



Learn. Network. Grow.

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7 Tips To Bridge The Gap Between Sales And Marketing

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What this presentation is and who it's for

- It's mostly common sense
- Success is committing to action on two or three insights
- The key audience is B2B marketers responsible for delivering sales leads

Building before you understand is a recipe for disaster



Do engage directly with Sales

- Don't just ask about the sales process, observe it
- Ask about pain points
- Ask about goals and wish lists
- Solicit feedback from a cross-section of the Sales team

Do map any and all processes

- Existing
- New
- External

Don't lead with solutions

- List your biases (e.g. platform of choice, build vs. buy)
- Compare solutions
- Get external input

There's no substitute for good communication



Do focus on “what’s in it for me” (WIIFM)

- Simplify as much as possible
- Tailor communication by role

Do provide training and documentation

- Deliver content in multiple formats
- Ensure content is easily accessible
- Update content regularly

Don't put the onus on Sales

- Don't make others think too much, dig too hard, or wait too long

Too much data can overwhelm



Do align with Sales leadership on key metrics

- Measure what you treasure

Do take advantage of data visualization

- Track progress
- Uncover insights

Don't share data without a purpose

- Different views for different groups

The person closest to the relationship has the best understanding of it



Do give Sales the option to opt-out

- Leverage CRM visible lists to opt-out of campaigns or programs
- Use an Engagement Program to snooze contacts

Do encourage Sales to provide meaningful feedback

- Provide easy options to update details such as role and buying intent
- Utilize Customizable Campaign Influence

Don't get in the way when Sales is actively engaged

- Marketing can set its own "snooze" rules by Opportunity Stage

Setting up a "snooze" program



Step 1
Sales adds
contact to
"snooze" list

Step 2
Engagement Studio
adds contact to
suppression list with
30 day wait

Step 3
Marketing adds
suppression list
to email sends

Step 4
Engagement
Studio removes
contact from
suppression

PARDOT PEAK 7.1

CONVERSION CANYON 2.6

REVENUE RIVER 3.9

Intuition can't be automated



Do learn what lead criteria Sales values most

- Hint: It's probably fewer criteria than you think

Do review closed deals to better understand the ideal customer profile

- This hindsight data delivers insight to Marketing and Sales

Don't forget to incorporate grading with lead scores

- Grading helps weed out unqualified leads with quality behavior
- This helps negate any negative sentiment that Marketing leads are unworthy of follow up

The role of Marketing isn't to close deals, it's to make it easy for Sales to



Do focus on source and influence

- The less time Sales reps spend sourcing, the more time they spend selling
- Influence allows Marketing to share rather than claim credit

Do make follow up easy

- Marketing leads aren't the only leads Sales has
- A reputation of delivering quality leads will result in quality follow up

Don't overemphasize revenue goals

- Marketing doesn't have control over closing deals
- Claiming too much attribution leads to distrust

Building advocacy trumps getting credit



Do give credit as much (if not more) than you seek it

- Use data to tell the whole story, not just your role in it
- Sharing credit builds trust and partnership

Do ask for advocacy directly

- We all forget to give credit sometimes
- Advocacy uncovers deeper, harder to measure value

Don't claim credit you don't deserve

- It's not believable
- It builds mistrust and resentment

Conversation starters

- What data would be helpful to have?
- What are you spending too much time doing?
- What is helpful to know about our customers and prospects that I might not know?

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Thank you!

We appreciate your attendance at this session. If you have any questions please reach out to us via Goldcast or use the information below. We hope you enjoy the rest of the conference!

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