

Beyond Alignment – Marketing & Sales Collaborating Through Content Automation



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The conversation about investment marketing and sales alignment began over a decade ago. After ten years, less than 50% of organizations surveyed said they aligned appropriately to achieve the financial results for which they are accountable.

The resistance persists because achieving the synergies between marketing and sales is not viewed as transformational. It does not get the top-down executive support it requires. Nor does it get the governance structure that major transformation initiatives require to succeed.

There was a point in time when alignment between the two organizations made perfect sense. In today's digital world where buyers prefer digital self-service (Figure 1) and remote human engagement, it is no longer the right way to think about the relationship between marketing and sales.



	Aware	Discover	Evaluate	Purchase
Historically	Marketing	Sales	Sales	Sales
Circa 2000	Marketing	Marketing	Sales	Sales
More recently	Marketing	Marketing	Sales	Sales
More recently		Self-Service		
Future	Marketing	Marketing & Sales		Sales
Future		Self-Service		

Figure 1

Alignment is necessary but not sufficient for a buyer’s journey that is no longer linear. Nor is alignment alone appropriate given the technology that exists today to drive workflow and collaboration between marketing and sales.

Collaboration, along with alignment, is the key to a successful partnership between marketing and sales. Collaboration goes beyond the funnel to a working partnership that starts with planning and ends with measuring performance. The closer the collaboration between the functions, the faster the business will grow.

#BeyondAlignment is the next generation of interaction that occurs between marketing and sales in a digital self-service world shaped by buyers’ preferences.

But before we can begin to talk about the interaction between marketing and sales, we need to talk about each organization’s fundamental roles:

- Marketing creates brand awareness and generates interest for products and services.
- Sales closes opportunities that result from marketing’s efforts.

These are mutually exclusive. However, the goals the two teams have in common provide a broader basis for this discussion. The two teams:

- Are incented for profitable growth through acquisition and retention
- Reinforce and protect the brand
- Have the opportunity to build long term lasting relationships with customers



- Both receive customer feedback to contribute to a real-time feedback loop
- Both will nurture the customer towards a closed transaction.

Continuing to work in silos and handing off a Marketing Qualified Lead has not been effective and will continue to be ineffective.

THE (R)Evolution

Until now, words like

- Communication
- Trust
- Mutual respect
- Teamwork
- Common vocabulary (a more recent addition)

have been used to describe the ideal relationship between marketing and sales.

These attributes are necessary but not sufficient to get us closer to a more powerful model.

The foundation for these collaborative processes should include:

- Buyers' preferences
- Executive sponsorship
- A closed-loop feedback and communication environment
- A culture of inclusion
- A common vocabulary
- Common or tightly integrated marketing and sales technical platforms
- A shared data environment that is the single source of truth of customers
- Plus all of the attributes we aspired to in the alignment model
 - Trust
 - Mutual respect
 - Teamwork

Collaboration breeds efficiency, more effective distribution of work and higher-quality decisions and outputs. Collaboration is an indication of a healthy work environment where trust and inclusion are inherent cultural norms. Therein lies the transformational aspect of #BeyondAlignment.

ALIGNMENT VS. COLLABORATION



Alignment is an “arrangement in a straight line or incorrect or appropriate relative positions”. The very term connotes rigidity. Progress is regimented and predictable. The flow contains a “handoff” from marketing to sales at a predetermined event (i.e. a lead score reaches a certain threshold).

Alignment alone doesn’t work because the buying cycle is no longer a serial and predictable path. The structured cycle is outdated thinking in a networked world of synergistic thinking and style of working. Alignment has limitations thereby breeding inefficiency and costs including the cost of lost sales. Alignment is inefficient because it can’t keep up with real-time information. It leaves businesses falling short of their sales targets. My experience with organizations is that a high degree of informality exists in their approach to alignment including a siloed way of thinking and working.

Now consider Collaboration. “To work with another person or group to achieve or do something” i.e. profitable growth. “Work with” implies simultaneously performing an activity (not people doing the same thing). Collaboration driven by buyer preferences represents today’s modus operandi.

GETTING FROM ALIGNMENT TO COLLABORATION IN CONTENT AUTOMATION

Most organizations take an informal approach to alignment. They do not have governance or a framework to get to alignment and therefore it is a catch as catch can idea. Getting to true collaboration will require more rigor and structure.

There are major processes in marketing and sales that are ripe for collaboration. From annual (quarterly, monthly) planning to manage metrics that matter.

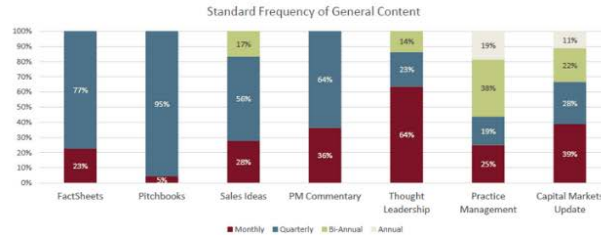
Content is a great place to begin a more collaborative approach to marketing and sales working together.

A recent survey on [Content Marketing Automation](#) by [Synthesis](#) and [Fuse Research](#) provides tremendous insight into the increasing demands on the quantity of content required to market funds and the distribution and usage tracking of that content.

In addition to Fact Sheets, Pitchbooks, Sales Ideas and PM Commentaries, joint planning about new content and its objectives could be determined. Improvements to existing content and the tools to produce it more efficiently through [content automation](#) could be identified.

The Synthesis/Fuse Survey identified that 75% of investment marketers are not satisfied with the data that fuels their content marketing process. A joint initiative (and to include the Analytics and IT teams) could be to identify short and long-term improvements to data collection and management.

Investment Content Automation Benchmarking Report



[Download](#)

Overlaying some governance and structure using tried and true techniques will make the collaboration an intrinsic part of marketing and sales execution. Examples of these techniques are:

- facilitations
- written plans and checkpoints
- the use of a RACI (Responsible, Accountable, Consult, Inform) matrix
- regularly scheduled updates or perhaps a morning standup meeting to introduce a more agile approach to marketing and selling in concert.

BENEFITS OF COLLABORATION OVER ALIGNMENT

Premium research cites the following benefits of marketing and sales organizations work together effectively:

- The tighter the working relationship 36% higher retention and 38% higher sales win rates
- More adaptable sales and marketing processes have 10% more of the salespeople on quota
- The tighter the working relationship 24% fast growth and 27% faster profit growth over 3 years

LOOKING AHEAD

Marketers will always be branding, generating awareness and nurturing interest.

Sales will always be closing.



The middle of the funnel has evolved into a self-service model reinforced by data-driven engagement from marketing and sales.

YOUR CALL TO ACTION

1. Establish how well marketing and sales collaborate today.
2. Determine if/how #BeyondAlignment should be reshaped based on the size of your company, complexity of its business and culture of your organization.
3. Engage the executive sponsorship to make the initiative successful. Consider this a transformation initiative.
4. Select a process or subprocess e.g. Content Automation that can be used as a pilot. This process is one where there is a high probability of success and is not too controversial

Marketing and Sales: Just the Same, Only Different!