



"WHAT'S WORKING" SERIES

The B2B Playbook For Sales & Marketing Alignment

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Introduction

Sales and marketing go together like oil and vinegar — or like cats and dogs. But no matter what metaphor you choose, there's an undeniable disconnect between the two departments. In fact, 90% of sales and marketing professionals **report misalignment** across strategy, processes, content and culture, while an additional 60% agree this misalignment directly hurts their company's financial performance.

"Sales and marketing alignment is a major issue today," said **Kelly Hopping**, **Demandbase's** Chief Marketing Officer. "In the U.S. alone, this lack of coordination leads to a wasted **\$1 trillion** or so every year. With teams more spread out, heavily reliant on technology and navigating an unpredictable economy, things have only become more challenging — in fact, 48% of teams said they're not aligned, according to the '**2023 C-Suite Go-To-Market Benchmark Survey**.'"

Whether it's due to different measurement metrics or a lack of communication, these disjointed teams are ultimately providing customers with differing messages, which results in confusion, lost deals and a bad reputation. In fact, **67% of B2B buyers** say inconsistent messaging is one of their top reasons for disliking a vendor.

Throughout this special report, we'll examine the current state of marketing and sales misalignment with a focus on the actionable steps leaders can take to unify these two departments. Specifically, this report will uncover:

- An in-depth examination of the root causes of misalignment to understand and address the source of the disconnect;
- The strategies and shared metrics needed to streamline lead qualification and increase hand-off efficiency;
- How to foster an environment of open collaboration and communication that creates a culture of accountability; and
- How to refine content processes to ensure consistent messaging across all marketing materials and subsequent sales conversations.



PLAY 1:

Identify The Root Cause Of Misalignment

Traditionally, sales and marketing misalignment in B2B marketing often stems from a lack of collaboration between the two. In fact, recent research found that **90% of sales and marketing** professionals cite miscommunication or lack of communication as the top barrier to alignment, which ultimately leads to misunderstandings about objectives and strategies.

"Few people realize that sales and marketing were never created to be aligned in the first place," said Hopping. "Early on, marketing was more of a communication and 'arts and crafts' department, while sales was about long lunches and golf games. Only over time have we begun to recognize the untapped value in the intersection between the two — and a glaring lack of relationship is the heart of the issue."

Beyond operating differently, "sales and marketing approach their work differently," said **Pam Didner**, B2B marketing consultant. She continued that marketers tend to focus on the top of funnel, while sales tends to focus on the bottom; marketing talks about the buyer's journey, while sales discusses sales stages.

That divide in processes leads to inconsistent buyer personas and poor lead quality or handoff processes that can cause further disconnection, wasting resources and frustrating both teams. Furthering the divide is the departments' split focus on metrics and goals, as marketing's focus on lead generation and brand awareness versus sales' emphasis on closing deals and revenue often creates friction.



Uncovering & Clearing The Hurdles Impeding Sales & Marketing Alignment



A Q&A with Kelly Hopping,
CMO of Demandbase



Sales and marketing alignment is a tale as old as time — and something that B2B practitioners still struggle to combat. With **research suggesting** that aligned teams generated 36% higher customer retention, the *Demand Gen Report* team sat down with Kelly Hopping, CMO of Demandbase and author of “**Yes, It’s Your Fault**,” to get her take on the current alignment landscape, with a focus on how leaders can work to improve their internal processes to unite teams.

Demand Gen Report: *In your opinion, what’s currently working in aligning sales and marketing playbooks?*

Kelly Hopping: We’ve found that having shared metrics and goals is crucial. We focus heavily on pipeline and revenue as our north star. Regular meetings between sales and marketing, such as our “Pipeline Builders” sessions, have been instrumental in keeping everyone on the same page. We’ve also worked hard to create a culture of open communication and feedback.

