

THE COMPLETE GUIDE TO

# UNIFYING YOUR SALES & MARKETING EFFORTS



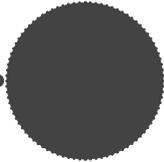
How to Create  
a Sales &  
Marketing  
Powerhouse

A publication of  
**HubSpot**



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Introductory content is for marketers who are new to the subject. This content typically includes step-by-step instructions on how to get started with this aspect of inbound marketing and learn its fundamentals. Watch our introductory webinar [5 Steps to Establishing an Effective Sales & Marketing Methodology](#).



### INTERMEDIATE

Intermediate content is for marketers who are familiar with the subject but have only basic experience in executing strategies and tactics on the topic. This content typically covers the fundamentals and moves on to reveal more complex functions and examples. Read our intermediate ebook [All You Need to Know About Aligning Sales & Marketing](#).



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Advanced content is for marketers who are, or want to be, experts on the subject. In it, we walk you through advanced features of this aspect of inbound marketing and help you develop complete mastery of the subject. After reading it, you will feel ready not only to execute strategies and tactics, but also to teach others how to be successful.

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## THE COMPLETE GUIDE TO UNIFYING YOUR SALES & MARKETING EFFORTS

By Ellie Mirman

Ellie leads the marketing for HubSpot's mid-sized business segment. Since joining in September 2007, she's worked on everything from lead generation to product marketing, and somewhere along the way, learned that she absolutely loves being a part of a fun and hard-working startup like HubSpot.

Ellie's specialties lie in lead generation, email marketing, and product marketing. She also has experience with event marketing, launching the first ever Inbound Marketing Summit in 2008, and growing new lead generation programs, including HubSpot's monthly webinar series attracting thousands of registrants to each event.



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“ *Mistrust and miscommunication between sales and marketing can act like an anchor on your company’s growth rate.* ”

By now, most marketers understand the importance of mending the traditional rift between sales and marketing. The mistrust and miscommunication that’s so often found between the two teams can act like an anchor on your company’s growth rate.

In fact, organizations with good alignment between sales and marketing teams achieved 20% annual revenue growth in 2010, [according to a study by the Aberdeen Group](#). By contrast, companies with poor alignment saw revenues decline by 4%.

While many companies work hard to generate better communication between sales and marketing, cracks between the two groups reopen over time. The bottom line is that achieving sales and marketing alignment can be tough, but maintaining alignment is even tougher.





FREE  
WEBINAR

# STEPS

to Establishing  
an Effective  
**Sales & Marketing**  
methodology



[HubSpot's 2012 webinar with salesforce.com](#) explores how companies can establish an effective alignment between sales and marketing departments. If you missed the live event, you can watch the on-demand recording with Linda Crawford, EVP & GM of Sales Cloud at salesforce.com, and Mike Volpe, HubSpot's CMO. The two leaders share lessons based on established internal practices as well as analytical insights from both HubSpot and data.com.

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Creating a solid, lasting partnership between sales and marketing requires a strategic approach that treats the two teams as a single, revenue-generating organization. At HubSpot, we call this organization the “Smarketing” team to recognize the fact that sales and marketing are critical partners. This perspective has helped our teams maintain strong ties even as we’ve grown from a handful of people to more than 100 staff members.



The key to the Smarketing approach is implementing a framework of data-driven tools and practices that help sales and marketing teams work better together. Once hard numbers have defined key stages of your funnel and outlined each team’s expectations, there’s a lot less room for sales and marketing to argue about each other’s performance. The results are plain for everyone to see.

This ebook will teach you the science of sales and marketing alignment and show you how to implement the six key elements of the Smarketing framework. In this way, the gains you achieve from better collaboration between sales and marketing can last in the long term.

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CHAPTER 1

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# SETTING UP CLOSED-LOOP REPORTING



“Using closed-loop data you can see which marketing programs deliver the best bang for your buck.”

Data is the crucial ingredient for maintaining sales and marketing alignment. You need data to monitor progress toward goals, analyze lead quality, and measure marketing ROI. So the first step in creating a Smarketing organization is establishing a closed-loop reporting system that tracks key marketing and sales metrics.



The two key pieces of this system are:

- ..... **MARKETING SOFTWARE**  
Marketing software like [HubSpot](#) that helps you generate and manage leads.
- ..... **CRM (CUSTOMER RELATIONSHIP MANAGEMENT) LIKE SALESFORCE**  
CRM like [salesforce.com](#) that helps you track and measure sales activities.

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# Sharing the Same Data

These two systems must be integrated to share data on every lead from creation through opportunity stage to close, so you can build reports that show the close rate and new customers from the leads generated by marketing. Many marketing software platforms integrate with CRM systems. For example, HubSpot’s marketing platform integrates with salesforce.com, SugarCRM, Microsoft Dynamics, NetSuite, Sage and several others.



Other features you should look for in a closed-loop marketing system include:

- ..... Automatic synchronization between the marketing platform and your CRM.
- ..... De-duplication of leads by matching on email address and tracking information, so as leads come back to your website you are updating existing lead records not creating duplicate leads.
- ..... The ability to pull information from the CRM into the marketing platform, allowing you to segment your leads by data the sales team has added to the lead or contact records.

