

Have you ever felt your sales & marketing teams are struggling to work together? If so, this is relevant content from our webinar series: [What Do B2B Marketers Do Now?](#)

Below is an excerpt from our recent webinar “[Choosing the Right B2B Demand Generation Strategy](#)”. In this short webinar excerpt, our featured guest, Alisa addresses an important topic: [How Do You Match Sales Needs with Marketing Strategy?](#)

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**Rick:** Hello, everyone. Have you ever felt your sales and marketing teams are struggling to work together? I'm Rick Endrulat, President of Virtual Causeway, and we produce the insightful series, *What Do B2B Marketers Do Now?* I know everyone's busy, so today I have a segment from our recent webinar, “Choosing the Right to be Demand Generation Strategy”. Our featured guest in that webinar is Alisa Grocock, VP, Principal Analyst of Demand Generation and ABM at Forrester. In this webinar segment, Alisa is addressing: how do you match sales needs with marketing strategy? This is an important topic because I've seen both the problems that come when there is not an alignment and the incredible benefits that come when there is alignment to fuel success. Let's join Alisa now.

**Alisa:** So I'm going to move into the content of our presentation today and start with this phrase that I think all of us are familiar with. If all you have is a hammer, everything looks like a nail. And that is so true. It was no more true than ever when my son for his fifth birthday got a Bob the Builder kit, and he came home and he kind of wandered around all weekend with his hammer, looking for something to fix in the house. And sometimes in marketing we're accused of that very same thing. When it comes to working with our sales colleagues, we go to them with our tactics and our campaigns and our programs. And we want to sort of have a one-size-fits-all approach to meeting the needs of the sales organization. But that doesn't really work very well. Why is that? Well, the sales organization is a complex beast for most of the clients that we work with.

So sales have been organized around different kinds of accounts. Typically, organizations will have strategic accounts, the most important accounts that they really need to focus on, maybe the top 10 or 20 or 30, the number varies. There usually are some set of accounts that an organization cares more about than anything else.

**Alisa:** Then we often have what we see are named accounts, sort of the next tranche down important accounts, but maybe not at the top of that pyramid. And then it kind of works its way on down to maybe accounts that are in a particular industry or segment and then finally kind of commercial or territory kinds of accounts. But we'll have geography reps in those sorts of things, and sometimes bars will be thrown in the mix and sometimes we have organizations that have channels that they sell through. So the sale organization is typically very complex. Marketing is complex, but in a different set of ways. Right? We have marketing teams with different functional disciplines. So in the organization, that might be a group that does corporate events, and we might have a group that does portfolio marketing – all of the product oriented content in those sorts of things. We'll have teams that use campaigns and demand gen, and maybe even an ABM marketing team. And then finally, we have field marketing organizations that typically are sort of embedded out there in the field. And the challenges is that we often have those teams in marketing that you see over on the right hand side approaching these sales leaders and district managers and so forth, saying, hey, let me work with you for this particular product launch and then we'll have a campaign team that will go to all of these accounts and say, hey, we've got a campaign that we're getting ready to launch.

**Alisa:** We want to launch it out broadly to the market. And then we'll have a corporate events team that will be putting on a great big event and wanting to make sure that then all of the key accounts that the whole organization cares about come to that event. And then finally, we've got this field marketplace and field marketing tends to be a bit better in terms of working with sales because they are embedded out there in the field. But nonetheless, we've got this kind of inherent mismatch, if you will. It kind of comes back to that traditional hammer trying to get the screw into the wall, kind of a problem. And so we need to do a better job of that marketing approach, needs to be aligned to sales strategy. We need to be able to say, OK, Mr. Chief Revenue Officer, if you are having a set of geographic accounts, a territory, if you will, we're going to run what we call

demand marketing approach is going to be pretty broad based traditional demand generation.

