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Don't Depend on Technology To Fill the Sales/Marketing Chasm

By Janet White, Info-Tech Research Group

It's a common scenario. Marketing dictates to sales not only how they have to sell products but also how they have to flag orders in the company's newly-implemented CRM system so that marketing can track customer lifetime value. Marketing becomes frustrated when sales doesn't come through with great revenue numbers from a campaign or doesn't make use of the leads they have been supplied. They think the sales department is lazy because they won't enter orders and customer information in a way that makes it easy to track conversion rates.

Now, imagine an organization where marketing and sales are partners in the customer life cycle. They collaborate for the benefit of the company and the customer.

First, marketing takes the lead to understand sales. Marketing managers go on sales calls with sales representatives and observe a real sales cycle. They are no longer just looking at statistics and campaign success numbers, but are speaking with account managers and customers.

Meeting with customers helps marketing see how the company's products are sold and puts them in a better position to brand products and services to the needs and preferences of their customers. They can now tailor and package collateral material that benefits the business processes of the sales staff. They can create a branding strategy that will appeal to the client base. They can package products in a way that makes the products easy to sell. In other words, marketing is meeting the needs of its client: sales.

Earning stripes

By collaborating with sales, marketing managers can understand how the sales process works and earn the respect and attention of the sales department. They earn the right to do the things they wanted to do in the first place. They can make tweaks to sales scripts and change sales processes to increase sales margins. Marketing has laid the groundwork to show the sales department the value of tracking a customer's lifetime value from an initial campaign to a loyalty program.

Sales and marketing now have a collaborative relationship that can benefit from a CRM system.

At this point, you are probably thinking, "That's a nice scenario, but it never happens in the real world. What marketing manager has time to go on a sales call or to talk to customers?" Well, a few years ago, a legal and financial planning publisher made some change to ensure that its marketing managers have time to walk in sales' shoes. In fact, the company's management thinks the relationship between sales and marketing is so critical to the success of its business that it has integrated a sales shadow program into its marketing training.

Historically, the sales and marketing departments at this company had been quite divided. The company had recently made a significant investment in a new CRM system and executives were committed to creating a collaborative sales and marketing environment. To do something about this, they moved two of their regional sales managers into marketing roles. Coming from a sales background, these individuals had a strong grasp on the issues faced by the sales reps, as well as the likes and dislikes of the customer base. By funding the education these sales managers needed to move into their marketing roles, the company positioned two people to succeed in the marketing department.

A third marketing manager was hired from outside the company. She was required to shadow a regional sales representative for two months. At the end of the two months she wrote a report outlining a difficulty that the sales rep had encountered and how the company could modify the product line's branding, marketing and sales process to minimize the problem. While management didn't implement all of her recommendations, the marketing manager did find the shadowing process invaluable. It helped her remember that she was there to help sales, not the other way around.

In particular, this new marketing manager came to understand why the sales staff bypassed entering some information into the CRM system. It wasn't because the sales staff was lazy but because entering the data frustrated the customer, who couldn't understand why the transactions took so long to complete. Marketing and sales were able to work together to come up with a solution that allowed marketing to capture the information it needed while streamlining the process for the sales rep and customer.

The moral of the story is that sales and marketing can't make use of the collaborative features available in CRM solutions unless they have already made human collaboration a part of their process.



Janet White, author of *Buying Right: Vendor and Software Selection*, resides in London, Ontario, where she works as a research analyst with Info-Tech Research Group, analyzing enterprise software for mid-size clients. White was previously employed as a project manager, running enterprise development projects for major automotive and high-tech clients across North America. White holds an honors bachelor of arts in history and a master's degree in library and information science from the University of Western Ontario and is a member of the Project Management



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