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# Information Sharing

Next, start sharing information between the two platforms to help improve the performance of both sales and marketing.



## What should marketing share with sales?

### ..... COMPLETE LEAD INTELLIGENCE

Complete lead intelligence includes the history of each lead's activity on your website like campaign engagement, download history, and social media presence. Appending these details to each lead record helps sales reps plan their follow-up strategies and find hooks to start that first conversation.

### ..... LEAD ALERTS

Lead alerts are email messages or other notifications when a lead revisits your website, completes an important form, or takes another key action, such as requesting to speak with a salesperson.

These types of insights are available in [integrated marketing software platforms like HubSpot](#). See examples of both lead intelligence and lead alerts on the next page.

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LEAD INTELLIGENCE

**Mike Volpe**

**Timeline**

First Seen	Interactions	Lifecycle Stage
<b>Mar 9, 2011</b>	<b>143</b>	<b>Lead</b>
		Since Jun 2, 2012

**August**

- 1 Email
- 1 Page View
- 1 Sync
- 3 List Memberships

**July**

- 2 Automation Events
- 2 Emails
- 10 Page Views
- 1 Sync
- 2 List Memberships

**Interactions:**

- HubSpot Breaks World Record For Largest Webinar (Blog Post) - Tue Aug 14, 2012 at 1:28pm
- How to Use Pinterest for Business (Company Page) - Mon Aug 6, 2012 at 8:58am
- Synced 32 Properties to Salesforce (Sync) - Thu Aug 2, 2012 at 9:00am
- [New Ebook] 55 Branding Ideas (Email) - Tue Jul 10, 2012 at 8:49am
- How to Generate More Leads (Email) - Wed Jul 4, 2012 at 5:46pm
- Completed workflow (Automation) - Sun Jul 1, 2012 at 9:51am

**HubSpot**

One of your leads came back to [offers.hubspot.com](https://offers.hubspot.com):

**Mike Volpe**

Email: [mvolpe@hubspot.com](mailto:mvolpe@hubspot.com)

Company: HubSpot

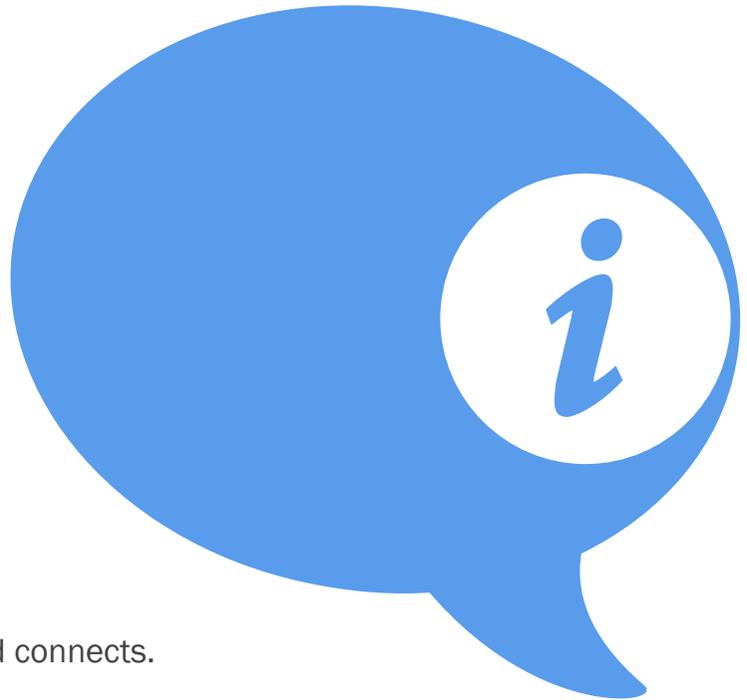
[View In HubSpot](#) [View In Salesforce](#)

LEAD REVISIT ALERTS



## What should sales share with marketing?

Your sales team also needs to keep marketing informed on their activities. Here are some suggestions for the type of insights sales can share with marketing:



### ..... CONTACT TOUCHES

Records of email and call attempts and connects.

### ..... LEAD STATUS UPDATES

Updates on lead status, such as open, in progress, qualified and unqualified.

### ..... REVENUE NUMBERS

Data on closed deals and the revenue associated with each contract to calculate marketing effectiveness and ROI.

These types of insights are available in CRM solutions like salesforce.com. See the next page for examples of lead intelligence, contact touches and forecast views.

Using this closed-loop data, you can track how each customer progressed through your marketing funnel and see which marketing programs are delivering the best bang for your buck. Getting your hands on this sales data in real time can help you be an agile marketer and make effective iterations to your campaigns.

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Campaigns Leads Accounts Contacts Opportunities Customer Subscriptions Reports Documents Dashboards Trials +

### Mike Volpe

Hide Chatter Follow

Post File Link

Write something...

Followers: No followers.