**Alisa:** If you have industry accounts, we are going to match you with a vertical marketing approach. We're going to apply industry subject matter experts and develop some content that's going to work for you there. If you have named accounts, let's say a few hundred accounts that represent disproportionate upside revenue potential for the company, and you have named account reps with relatively small territories. We are going to up our resource level and meet you there with the right marketing programs. And then finally, if you have a very small number of must win accounts, large pursuit deals, we're going to apply something called large account marketing, a very focused ABM approach. That's the kind of thing that we want organizations to be thinking about. And that's going to depend on the ability to do this. The ability to do this matching process is going to depend a lot on a few key factors. And so I want to walk you through each of these three factors in a fair amount of detail and bring them to life. But before I do that, I'm going to stop here and Rick would love your comments and thoughts around this issue, this big picture issue of marketing and sales alignment.

**Rick:** Yeah, thanks, Alisa. I mean, it's interesting seeing how you present that with the two pyramids there. And I totally agree with you. The alignment of marketing and sales is such an important topic. And a lot of organizations seem to still have issues with this. I mean, at Virtual Causeway, we've been working with companies since 2001 that continue to have these issues. And many of our client engagements require us to kind of bridge that gap between sales and marketing. Now, do you have any specific recommendations around accountability for each group, though? I mean, we're talking about sales and marketing. It's easy to blame one group and develop kind of unrealistic expectations. So what are some of the things that you can do to keep both of the groups focused on the same thing?

**Alisa:** Yeah, I mean, it's a really good question. And we get it from clients all the time. I would say that there are shorter-term, more specific kinds of things that organizations can do, and then there are a longer-term sort of structural fixes, some of the short-term things that organizations can do. I mean, it sounds really simple, but get into a room together, at least in the annual planning window at the beginning of the year and say, how are we going to look comprehensively at what we need to do together? What our

two organizations need to do together at the end of the day, know we all need to be generating pipeline and closing business. So the more that marketing can look to that as a goal and say how can we support sales in getting better pipeline, it's not just about running the best advertising campaigns for all of these things that we think of as kind of top of all kinds of activities. But in the end, how do we generate interest and awareness in our brand? How do we get people engaged and how do we make sure that we have the right kinds of accounts and the right kinds of buying groups and the right kinds of personas engaged in the marketing that we're doing? Because at the end of the day, we want that pipeline.

**Alisa:** We want those leads to convert. And so there's a lot to be said in terms of metrics, joint metrics. That doesn't mean that marketing doesn't have to have accountability for certain kinds of activities that might be more upstream in a buyer's journey and that sales doesn't continue to have accountability for things that are a little more downstream in terms of taking a deal or an opportunity to closure. Those accountabilities still exist. But the more we can move towards joint metrics, the better off we are. And so we encourage our clients to do that, at least in the annual planning process, if not revisiting those metrics with more joint dashboards as the year goes on. We're also seeing along the same lines, we're seeing more and more organizations actually collapsing organizations together and creating revenue operations teams where marketing and sales are actually coming together under a chief revenue officer. And I think that reflects this idea that if you're measured on a joint set of metrics, you're going to have more collaborative aligned behavior. So we're seeing that trend going in the marketplace as well.

**Rick:** Well, it's great hearing analysts like yourself talk about this, because I feel like I spend most of my time over the past 10 or 20 years being referee between sales and marketing. So it's great hearing other people talk about this, because I realize I'm not alone. And you know what you discussed about having some of these joint metrics and maybe even service levels developed between organizations? I think that's a really key part, especially with a lot of the work that we do for our clients. That's really a key part of some of these engagements and making sure that the expectations are developed the right way between both organizations.

**Alisa:** Sales and scoring at all gets into the operational details. But it's kind of where the magic happens, really. So, yeah, absolutely.

**Rick:** I hope you found that segment helpful. I'd be happy to send you the link to the full webinar playback and the related research brief that goes along with it. You can email us at [info@v-causeway.com](mailto:info@v-causeway.com) or drop by our [website](#).

And I want to say that while the content of that webinar is really important, it may not be the most important growth strategy for your business right now. At Virtual Causeway, we've identified several B2B growth strategies. So let's schedule some time when we can figure out the One Big Thing that will have the most impact right now in our Strategy Session. With you we'll investigate the sales and marketing challenges you're currently facing, utilizing tools to discover your current customer experience and map these findings to a spectrum of potential growth strategies to identify that One Big Thing that will have the most impact right now. I look forward to arranging a strategy session with you to identify that One Big Thing so you can accomplish all of your growth objectives. You can reach me at **866-211-6549**. Let's talk soon and have a great day.