One of our most successful initiatives has been “Shark Week,” where everyone from account executives, SDRs, marketers and more come together to collaborate intensively on pipeline generation for one solid week. It’s a great way to break down barriers, foster teamwork and have some fun!

DGR: *What are the most common pain points you see organizations face when trying to align sales and marketing teams?*

Hopping: Alignment starts at the top, and sales and marketing must move in sync. As a CMO, I collaborate with sales leaders daily to ensure this alignment, and our unified approach sets the standard for managers, leaders and frontline teams.

Three common pain points are misaligned metrics, a disjointed tech stack and poor communication. Without a single source of truth and aligned technology, teams won’t speak the same language. Is your marketing team focused on MQLs while SDRs talk discovery calls? Are you aligned towards shared pipeline goals and use the same dashboard? And lastly, how often are you meeting and communicating?

DGR: *How do you define a successful sales and marketing alignment?*

Hopping: As discussed, shared accountability around metrics is a must. Win together, lose together. However, beyond metrics, success is characterized by collaboration, communication and clarity. That is open, transparent communication, collaboration on strategies and campaigns and clarity surrounding what is the path to success and who owns it.

We have to set expectations. For instance, which campaigns are a priority? Is it a competitive takeout or a new product launch? What are we expecting to see from this campaign — did we anticipate our tier one targeted accounts to register for this event? From this open dialogue of what the market needs, what the campaigns should be and what success looks like, my team can bring this strategy to life. This unified go-to-market (GTM) strategy culminates into successful sales and marketing alignment.

DGR: *What role does technology play in fostering collaboration between sales and marketing?*

Hopping: Technology plays a crucial role in fostering collaboration. You need a single source of truth and without the proper tech stack, you won't be able to achieve true alignment. Technology drives our strategy to have unified data and streamlined processes. For instance, technology offers shared dashboards between teams and visibility into the key metrics mentioned earlier. It also enables better attribution and supports joint planning and strategic alignment. As an account-based sales and marketing organization, technology ensures that we are all focused on the same accounts and rowing in the same direction.

DGR: *How can organizations break down silos and create a shared language between the two departments?*

Hopping: To break down silos and create a shared language, we encourage regular joint meetings, shared metrics and shared dashboards. Something else that we take a lot of pride in is sharing our deal stories across the GTM teams. When a deal closes, it's so rewarding to see how the various GTM teams worked together, whether a fellow marketer on my team presented to a prospect or the customer success manager presented on behalf of the future account team. It's important to see the cross collaboration and how we as an organization broke siloes to bring in a new customer. Ultimately, it's about fostering a "we" culture of respect and collaboration.

DGR: *In an ideal world, what does the combined sales and marketing playbook look like?*

Hopping: In an ideal world, a combined sales and marketing playbook should follow the customer journey. This should start with the key stakeholders and clear definitions of roles and responsibilities. From there, the stages of the journey should be defined — everything from awareness, to selection, to onboarding, to retention and finally expansion. These stages should guide leading and lagging indicators of success, as well as goals and actions for each stage. Lastly, each stage should have clear exit criteria and definitions around handoffs between teams.

In addition to following our customer journey, this playbook must showcase the shared metrics and the ladder of programs across the GTM teams to meet those goals. Having ownership of those programs and initiatives will drive alignment and proper execution.



PLAY 2:

Build Relationships By Collaborating

The first step to bringing teams into lockstep is to lay the groundwork in place, which, according to Courtney Beasley, Fractional CMO and Founder of [cobe marketing](#), starts at the top. She continued that alignment typically isn't fostered from a senior level perspective, ultimately impacting communication down the ranks.

"A lack of prioritization in the C-suite leads to a breakdown in communication or collaboration between the other departments," continued Beasley. "So, there are obviously several complications that come along with it, but there are also several things you can do to try and work toward it — and the first thing is relationship-building."

