
# The 5 Biggest Alignment Challenges Facing Marketing & Sales Teams

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# Overview

There's a reason why talk about marketing and sales team alignment is all the rage right now. It's the basis of so many important and emergent marketing and sales trends – the move from lead gen to demand gen, the shift to Rev Ops from siloed ops, selling to a committee vs. an individual with account-based marketing (ABM), and making a move towards asynchronous selling.

While there are many upsides to this alignment, there are just as many obstacles facing teams as they try to get on the same page. Read on to break down the top five challenges facing marketing and sales teams as they try to align, as well as a few solutions for making team alignment a reality.

# Marketing-to-Sales Handoff

The marketing-to-sales handoff seems simple enough: when a lead becomes qualified for sales (a sales-qualified lead, or an SQL), it's the job of the marketing team to ensure that their sales colleagues know about it.

What could go wrong?

The answer is...a lot.

To generalize, there are two areas where this handoff can go awry.

The first is the qualifying criteria or the agreement around when the right time is to hand the lead off to sales. Think about it: what are your marketing-qualified lead (MQL) and SQL criteria? What are you using to ensure that these criteria are met for handoffs day-to-day? How nuanced are the qualifications?

If your sales and marketing team may have different answers to these questions, the result can be handoff nightmares.

The second problem area involves the mechanism for your handoffs. Are your marketing leads rotated automatically once qualified, or do they already have an owner before they ever get to that stage? Do you assign your sales rep a task, push a notification, send them an email, notify them in Slack, or some combination of these options?

Tools like Marketing Hub and Sales Hub are great at facilitating this process, but the process only works insofar as it has been defined. The marketing-to-sales handoff must be thought through and agreed upon by both teams to be successful – a task made much more difficult if your teams are not operating in the same systems.

# The Solution to Difficult Marketing to Sales Handoffs

To address a less-than-perfect handoff from marketing to sales, have a meeting between your marketing operations and sales operations teams to agree on the complete parameters of your lifecycle stages.

Ask your teams what role deal stage, lead score, buying committee makeup, and ICP tier play in the timing and manner of the handoff?

Handoffs can change from team to team, ICP tier to ICP tier, and product to product.

Next, pull some reports to see at what lifecycle stage sales became involved in winning opportunities to objectively determine what has been most successful to date.

Finally, once everyone agrees on the terms of your lifecycle stages and when and how sales should be tapped to jump in, update your CRM, marketing automation platform, and other technology to accommodate these newly agreed-upon handoff guidelines.

# Disparate Systems

There are literally hundreds of tools that your sales and marketing teams could use to run their individual motions.

What's the result? A list of tech tools the size of a Cheesecake Factory menu for your marketing operations team to deal with.

For marketing and sales activities – especially those that require a handoff – data accuracy is everything. And the more tools you have, the lower the chances are that your data is reliable.

Too many systems can lead to:

- Too much context switching and the necessary info not being added to the correct tool
- System syncing issues and resulting data gaps
- No single source of truth for decision making about the success or failure of your efforts
- Misaligned handoff and scoring criteria

# The Solution for Disparate Systems

Disparate systems can be one of the harder problems to solve because organizations may have multiple internal stakeholders and decision makers involved. Nevertheless, there are a few ways to address this issue.

First, you can look at moving all of your marketing and sales operations into a single tool like HubSpot, where Marketing Hub and Sales Hub can accommodate all of the needs for marketing and sales alignment and provide a seamless experience for your customers.

If combining systems is not an option, consider doing an audit of where information is not being collected, synced, and updated between systems. This can impact things like lead scoring and lifecycle stage updates, which are crucial to keeping sales and marketing aligned. Reporting can also be impacted and lead to decisions made on incomplete information.

Additionally, you will want to do a capabilities assessment of your current systems to ensure that they can achieve all of your goals. Can your systems trigger actions in one another to ensure that both sales and marketing stay on the same page? If not, check outside of your tools' native functionality using platforms like Zapier or Workato.

# Inconsistent Data

When you have too many tools, weak processes for using your tech, a lack of operational leadership or any combination of these things, your data suffers. When you can't trust your data, you are flying blind when it comes to making decisions that impact your customers.

Bad data doesn't just lead to bad calls because you can't properly forecast your sales team's pipeline.

Bad data means that we don't personalize campaigns, we get the handoff wrong, we put people into the wrong segmented cohorts, and that we over or under-touch our prospect accounts.

The truth is, data drives your revenue engine. Everyone in your revenue operations – marketing leaders and implementers, sales managers and reps, and customer success teams – needs data to drive decisions around how they interact with customers.

# The Solution to Inconsistent Data

Often, solving the issue of disparate systems will also solve your data problems. But in instances where that's not the case, other solutions are in order.

If you are not getting the data you need for sales and marketing to align and make insightful, helpful decisions, your data collection processes might be in the way.

The first thing you will want to do when you're thinking about your process is to interview your team to see what obstacles are preventing them from adding data. Do you have the most commonly populated properties in the left-side views of the correct records, broken down into sections? If not, then note this down as something you can improve.

