


# **DRIVING INTELLIGENT CUSTOMER EXPERIENCES**

How to be timely, useful, and relevant  
by aligning sales & marketing



Sales and marketing alignment isn't just a buzzword. It's a way to enable seamless, indispensable communication between you and your customers. And, according to research from Join the Dots and LinkedIn, it's here to stay.

B2B organizations that have aligned sales and marketing functions not only see better business results, but can captivate audiences with elevated buying experiences reinforced by shared data.

And the reason that sales and marketing are collaborating is clear: It pays off in important ways. It boosts financial performance and can improve internal culture.

First let's take a look at why alignment is critical and how sales and marketing teams are progressing toward shared objectives. Then we'll share some simple steps that can help you get your sales and marketing teams working together in lockstep on LinkedIn. And throughout, we'll leverage the opinions and success stories of business leaders who are embarking on this journey.

## **TIMELY**

Reaching out at the right times with experiences that make sense.

## **USEFUL**

Serving content that answers important questions and buyer pain points.

## **RELEVANT**

Personalizing communications to buyers based on the context of their business.

## KEY FINDINGS

### SALES AND MARKETING COLLABORATION IS GETTING BETTER AND HAVING A STRONG IMPACT ON THE CUSTOMER BUYING EXPERIENCE WHILE ALSO DELIVERING BUSINESS OUTCOMES.

LinkedIn's and Join the Dots research, which surveyed 3,516 sales professionals and 3,627 marketers from Australia, India, Southeast Asia, the United Kingdom and the United States, revealed three main conclusions.

#### Alignment is critical

End-Customers are looking for Sales and Marketing alignment and it is critical for the bottom line, with 58% of salespeople and marketers saying collaboration delivers improved customer retention and another 54% saying it boosts financial performance.

58%

delivers improved customer retention

54%

boosts financial performance

#### A culture of collaboration

Marketing departments and sales teams are more closely aligned than you might think, with 8 out of 10 (79%) respondents agreeing that there is a culture of collaboration between sales and marketing at their company.

79%

agree that collaboration exists between sales and marketing

#### Shared objectives and measurement improves collaboration

Sales and marketing teams should start with clear objectives and success metrics. Over half (52%) of sales and marketing professionals cited that shared objectives and KPIs help the business improve collaboration.

52%

believe shared objectives and KPIs improve collaboration

# ALIGNMENT HAS A DIRECT IMPACT ON CUSTOMERS AND BUSINESS

## FOR THIS STUDY, WE DEFINED SALES AND MARKETING ALIGNMENT BROADLY.

So, we've determined that many sales and marketing teams are prioritizing alignment. But why? Simply put, it's good for business, and your customers will love it too.

Alignment between sales and marketing included developing strategy together, sharing goals (up to and including revenue), agreeing on lead definitions and the hand-off of prospects between marketing and sales, and aligning on measurement and even compensation.

Our research found that customers are the main winners when sales and marketing work together. Seventy percent of respondents said sales and marketing collaboration delivers a better customer buying experience.

But it's not just the customer that benefits; vendors do, too.

The key business benefits of increased collaboration are:

58%

**customer retention**

58%

**improved efficiency**

54%

**financial performance**

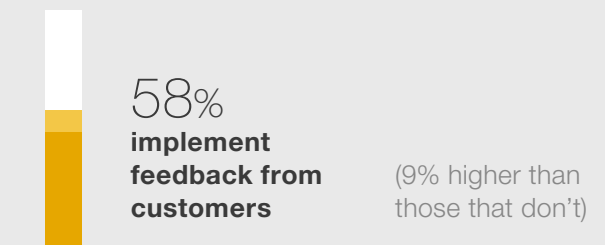
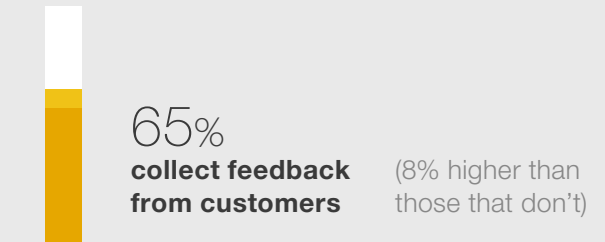
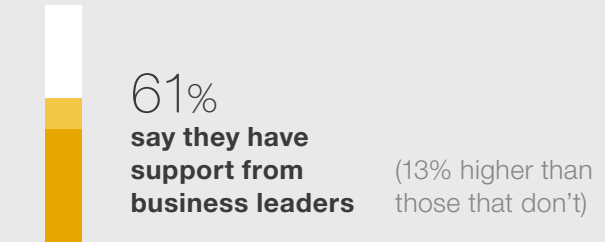
52%