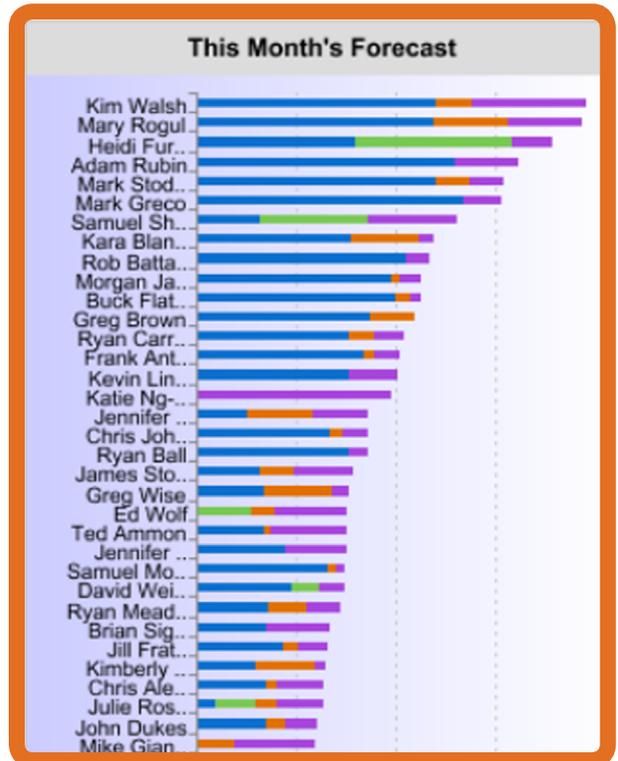
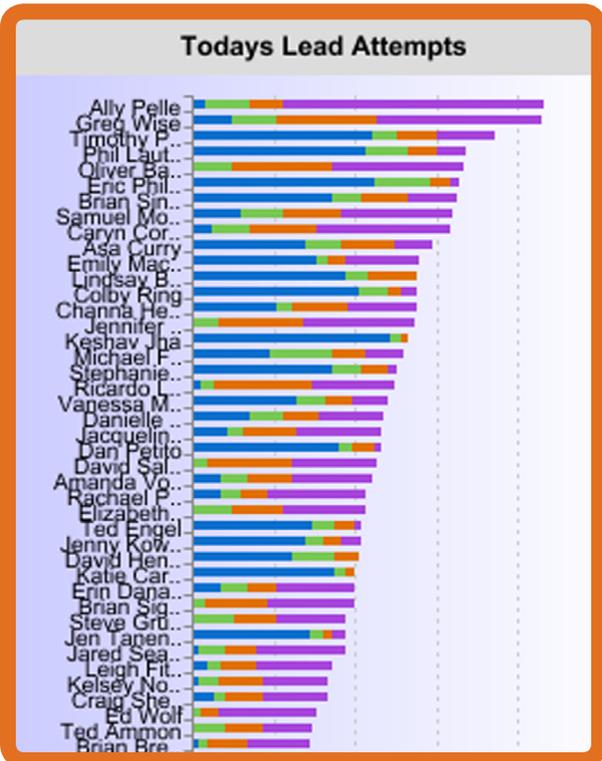
Sort by: Post Date

There are no updates.

Lead Attempts [0] | Open Activities [0] | Activity History [0] | Campaign History [1] | Lead History [10] | Trials [0] | Cases [0]

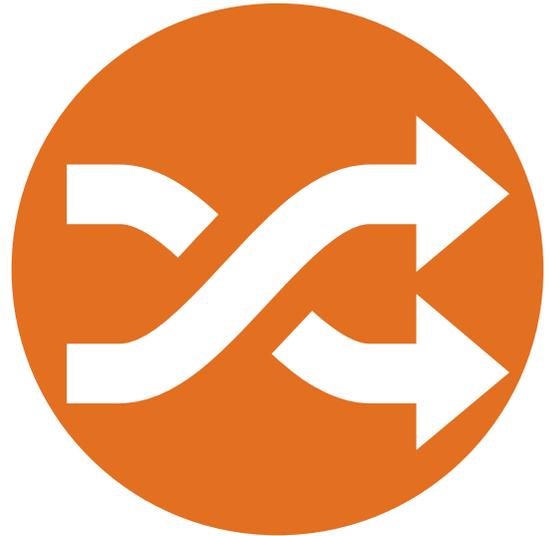
#### Lead Detail

Lead Owner	Ted Ammon [Change]	Lead Status	Open
Current Owner	Ted Ammon	Reopened	<input type="checkbox"/>
Name	Mike Volpe	Reason	
Title		Bad Lead Reason	
Company	hubspot	Website	<a href="http://www.hubspot.com">http://www.hubspot.com</a>
Record ID	00Q7000000gN1Cs	Int'l Domain Suffix	com
Record ID (18)	00Q7000000gN1CsEAK	Phone	6465912631
Partner		Email	mvolpe@hubspot.com
Partner Account		Role	Sales
Time Zone	EST	Emailing Allowed	TRUE
Description		Email Opt Out	<input type="checkbox"/>