According to a [recent LinkedIn post](#), revenue roles — CRO, Head of RevOps and more — are one of the fastest growing jobs, and are poised to head up sales and marketing. Andrea Eaton, VP of Global Revenue marketing at low-code development platform [Outsystems](#), explained the importance of starting alignment in the C-suite and called on senior leaders to foster collaboration and communication.

"Alignment comes from business planning and a shared understanding of your customer," said Eaton. "Once you understand your targets for the year and where they're supposed to come from, then teams can work together to form joint plays and discuss how to make it work."

Specifically, some of those shared understandings should include:

- Who the ideal customer is;
- What motivates key personas within buying groups;
- How to best convey messaging to those personas;
- The best way to differentiate delivery and messaging; and
- Alignment on the value proposition to help with acquisition and retention.

With that foundation in place, Beasley added that it then comes down to the humanistic part of being a team, which typically includes sharing templates, resources and RACI models that help people understand what's expected of them.

"Most promotional alignment comes down to the relationships you can build and the small ways you can promote cohesion, such as changing 'sales and marketing alignment' meetings to 'GTM positioning,'" she continued. "Alignment requires a holistic approach of realizing that it's a mindset between the teams."



PLAY 3:

Bring Everyone Together Into One GTM Team

One of the best ways to promote continued alignment — according to the experts — is to bring all the teams together into one unified department. B2B marketing consultant Didner explained that this includes forming one GTM team, which requires leaders to scope out the timeline and determine what they want to accomplish by setting clear objectives.

"Those objectives must be specific — 'I want to build awareness' or 'I want to generate demand' are too general," said Didner. "Instead, maybe you want to get 100 leads or create pipeline opportunities. This allows the product team to put together a relevant value proposition, the salespeople will point out their target accounts and then marketing can create the appropriate content for the accounts based on the value proposition."

For example, some of those shared metrics should include:

- Lead generation insights, such as the number of leads generated, their quality and the conversion rates;
- Lead qualification through the lens of lead-to-opportunity conversion rates and sales cycle length;
- Customer acquisition cost, which includes analyzing cost per acquisition versus customer lifetime value;
- Customer retention information, such as churn rate; and
- Overall return on marketing investments.

"Once you understand your targets for the year and where they're supposed to come from — whether it's net-new or upsell — teams can come up with joint plays," said Eaton. "These enable them to talk about how they're going to hit those goals and develop a shared understanding of key foundational elements, such as ideal customer profiles, key personas within buying groups and messaging."



Conclusion

At the end of the day, aligned sales and marketing teams generate **209% more revenue** and a **20% annual growth rate** — meaning it's imperative for businesses to establish strong alignment between their internal departments and take the steps needed to ensure that alignment doesn't falter.

"The key is to align early and stay connected as often as possible," said Beasley. "You need to stay very committed to it and know that it is a lifelong journey. Make sure that you're coming back together as often as possible to level set to check in on your initiatives, see how things are operating and performing and stay committed to seeing the results."



Demandbase is all about AI-driven GTM. We help B2B companies hit their revenue goals using fewer resources. Want to know how?

We do it by aligning your sales and marketing teams around a combination of your data, our data, and artificial intelligence. It's what we call Account Intelligence and it helps you identify, engage, and focus your time and money on accounts that are most likely to buy. That's the power of AI.

415.683.2660

INFO@DEMANDBASE.COM



Demand Gen Report is a targeted online publication that uncovers the strategies and solutions that help companies better align their sales and marketing organizations, and ultimately, drive growth. A key component of the publication's editorial coverage focuses on the sales and marketing automation tools that enable companies to better measure and manage their multichannel demand generation efforts.

201.257.8528

INFO@DEMANDGENREPORT.COM



The sales and marketing alignment conversation doesn't end here! We're hosting a complementary webinar with our friends at Demandbase on Sept. 4: [Register now!](#)



Kelly Lindenau

is an editor and writer who loves covering the latest B2B marketing trends, research and industry insights. She's a New Jersey native, runner and reader who always has a GIF from The Office at the ready.