**enhanced productivity**

It's instructive to consider what the respondents mean by financial performance. Primarily, they are referring to top-line revenue growth and bottom-line increases in profits. Overall, increased alignment between sales and marketing appears to result in more qualified leads, which deliver top-line growth. Alignment also can deliver greater customer retention, which has a strong positive contribution to profits.

# HOW SALES AND MARKETING TEAMS THAT COLLABORATE DIFFER FROM THOSE THAT DON'T

Sales and marketing teams that collaborate stand out from those that don't in some clear ways.



# THE STATE OF SALES AND MARKETING ALIGNMENT

The data shows that alignment is the right way to go to market for many companies. But how are these companies doing with bringing these two functions closer together?

LinkedIn research showed salespeople and marketers had extremely similar viewpoints on the state of alignment and collaboration, however the sales team are slightly more positive about how the teams collaborate together.

Of salespeople, 79 percent said they agreed or strongly agreed there is a culture of collaboration at their company. Similarly, 78 percent of marketers felt the same way.

LinkedIn research showed significant alignment between Sales and Marketing with **79 percent** of respondents agreeing or strongly agreeing that there is a culture of collaboration between Sales and Marketing at their company.

However, only **21 percent** said they “strongly” agreed, so there’s room for improvement.

■ Marketing team ■ Sales team



Sales and Marketing align to the same strategy and objectives



Sales and Marketing have a shared understanding of the customer journey



Sales and Marketing collaboration is a top priority within your company



The workflow processes between sales and marketing are good and there is clear accountability



Sales and Marketing act as one cohesive team



The company has a well-defined process for collaboration between Sales and Marketing



Sales and Marketing work together at all stages of the customer journey

# COLLABORATION IS IMPROVING, BUT IT COULD BE BETTER

Businesses who said they had improved sales and marketing collaboration attributed the gains to three key factors:

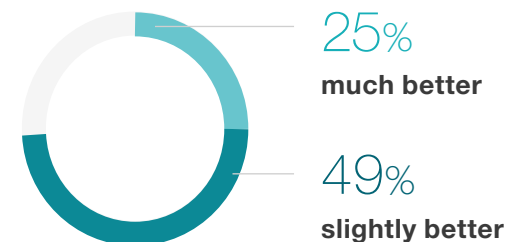
- 57% frequently meeting to share ideas and information
- 53% coordinated planning and outreach
- 52% agreeing on shared objectives and measurement

## Teams that collaborate well see a host of benefits

Overall, our research indicates that sales and marketing teams that collaborated well together shared these five characteristics:

- |     |   |     |  |
|-----|---|-----|--|
| 82% | leadership actively encourages collaboration        | 74% | share market and customer information freely |
| 80% | aligned to the same strategy and objectives         | 71% | effectively address customer needs           |
| 76% | have a shared understanding of the customer journey |     |  |

Businesses are optimistic about the state of collaboration between their sales and marketing teams. Almost three-quarters of respondents (74%) said their companies have improved their sales-marketing collaboration in the past year.



## GILES HOUSE

**Chief Marketing  
Officer,  
CallidusCloud**

### **LI: How did you identify the disconnections between sales and marketing?**

**GH:** By looking at our data, we could see a lot of leads being passed over. They were stalled, and we found that there was a bit of a disconnect between sales and marketing. Also, we discovered that the sales team wasn't always following the procedure to move the leads forward. We were scratching our heads, wondering if [our processes were] working, because we didn't see it getting very far down the pipeline. There was definitely a breakdown, and we needed to remedy it, along with aligning on expectations, rules of engagement and a redefined process.

