# Selling Marketing to Sales

*10 Ways to Help Sales Teams Successfully Leverage Marketing Tools & Resources*

*By Leslie Vickrey, President & Founder, ClearEdge Marketing*

In business today, there is a popular myth that tells of a bitter, irreconcilable rivalry between sales and marketing teams. Sales teams don't believe their marketing counterparts understand what they do or what they need to sell. Marketing teams don't believe sales professionals take the time to learn and leverage the tools they create. As for me, I don't believe any of it at all.

For more than a dozen years, I have worked hand-in-hand with sales teams as their core marketing resource and selling partner. What I have learned as a marketing professional who supports sales teams is this: successful marketing is fundamentally dependent on building and constantly nurturing a strong relationship with sales teams (and also recruiting teams in the case of IT services companies). If there does exist a deep chasm of misunderstanding between sales and marketing, then the marketing team is failing in its job of communicating its strategy and efforts to sales.

Why does more of the responsibility belong with marketing? Because marketing is a service department and its most important client is sales. All good relationships are a two-way street; but, when it comes to the sales-marketing relationship, marketing is responsible for laying down the original roadwork. When there is strong understanding and a fluid working relationship between sales and marketing, the business wins. When sales teams understand the methods behind marketing programs and tools, they enthusiastically and effectively use them, dramatically improving the results of prospecting and new business development efforts.

At ClearEdge Marketing, we have developed a comprehensive system of checks and balances for ensuring that we are best serving the sales teams we support. Below you will find a 10-step checklist your marketing staff can use to ensure they are doing everything possible to help sales teams understand and successfully leverage marketing programs and tools.

### 1. Marketing Tools Are Aligned to the Sales Cycle

First and foremost, marketing tools should be aligned to the sales cycle. Sales teams must have marketing resources at every stage of the sales life cycle, which ClearEdge defines as the following six phases: the prospecting phase, the introduction phase, the presentation phase, the follow-up phase, the opportunity (win or lose) phase, and the ongoing maintenance phase.

Marketing teams need to design tools that support their sales teams at every juncture of the sales process. It's easy to assess how well equipped a sales team is across the sales cycle. Simply look at each phase and see what tools are there to support it. Does the sales team have strong tools in place to support their prospecting efforts? What kinds of collateral materials can be used as follow-up tools after a successful meeting or presentation? What are the tools and documents sales teams should be using during their pitches and presentations to clients?

A strong marketing team will have the sales cycle carefully mapped out and will have built strategic tools to support each and every phase. When a sales professional can turn to the marketing arsenal at anytime for an appropriate tool that communicates the firm's value, reliability and expertise, marketing has not only done a good job of equipping sales teams, it has increased business efficiency. The less sales teams have to go hunting for resources and collateral, the more time they have to sell.

### 2. All Account Executives Have Targeted Account Lists

It may sound elementary, but every sales professional/account executive should be working off of a short, targeted account/prospect list. By building separate, vetted targeted account lists, a business maximizes its sales efforts. Account executives will not end up calling into the same accounts or accidentally calling up an existing client. Additionally, lists that are targeted and short (ClearEdge recommends no more than 20 prospects per account executive), give account executives the time needed to focus intensely on those prospects and win their attention through persistent sales and marketing efforts.

### 3. Sales Teams Participate in the Development of Materials

One way for marketing to quickly frustrate its sales colleagues is to work in a vacuum. Account executives are out on the frontlines selling, speaking with prospects every day. They see the sales materials other companies use and know what catches the eye of a prospect in a sales meeting or at an event. If they are not engaged in the process of developing sales literature and collateral, marketing is wasting a tremendous resource that can help strengthen the value and message of sales materials.

Sales professionals should participate in the various aspects of collateral and program development. Marketing needs to take time up front to interview their sales colleagues to find out what they need. Ask account executives what is missing from their sales arsenal. Find out what tools are working best for them and why. Get their insights on the kind of feedback clients are giving—be it negative or positive.

Once marketing knows what the sales team needs and has built a strategic plan for developing the right tools, it's also critical to engage sales in the creative process. Identify a few key sales professionals and managers who can serve as a review and input committee. Their presence will not only help improve the quality and impact of the marketing tools, it will also help win over the entire sales team once it's time to deliver the marketing programs and literature and put them to work. If sales teams know that their perspective has been personally represented in the creative and strategic process, they will not think of the tools as "marketing's tools." They will accept them their sales tools.

### 4. Senior Executives Are Approving All Tools/Materials

Just as it's important for sales teams to participate in the development and approval of marketing materials, senior executives (CEOs, COOs and even CFOs) should have a vocal and visible role in marketing tool development. Senior executives not only have proven themselves as the best sales professionals the company has to offer, they bring needed authority to the marketing approval process. Engage senior executives in the development and approval process as a way to garner their valuable sales knowledge and as a way to demonstrate to sales teams that marketing is working with leaders across the organization to develop the best, most effective tools.