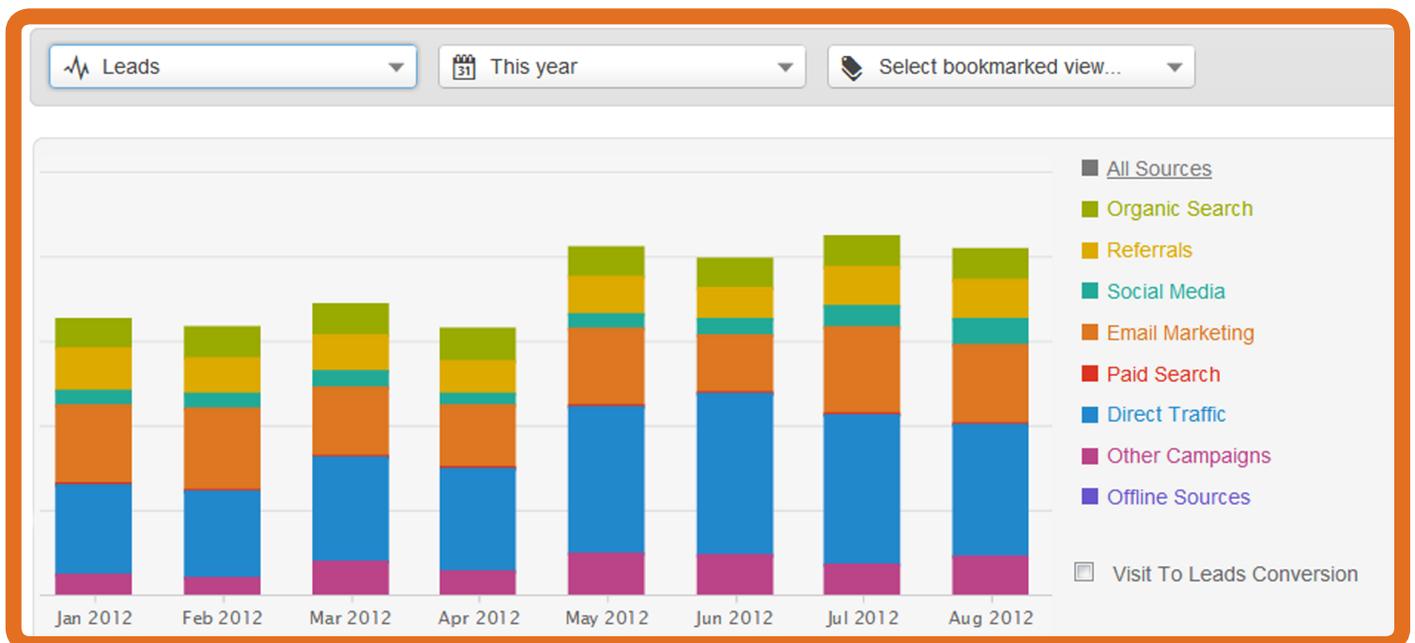
# Identify Winning Marketing Channels

Trace each customer back to the source of their first visit to your website – e.g., paid programs, organic search, social media, or email marketing. You should analyze each channel for key metrics such as:



- ..... Visits per channel
- ..... Leads per channel
- ..... Visit-to-lead ratio per channel
- ..... Lead-to-customer ratio per channel

Use this data to optimize your marketing mix and focus on the channels that are delivering the best conversion metrics.





# Identify Winning Marketing Assets

Examine the lead history of each customer and record every marketing touch and action that occurred between lead capture and close.

By calculating the percentage of customers who visited a specific page on your site prior to conversion, or who viewed a particular webinar or ebook, you can identify the most effective content in your marketing funnel. HubSpot's Conversion Assists tool provides this type of analysis.



Conversion Assists <a href="#">Tutorial</a> <a href="#">Tour</a>	
All Pages   Viewed By Customers   This month	
Page	Customers who viewed this page
<a href="http://www.hubspot.com/">HubSpot, All-in-One Marketing software</a> <a href="http://www.hubspot.com/">http://www.hubspot.com/</a>	56
<a href="http://www.hubspot.com/pricing">Pricing</a> <a href="http://www.hubspot.com/pricing">http://www.hubspot.com/pricing</a>	39
<a href="http://www.hubspot.com/products">Internet Marketing Software Products</a> <a href="http://www.hubspot.com/products">http://www.hubspot.com/products</a>	39
<a href="http://www.hubspot.com/customer-case-studies">Inbound Marketing Software Success Stories   Customer Case S...</a> <a href="http://www.hubspot.com/customer-case-studies">http://www.hubspot.com/customer-case-studies</a>	26

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This process also can include a review of specific market campaigns to determine which generated the most leads and customers. Or, you can look at which of your landing pages reached a higher-than-average conversion rate. The insights you gain from these reports can help you fine-tune your content strategy or optimize your site to promote more influential pages. For instance, check out [HubSpot's Landing Page dashboard](#) and some of the metrics we keep an eye on here:

The screenshot shows the HubSpot Landing Pages dashboard. At the top, there are two dropdown menus: 'All landing pages' and 'All campaigns'. Below these is a 'Show chart' button. The main part of the dashboard is a table with the following columns: Live, Chart, Name, Views, Subs., Subs. rate, New contacts, and Contacts rate. The table contains four rows of data, each with a green status indicator and a chart icon.