Other than examining data, salespeople are good at giving feedback. Ours gave us feedback on what the definition of a lead was so that we could keep iterating on that. They also let us know what they wanted to take on, and we changed their workload based on what they already had on their plates and their sales capacity. It's a fluid thing, rather than a point-in-time exercise.

### **LI: What role did data play in the identification of the gaps?**

**GH:** With our data, we were looking at the funnel, our marketing automation system and our CRM to identify where activity was occurring. In the end, we got in deep with leads and the creation dates on opportunities. One of the things we found was that sales was recreating and re-entering opportunities instead of traversing through the lead record. It was an educational opportunity, so it helps to dig into data to find things like this.

### **LI: How did realignment impact your sales and marketing strategy?**

**GH:** Strategically, it didn't impact it. Our intent from the beginning was to be well-aligned. It's something you absolutely have to do; it's not an optional, "If I've got time, I'll talk about it with my sales leader, head of marketing or head of demand generation." You can't be successful if sales isn't closing on leads. There can be none of this "marketing first, we'll lead the way to the deal." The deal doesn't happen without sales closing it. Our job in marketing is to find the meat; their job is to kill it, skin it and bring it home to the cave. It's important to make sure they're following up on the leads you've invested in, and it's important that you do your due diligence by checking in with salespeople and leadership at every level. Make sure they're well-fed, or if there's too much on their plate, dial back and qualify prospects harder.

### **LI: How has this realignment helped your company connect marketing to revenue?**

**GH:** Operationally, we're able to attribute a lot more revenue to marketing programs, which is exactly what you need to do when you're battling for budget in the boardroom. It has allowed us to demonstrate a lot more ROI on marketing and personnel, which has allowed us to continue to grow the team, and grow in excess of 30% quarter on quarter.



# ENABLING COLLABORATION

Here are some steps to get your teams working toward alignment.

“We’re going to see where salespeople need to be much more aware and attuned to their respective markets. They’re going to have to go beyond what the marketing operations can provide, and really get into their own unique viewpoints and develop a lot of those marketing skills on an individual basis. I think from a marketing perspective, we’re going to continue to be more mindful of what the sales needs are, particularly as more and more of the sales process is really happening online.”

**David Gadarian**  
Head of Digital and Social Media,  
Dassault Systèmes

## Align on goals

Arrive at a shared understanding and agree on the business objectives both teams want to pursue as a springboard for the next steps.

## Determine the lead process

Create a defined workflow that helps the organization track the steps from the point at which a lead is generated to when the lead is handed off to sales. You can start by defining your sales pipeline stages in your CRM. The textbook approach is similar to this:

**Inquiry → MQL (marketing qualified lead)**  
→ **SAO (sales accepted opportunity)**  
→ **SQO (sales qualified opportunity)**  
→ **Closed/Won deal**

This process may evolve as you try different campaigns and get feedback from sales.

## Develop a qualified lead definition

Determine when a lead is ready to be passed to sales. This should include information such as company size, seniority, industry and behavioral information, such as whether the lead attended an event, requested content or asked for a demo.

## Determine the lead hand-off process

Define which leads will be handed to sales and how sales will follow up on these leads.

## Develop Service Level Agreements (SLAs)

Resolve what the performance metrics will be that marketing and sales must deliver. For example, marketing will agree to deliver a predetermined number of qualified leads, and sales will agree to follow up on qualified leads in a specific time frame.

# IMPROVING THE SALES AND MARKETING RELATIONSHIP

## Sales and Marketing professionals told us...

These are the top actions to get right to ensure collaboration between sales and marketing:

- 52% | **have shared objectives and KPIs**
- 52% | **generate better customer insights and understanding**
- 47% | **ensure clear accountability and workflow**
- 45% | **adhere to a schedule of regular team meetings**

## Revenue is the best way to measure Sales and Marketing alignment

Our research found that sales and marketing collaboration is most likely to be measured through:



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## ASK THE EXPERT

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# JOSH NORMAND

**VP of Strategic Sales,  
Hootsuite**

### LI: What were the biggest challenges in aligning sales and marketing?

**JN:** I think sales and marketing alignment challenges come from a lack of alignment on goals. Everyone has the corporate goal of revenue and customers, but as those goals get translated down through departments (marketing often reports to something different than sales), sometimes things get lost in translation. There's always good intentions; for instance, marketing may have a good lead goal, but sometimes the tactical goals can be in conflict. Other challenges include: quantity of leads over quality of leads, and making sure things are followed up with and tracked in the right way.