### 5. Training Sessions Are Regularly Provided

Marketing today is not simply brochures and advertisements. Marketing successfully in the face of constant media and advertising buzz takes strategic, persistent, long-term strategies that capture the attention of top prospects. Target account programs (TAPs), keep-in-touch (KIT) programs and other relationship marketing tools are sophisticated, multifaceted strategies that require several steps and strict scheduling. Marketing should not assume that a detailed e-mail or cover letter along with the program kit is enough to help their sales teams understand the process and the schedule.

Take the time, effort and investment to provide live training (classroom or Web based). Marketing should have the opportunity to run through the program, its materials and its schedule while account executives should have the opportunity to ask all the questions they have. Sales professionals are often too busy with calls and appointments to give a written overview of a marketing program intensive attention. Scheduling a Web-based or in-person training, locks them into a one-time training, which allows them to review all materials, learn the program and get back to work.

### 6. Marketing Materials Are Centrally Located

Easy access is critical to the widespread and regular usage of marketing materials. If sales teams can instantly access the most recent program components, sales literature and presentation templates created by marketing, they are more likely to use them consistently and without complaint.

In the old days, every office had a marketing closet, shelved with the various brochures and service write ups. Today marketing teams can build rich online marketing libraries where account executives can quickly view, order and access the tools they need.

Over my career, I have helped several businesses establish a variety of Intranet-based marketing libraries, and there are endless ways of structuring and stocking them. What I have found each time is that simple always works best.

∑ Make tools easy to find, by ensuring categories are recognizable by the people who need them (sales people). That often means, reducing your marketing-speak and using the language of the sales team.

∑ Navigation should be user-friendly and information should be clear and concise.

∑ Most importantly, the online library must be religiously kept up to date. If sales teams are finding out-dated tools and information, they will quickly abandon the library and the resources within it.

### 7. Marketing Programs & Tools Are Regularly Measured

If sales teams know that a specific marketing program or tool has delivered significant results, they will adopt it into their sales routine. Marketing should ensure they are partnering with sales to monitor and measure the success of each program and reporting those results to the field. This continuous measurement not only creates a way to broad-

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cast success, it is also a way for identifying roadblocks or challenges that sales teams face in the delivery of a specific marketing program.

While measuring the specific success of a widely used and general marketing piece, such as a brochure, is difficult, marketing programs that are directed at a targeted list of prospects are easy to measure. Marketing needs to ensure that sales teams are provided with a simple system for reporting the number of times a prospect is "touched" (receives materials, a phone call or a visit from the account executive) and is able to report when a proper sales meeting has been secured as a result of the program. Businesses use a wide range of programs for measuring marketing program progress, from the online tools within Salesforce.com to simple Excel spreadsheets. As long as results can be quickly aggregated, simple solutions like Excel work just fine.

### 8. Sales & Recruiting Teams Are Regularly Surveyed

As mentioned before, the success of certain marketing tools, like brochures and information sheets, is harder to measure. The best way to garner good insights on these tools is to analyze which are being used the most (watch printing and ordering numbers) and to survey the sales and recruiting teams on a regular basis.

Marketing needs to find out what brochures and sales literature are working best and why. They also need to learn why some tools are not being used by sales and recruiting colleagues. Surveys sent out periodically can help marketing identify ways to improve sales materials and provide insight into the kinds of reception the materials are receiving from clients and candidates.

### 9. Marketing Is Going Out on Sales Calls

To really understand the challenges clients face and how sales teams must quickly address those needs during new business calls, marketing needs first-hand experience. Marketing professionals in the IT services industry should shadow sales representatives on new business calls and shadow recruiters during candidate interviews and visits with hiring managers.

This invaluable field experience gives marketing precious insights into the mind frame of customers and candidates. It also gives marketing professionals a deeper understanding of the sales and recruiting challenges their colleagues face and allows them an opportunity to see their tools in action in the marketplace.

### 10. Communication Channels Are Open & Busy

Great relationships begin with regular communication, which is where I will end this article. Marketing and sales teams should be strong collaborators who meet on a regular basis to discuss issues and challenges. To ensure strong, straightforward communications, marketing should establish a regular meeting schedule with key sales leaders while also providing opportunities for sales representatives at all levels to get to know their marketing team.

Marketing can also establish feedback tools, such as a general marketing e-mail or online feedback center, where sales teams can share their insights into programs and tools. Create discussion boards, invite questions and let sales and recruiting teams know that marketing "Wants to hear from you!" Giving sales teams various opportunities to be heard and share ideas will result in improved working relationships as well as greater support for marketing and its programs. As the communication and overall relationship between sales and marketing improves, business development results will rapidly increase as well.

The fact is that marketing and sales go hand-in-hand, whether they like it or not. If the two groups can make a strong effort to like it and learn from it, they will become a more powerful, more confident and more successful force of new business generation. ❖

### About the Author

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