Next, take a look at how you can use automation to tighten up your processes and keep your data clean in the process. For example, can you use automation to create records or move them from stage to stage of a pipeline to ensure that the data surrounding those activities stays accurate? Can you duplicate or update properties using workflows to reduce manual entry?

Finally, make sure that all of your systems are sharing data regularly and automatically. This will ensure that everyone and every automation has the right data at the right time. And of course, condensing your tech stack will help you to keep data consistent.

# Misaligned Goals & the Battle Over MQLs

All marketers are familiar with this play: gate content to capture an MQL to then send to a sales/business development rep (SDR or BDR, respectively). That SDR/BDR then prospects in concert with marketing to move this person into the coveted SQL lifecycle stage.

Once the lead becomes an SQL, the account executive takes over and closes the deal, won or lost.

This play seems fair enough on its face. It has been used thousands of times by thousands of marketers. But if we're talking about alignment, this play relies on a process laden with potential land mines.

Think about it: if the marketing team has a goal to drive MQLs and they are assessed based on their ability to meet that goal, their sole focus will be on how to get as many gated content downloads as possible.

What's the issue with that? Well, it turns out that the audience most likely to read your content is not necessarily the audience that wants to buy your product now.

If sales is judged by the number of MQLs they convert to opportunities, company friction is baked into the system: the marketing team meeting their goals is out of alignment with sales reaching their goals.

Teams focusing on generating MQLs rather than revenue and demand will continue to struggle with alignment and will leave themselves ill-prepared to run ABM campaigns or to provide a seamless experience for their customers.

## The Solution to the MQL Battle

Reach out to your sales counterparts and have a conversation about how you can set up processes, regular stand ups, and other means of listening to and learning from each other.

Sales can teach marketing a lot. For instance, what happens on calls with MQLs? What objections does the sales team run into over and over? Which content assets do people make mention of in calls?

On the other hand, sales can learn from their colleagues on the marketing side of the house. What content is marketing serving and why? How have they altered the targeting, and how is sales seeing it play out in sales calls? What content is consumed most in deals that result in "closed-won" outcomes?

Once sales and marketing have more understanding of one another, they can make informed choices that help both teams win. Once there is mutual understanding, the teams can begin to have conversations about important choices that can greatly impact pipeline:

- Should we focus on capturing MQLs or should we ungate content to drive demand?
- Should we define an MQL differently than we currently do?
- How can we support asynchronous buying and get prospects to SQL or sales-qualified opportunity (SQO) status before getting sales involved?

This is a much more productive line of questioning than "Why did you send me so many junk leads this month?"

# Running Successful ABM Plays

The final alignment challenge in this series is the challenge of running successful ABM plays with misaligned teams. At the end of the day, you just can't do it!

All of the problem areas outlined above – poor handoffs, disparate systems, inconsistent data, and arm wrestling over MQLs – prevents an organization from running successful ABM plays, especially at scale.

Why is it so hard to knock your ABM goals out of the park when sales and marketing aren't talking? It's because ABM requires that you're not only aligned on one single MQL or SQL definition – you have to define an entire buying committee. This means even more handoffs, system, data, and goal alignment.

# The Solution to ABM Alignment Issues

If you are a HubSpot user, you likely know that you have a plethora of HubSpot tools to use for your ABM plays:

- Target Account property
- ICP Tier property
- Account Overview
- Suggested Target Account AI tool
- Prospects tool to see accounts who have visited your website
- ABM and Target Account dashboards
- Company scoring
- Buying role properties
- Workflow automations
- Chat bot or live chat
- Automated lead rotation
- Ads conversion events

# The Solution to ABM Alignment Issues

Here are some steps you can take to align your team for ABM:

- Verify that you have been collecting job titles and buying roles. If you have not, go back through your last quarter of closed deals and manually enter this information or update via workflows. For example, you can make sure to indicate that a certain job title is always a decision maker.
- Create a dashboard to understand the buying roles that have been involved in your recent deals and who usually shows up to the buying table first.
- Have a meeting between sales and marketing to review this information and agree upon the buying committee and who to prioritize.
- Follow the other solutions outlined above to ensure that your teams are aligned on goals, lifecycle stage definitions, handoff protocol, and that your data is clean and your systems are talking.
- Finally, use your Target Account and ABM tools to set up a campaign to support the alignment built between sales and marketing .

Who says that sales and marketing can't play well together? More often than not, alignment is within reach and just takes a little bit of learning and listening, followed by consistent action, to achieve.

# Conclusion

Today, customers are in control. Their expectations for service are high, and it's minimally painless and virtually cost-free to switch to your competitors if you aren't meeting them. And the old customer service playbook isn't working. Successful customers can grow your business faster than sales and marketing, but in order to get there, customer service professionals must take on a new, more human approach to service.

Interested in learning more about aligning sales and marketing teams?

Visit www.broadhurst.digital
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