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### LI: What did Hootsuite do to achieve success?

**JN:** I think there are a number of things — we over-communicate at multiple levels, not meeting for the sake of meetings, we're very respectful of people's time, there's an agenda, everyone has clear roles and responsibilities. Before we go to an onsite event, there's a ground plan — a plan to optimize the event once

we're there and to change tactics when needed. When discussing goals, we discuss a successful outcome using data analytics; for instance, we know this event generated more revenue this year vs last year, etc. We have specific goals about revenue we want to drive from each event. It's about really strong communication and collaboration, everyone has ownership — it's a marketing event, but sales has a very clear goal. This all comes down to alignment at every level of the organization — everyone is acting like the CEO of that particular event and ensuring a successful outcome. There's no magic to it; it's just people coming together and collaborating.

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### LI: How did using LinkedIn help sales and marketing?

**JN:** If you think about sales and marketing as a part of the same process, it's the same process of customer acquisition, and LinkedIn is essential in every stage of the process; in fact it's changed the selling process. If you think about every stage of the sales and marketing cycle: awareness, outreach, acquisitions and advocacy, social plays a role in that entire continuum. I can't imagine someone doing social selling without incorporating LinkedIn. We're using LinkedIn to create awareness, promote brands, do account research and listen to buying signals. We're using it in the entire process: people like your brand, then recommend it, then we get to use that in the process of reaching out to our next client. We're using it to touch the entire customer lifecycle.

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### LI: What were the results?

**JN:** I don't know how anyone in my role or anyone on my team could possibly achieve their goals without LinkedIn. I can absolutely point to very specific sales opportunities that were the direct result of LinkedIn. We became aware of an opportunity, found the right stakeholder to reach out to — a large portion of the selling cycle occurred on LinkedIn. There's absolute evidence that it's increasing our sales pipeline, increasing revenue. I can't imagine now a sales cycle for at least a decade where LinkedIn didn't play a role in that sales process.

## HOW THE LINKEDIN PLATFORM CAN BOOST THE POWER OF SALES-MARKETING ALIGNMENT

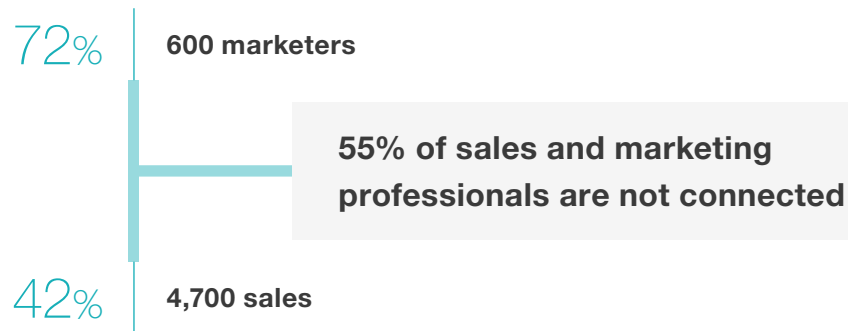
Beyond the global survey of sales and marketing professionals that LinkedIn conducted, data on how sales and marketing teams use the LinkedIn platform itself provides additional insight into the state of sales-marketing alignment.

The data shows that the more aligned sales and marketing teams are, the better their performance on the platform. Moreover, the more that sales and marketing teams are integrated into the platform, the more each team aids the other. Put another way, data shows that using LinkedIn Sponsored Content on the platform makes sales more effective. Additionally, the more connected a sales team is with LinkedIn members, the more effective a company's marketing can be.