Live	Chart	Name	Views	Subs.	Subs. rate	New contacts	Contacts rate
●	📊	How to Make Marke...	40.3k	21.9k	54.5%	1,987	4.9%
●	📊	LinkedIn's New Co...	35.6k	21.2k	59.5%	1,486	4.2%
●	📊	47 Handy Facebook...	15.6k	9,045	57.8%	700	4.5%
●	📊	H3 - Dynamic Cont...	12.6k	7,666	61.1%	282	2.2%

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CHAPTER 2

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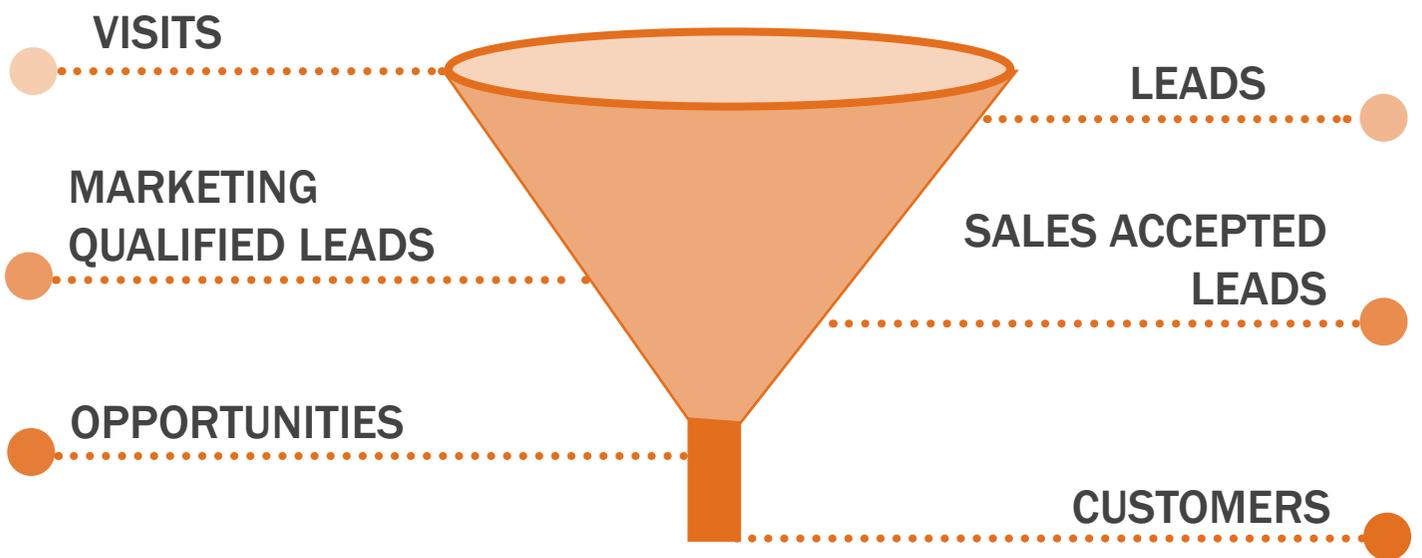
# HOW TO DEFINE YOUR FUNNEL STAGES



“Sales and marketing must have a unified picture of the funnel.”

Sales and marketing teams often have a very different picture of the funnel. They might disagree about the number of stages a lead passes through before becoming a customer – and they often use different terminology to describe those stages.

To adopt an effective Smarketing strategy, sales and marketing must have a unified picture of the funnel and standard definitions of each stage in the process. For example, HubSpot’s Smarketing team uses the following funnel stages:



