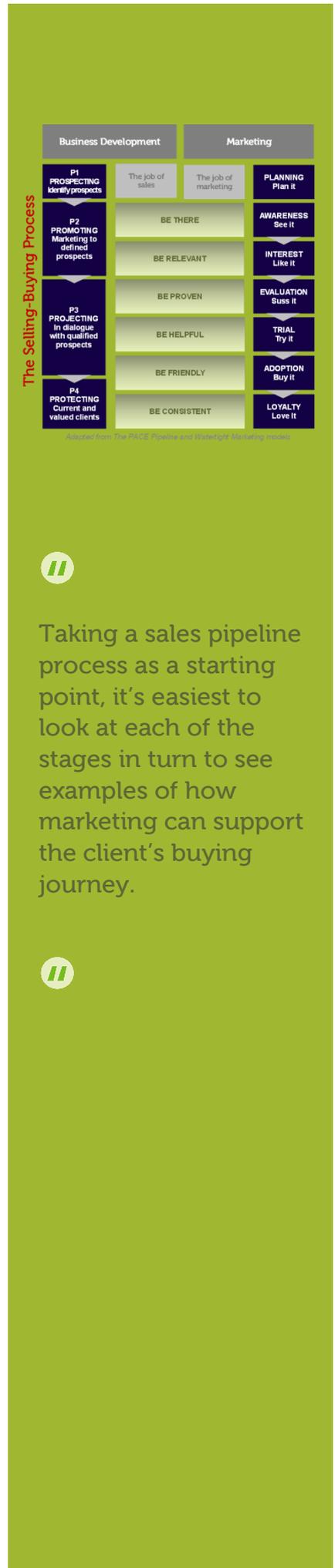
Adoption and Loyalty: prospects buy and become valued and key clients

- Make sure that new clients are welcomed and introduced to the team who will work with them to reassure them they have made the right decision
- Help put together plans for key clients and facilitate regular client team meetings
- Set up and run the client review and feedback process
- Look at 'moments of truth' where clients and prospects come into contact with the firm and identify any points that could be improved
- Client contact organised throughout the year – hospitality, invited to relevant seminars or events, send relevant articles and touchpoints
- Input information about client reviews on the database

These examples show the impact and power of marketing and business development or sales teams working hand-in-hand. There is only one client journey, so if the sales and marketing teams operate in silos the business is at a big disadvantage.

For sales and marketing to work effectively together, three things need to happen:

1. **An agreed business plan** – and preferably a jointly owned sales and marketing plan, where the intent, right from the outset, is to achieve the business objectives together, as a combined team, looking to each other for the support needed to get there. It may also be that how you incentivise and report on marketing and sales



needs to change. Sales people often look to the next few months because of how they're incentivised; marketing teams have a longer view in mind not least because some purchases can take months or even years to come to fruition.

2. **A full and common view of the customer's buying journey** – mapping this out as a whole team, including sales and marketing people, will lead to an agreed plan and understanding of what is needed from sales, marketing and each other to motivate the client along that journey to purchase. By doing this, you can also agree what the customer is thinking at each stage and where you might find them as well as the criteria they use to make decisions. This will inform the marketing and sales plan and the approaches which will be best in tune with how the customer is thinking.
3. **Good communication and information sharing** – both teams need to work collaboratively to understand what's going on in each other's world and to deliver a great service to each other. And this needs to happen on a regular basis; a one-off meeting just isn't enough.

Part of the problem is often a mis-understanding about what each other's jobs involve: what is the job of marketing in the business and what can it help the business achieve; and what is the job of sales and how can the team be structured and incentivised to have a long-term view not a short-term sales target?

Too often, businesses focus on sales to the detriment of marketing, not realising the strategic and tangible value a good marketing plan has in helping to deliver those sales results, in getting prospects motivated to buy and in making sure customers remain loyal.



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1. An agreed business plan
2. A common view of the customer's buying journey
3. Good communication