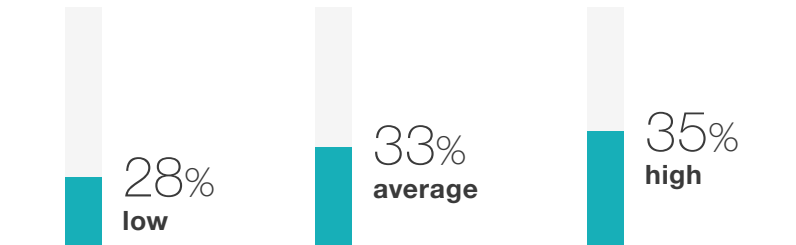
# THE LEVEL OF SALES-MARKETING ALIGNMENT ON LINKEDIN

LinkedIn analysis of organizations\* shows that there is a significant amount of interconnectedness on the LinkedIn platform between sales and marketing professionals.

Interconnectivity on LinkedIn provides a strong indication that sales and marketing professionals have a working relationship. The research showed:



In the top quartile of interconnected sales and marketing teams, **35%** of prospects that sales reps reach out to have already been nurtured by marketing. On the other hand, in the lowest quartile, just **28%** of prospects have been nurtured.



## LinkedIn's research also finds

The more aligned sales and marketing teams are, the more often sales reps are reaching out to prospects that have already been nurtured or "warmed up."

\* The analysed organizations met a certain minimum threshold of usership for both LinkedIn Marketing Solutions and LinkedIn Sales Solutions and have 600 marketers and 4,700 sales reps, on average.

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## ASK THE EXPERT

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### CAROLA VAN DER LINDEN

Global Virtual  
Marketing Manager,  
Cisco

#### LI: How does your marketing team work with sales to develop the right buyer personas?

**CV:** We create buyer personas in Cisco to identify the perfect buyer, the perfect person that we could target with a marketing message based off segments, job descriptions and based on where a person is currently in the buyer journey. We have four definitions of customers that we're targeting. We really emphasize the personalization of marketing, so we also encourage our sales teams to send personalized messages as much as possible. Although the buyer persona may give us very important information about the buyer, like where they are, we also keep in mind where the buyer fits in the process, which is important for the salesperson to know.

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#### LI: What types of data help you define audience segments?

**CV:** We've segmented the audience and defined each type of customer so our salespeople can map prospects against those segments. The data is based on the number of employees that work for that company and where there are industry spenders.


When there are 0-99 employees, we call it a small company; 100-250, a small business; 250-999, it's in-market or commercial, which is the segment I work in. We have a segmented sales organization, meaning we have a sales group that operates in the Cisco office and uses collaboration tools and social platforms to have an ongoing dialogue with their particular customers.

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#### LI: What role do social channels like LinkedIn play?

**CV:** We teach our sales teams, both internally-based teams, as well as those in the field, that the buyer's journey has changed dramatically. Seventy percent of the buyer's journey happens online; picking up the phone or sending an email is rare. If we cold call, it goes to voicemail, and we never receive anything back unless we have an established relationship with that customer. Cisco has Twitter handles for countries and topics like the solutions we sell. We also have LinkedIn and Facebook communities because, in addition to having a corporate social visibility, we also require a sales presence on social media. Twitter and LinkedIn are what our audience uses the most, so it's important for our salespeople to have a presence on those same platforms.

We also have LinkedIn Sales Navigator to support our sales community so they could learn more about customers and do social learning — find out what kind of questions they are posting, what communities they are a part of and what kind of blogs they post. It gives Cisco great insight into the contacts at a company we want to sell to and how that company is broken down. Another advantage of LinkedIn is finding lines of business within LinkedIn Sales Navigator. All of these channels have become the default for how a Cisco sales rep works throughout the day.



# HOW MARKETING ON LINKEDIN CAN BOOST THE EFFECTIVENESS OF THE SALES TEAM

A prospect that has been nurtured by a company's marketing is more likely to respond to that same company's sales reps.

LinkedIn members exposed to a company's marketing on the platform are **25% more likely to respond** to a Sales Navigator InMail from one of that company's salespeople.

Response rate to InMails sent by sales reps

15.8% | control

19.8% | exposed

The more often members are exposed to a company's Sponsored Content on LinkedIn, the more likely they are to respond to an InMail from that company's sales reps.