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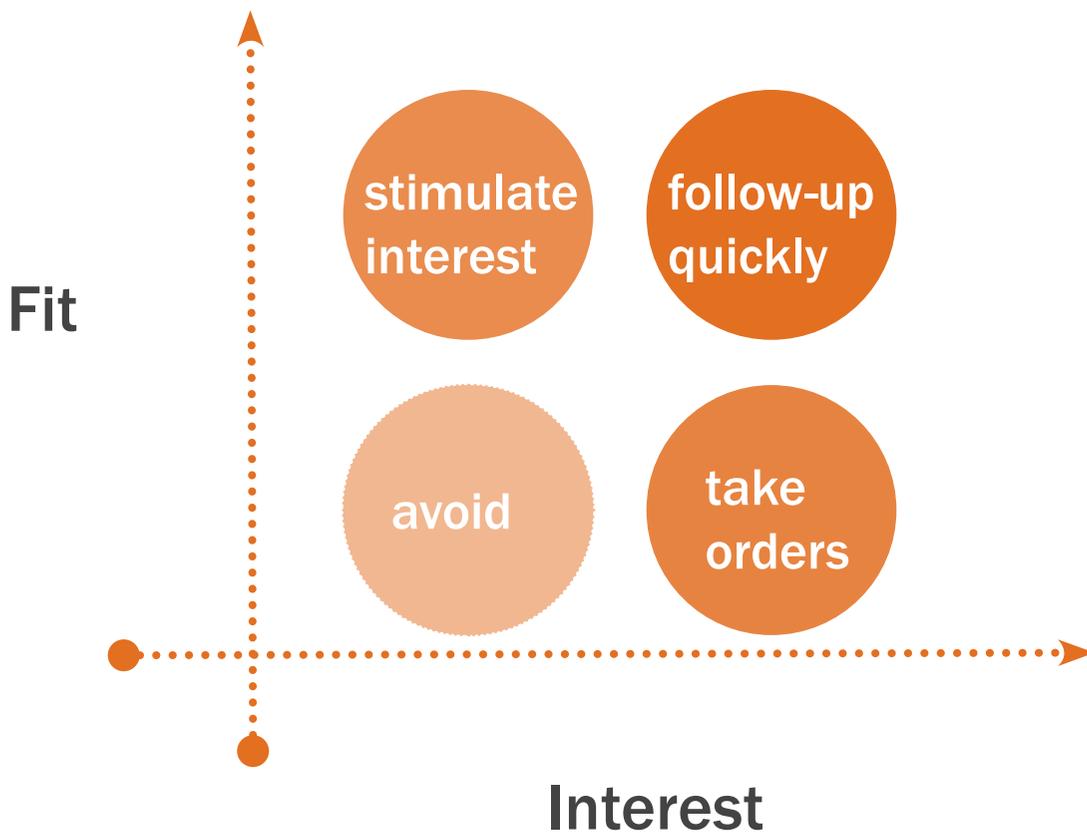




# Understand Lead Quality

Focus on the definition of a [Marketing Qualified Lead \(MQL\)](#). This is the crucial hand-off point between marketing and sales, so it's essential that the teams agree on the terminology.

Every company's definition of an MQL will vary, but it should reflect a combination of traits and actions that indicate a lead is both a good fit for your company and ready to talk to a salesperson. Here's one way to examine your funnel to assess lead quality and determine whether a lead is ready for sales follow-up:



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# Aspects of Lead Qualification

## 1

### IS THE LEAD A **GOOD FIT**?

Your company might target financial services companies with 5,000 or more employees, or small service businesses with fewer than 100 employees. Or, you may be only interested in manufacturing companies of any size. Within those categories, you also might identify individual lead profiles, such as title or job description and role in the decision-making process – e.g., economic buyer, end user, influencer.

How closely a lead hews to your ideal customer profile will determine whether and when you hand it over to the sales team.

## 2

### IS THE LEAD **INTERESTED**?

A lead's activity can reveal how close they are to a buying decision. For example, if a lead has only visited your website once, or has just begun following you on Twitter, they may be aware of your company but aren't particularly engaged yet. A lead that requests a demo or views pricing information is showing a lot more interest.

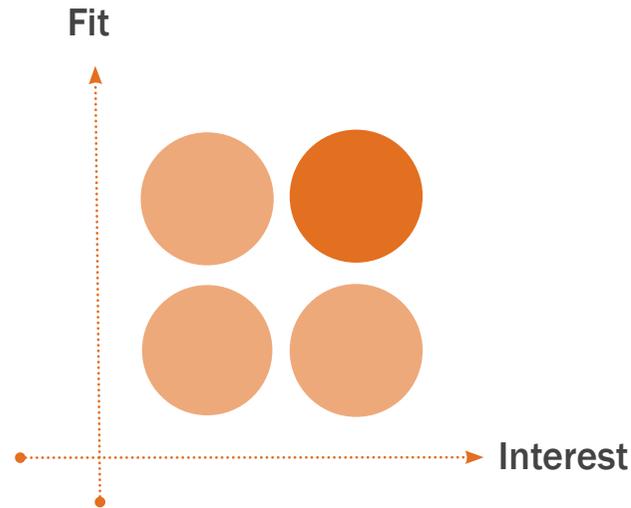
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Where a lead falls within the four quadrants of this matrix dictates the next step your marketing or sales team should take. For example:

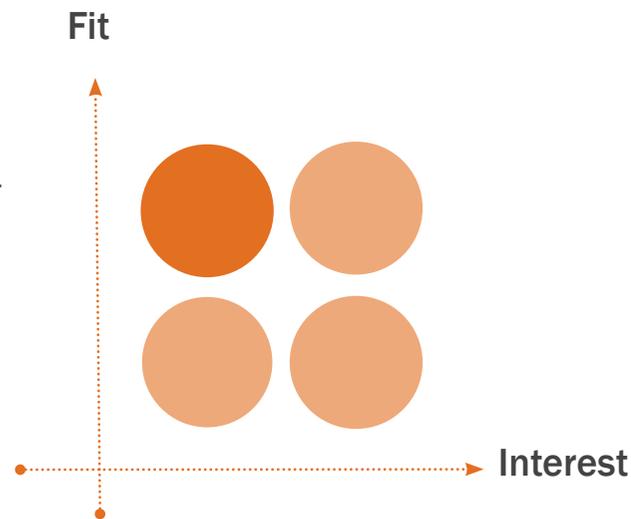
**GOOD FIT & INTERESTED**

Leads in upper right quadrant are a good fit for your company and are highly engaged with your marketing. These are hot leads that require immediate follow-up from your sales team – usually in less than 24 hours.