1.38x  
**more likely to respond to InMail** from a sales team when they are exposed to more than 10 Sponsored Content impressions from that company

Similarly, LinkedIn members who have been nurtured by a company are 10.7% more likely to accept a connection request from that company's LinkedIn Sales Navigator users.

Response rate to InMails sent by sales reps

68.9% | control

77.3% | exposed

The more often members are exposed to a company's Sponsored Content on LinkedIn, the more likely they are to connect with that company's sales reps.

1.12x  
**more likely to connect with a sales rep.** when exposed to more than 10 Sponsored Content impressions from that company

# HOW INCREASING THE LINKEDIN ENGAGEMENT OF THE SALES TEAM BOOSTS MARKETING'S EFFECTIVENESS

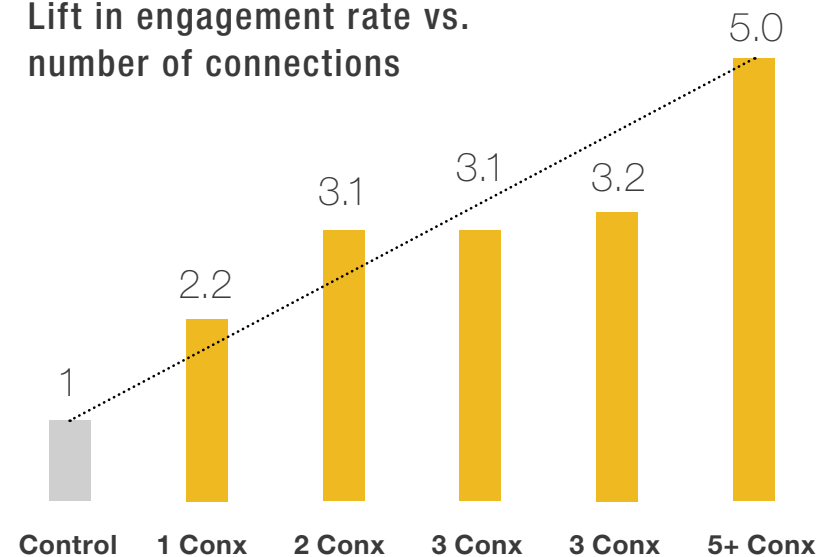
It's clear that marketing can aid the sales team on the LinkedIn platform. Salespeople can also help spread their company's marketing messages on LinkedIn.

Members who are connected to one sales rep in a company are **2.2x more likely to engage** with that company's Sponsored Content on LinkedIn.

Additionally, a sales rep's connections are **4.8x more likely to re-share** the marketing messages of that rep's company on the LinkedIn platform.

Engagement Rate with Sponsored Content	1.5%	control	147% more likely to like and comment on the rep's company's Sponsored Content
	3.7%	exposed	
Re-share rate of Sales reps' connections	0.017%	control	
	0.080%	exposed	

Lift in engagement rate vs. number of connections





# CONCLUSION

Our global research proves that sales and marketing are collaborating more closely than many observers could have imagined. There's room to grow, however, and this alignment between sales and marketing could grow even stronger.

There are many reasons why both sales teams and marketing departments would want their collaboration to increase. Respondents to our survey believe that greater sales-marketing alignment leads to improved customer retention, efficiency, financial performance, and productivity.

The LinkedIn platform is a window to the positive impacts of greater sales and marketing alignment. Research shows that marketing's use of LinkedIn Sponsored Content on the platform makes sales more effective, because prospects nurtured by marketing are more responsive. Additionally, the research indicates that the more connected a sales team is with LinkedIn members, the more effective a company's marketing on the platform can be.

Ensuring better collaboration between sales and marketing is not out of reach at your company. But implementing a collaborative culture does tend to require a commitment to actions, such as implementing shared objectives and understanding of the customer, ensuring clearer workflow, and simply adhering to a schedule of regular team meetings.

## Methodology

Join the Dots, a research company, was commissioned by LinkedIn to conduct an online survey of 7,140 sales and marketing professionals across five key markets including United States, United Kingdom, Australia, India, and South-East Asia. All participants completed the survey between September 26, 2016 to October 19, 2016. They were invited to take the survey via an email invitation. Respondents were incented to participate. All participants were 18 years of age or older and worked in sales or marketing roles.