**GOOD FIT BUT LESS INTEREST**

Leads in the upper left quadrant are a good fit for your company, but don't show a lot of interest yet. Perhaps they've only signed up for an email newsletter or downloaded one piece of educational content. These are leads that the marketing team needs to nurture.

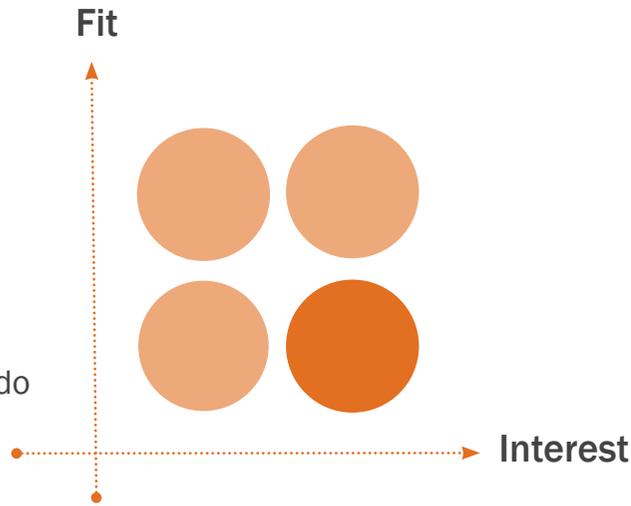


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### LOTS OF INTEREST BUT NOT A GOOD FIT

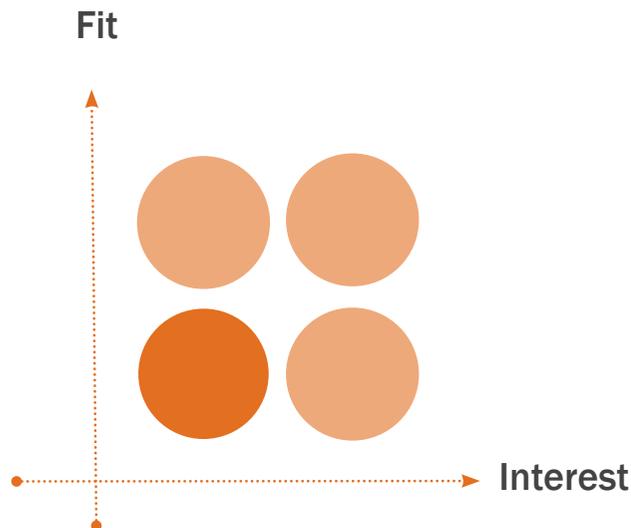
Leads in the lower right don't necessarily fit your ideal customer profile, but are highly engaged with your brand. They might have subscribed to your blog and email newsletter, downloaded your ebooks, and attended your webinars. It's worth having a sales rep do a low-cost follow-up with these fans to see if there's an easy sale to make from a non-traditional customer.



Sometimes leads that don't seem like a fit have a good reason to buy your product. They can also turn into great evangelists for your products or services, thus providing you with indirect support as non-customers. That's why you can't automate the entire sales and marketing process. At some point, a good marketer or sales rep can spot an opportunity that your systems might overlook.

### LITTLE INTEREST & NO FIT

Leads in the lower left quadrant aren't a good fit for your company and haven't shown much interest in your marketing content. They're definitely not worth a sales rep's time. Don't be afraid to take them out of your communication stream.



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## Develop Your Definition of an MQL

Using this matrix as your guide, develop an MQL definition based on the combination of fit and interest that's right for your company. Some marketers may focus more on fit because they have a tightly defined market; other marketers may have a broad customer base and focus more on interest level. That decision depends on your business model.

MQL definitions in those two cases might look like this:

A contact with XYZ title or role who has filled out a landing page form and works at a financial services company in the U.S. with more than 5,000 employees.



A contact with the ABC title or role who has requested a product demonstration from a sales rep and works at any U.S.-based company.



Whichever approach you chose, base your definitions on data – not on gut instinct. Even experienced marketers and salespeople can be way off base in their assumptions about what makes a good lead.

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# Example of Lead Scoring

Here is an example of what [lead scoring](#) can look like for you:

The screenshot shows a lead scoring configuration interface with three rules. Each rule consists of a field name, a comparison operator, a value, and a rule value.

Field	Operator	Value	Rule Value
Number of Pageviews	is greater than	15	10
Email	contains the word	gmail	-10
Company Name	contains the word	IBM	30

Using a lead scoring or lead grading program that relies on data from your closed-loop analysis can help you determine the importance of different activities.

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# How You Can Do It

## ..... EXAMINE BEHAVIORAL HISTORY

Examine the activity history of recent customers and analyze how many actions they took before becoming a customer – i.e., the number of page views or number of conversions, such as downloading a report or registering for a webinar, etc.

## ..... FIND PATTERNS

Look for patterns that indicate a lead's likelihood of closing. For example, if a lead that downloads ten pieces of content from your website or visits your site more than 15 times in one month, she is more likely to close. Consider incorporating frequency measures in your MQL definition.

## ..... LIST ACTIVITIES

Also, list all the activities that a lead can take before becoming a customer, and analyze the close rate for each one.

For example, to determine the close rate for a webinar, look at all customers that had watched a webinar, then divide that number by the total number of leads that originally registered for the webinar. That gives you the close rate for leads from that particular event.

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## ●..... CALCULATE CLOSE RATES

Using the close rates for individual actions, calculate the average close rate for all your marketing activities. Then look for actions that have a significantly higher close rate. For example, if your average close rate is around 1%, you might find a handful of actions that have a 3%-5% close rate.



Add these top-closing events to your definition of an MQL. Any lead that engages in at least one of these activities, and is a good fit for your company, would be considered an MQL. Use those close rates to decide what score to give different activities in your lead scoring or lead grading system.

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CHAPTER 3

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# IMPLEMENTING A SERVICE- LEVEL AGREEMENT (SLA)



“ *The service-level agreement (SLA) is a two-way process between sales and marketing.* ”

The MQL definition is the centerpiece of another critical Smarketing strategy: implementing a service-level agreement (SLA) between sales and marketing.



The SLA formalizes the commitment that the sales and marketing teams make to meet shared goals for revenue growth. It's a two-way process:

The marketing team commits to delivering a certain quantity and quality of leads each month or quarter to help the sales team meet its quota. The sales team then commits to follow up on those leads in a timely manner, and to make a specific number of contact attempts before abandoning the lead.

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To set up the SLA for the marketing team, start by asking these questions:

- ..... How many quality leads does the sales team need to make quota?
- ..... What percentage of those leads is created by marketing? Your sales team may be doing some of its own prospecting, and therefore the marketing team isn't responsible for 100% of the leads needed to make quota.
- ..... What percentage of those leads is influenced by marketing?  
Even if the leads originate from another source, the marketing team may be required to nurture those leads until they are marketing qualified.



Once you've answered those questions for your company, compute the SLA based on the percentage of the pipeline that the marketing team needs to drive. But here's a tip to make the SLA even more convincing for your sales team: Base the SLA in the units that are most relevant to a sales person – dollar figures.



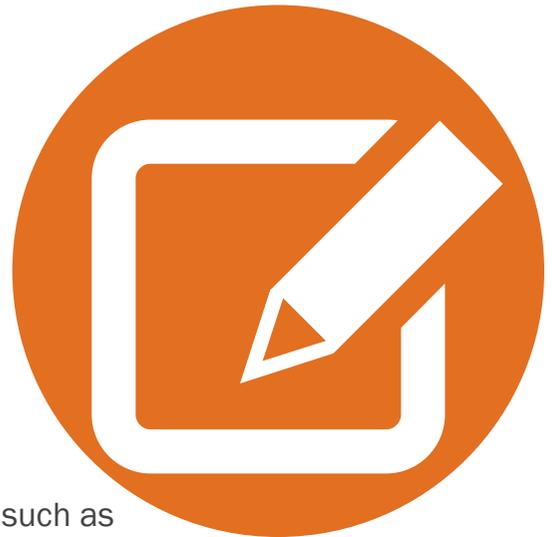
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# How to Calculate SLA in Dollar Value

To calculate an SLA in dollars, take the percentage of the sales quota that marketing is responsible for each month. Then, calculate the value of each MQL to determine how many leads marketing must deliver to reach that total. Here is how to calculate the value of an MQL:



1

Create a list of all campaigns or offers, such as webinars, demos and trade shows, which have generated leads in your pipeline. You also can segment your leads by type of customer, such as enterprise or mid-sized business.

2

Pull a list of recent customers and match them to the campaign or offer that generated their first visit or conversion. Then, calculate the average revenue per customer for each lead source. (If you're segmenting by type of customer, you can also calculate the average revenue per large vs. mid-sized or small customer.)

3

Look at the average close rate for each campaign or offer. Then, multiply the average revenue-per-customer for those campaigns/offers against the close rate to determine the average MQL value.

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For example, if the average revenue per customer from a lead that converted on a whitepaper is \$160,000 and the average close rate on those leads is 1%, the value for each whitepaper MQL is \$1,600.

<b>MQL Type</b>	<b>Average Revenue/ Customer</b>	<b>MQL to Cus- tomer Close %</b>	<b>Value per MQL</b>
<b>Whitepaper</b>	<b>\$160,000</b>	<b>1%</b>	<b>\$1,600</b>
<b>Webinar</b>	<b>\$100,000</b>	<b>1.5%</b>	<b>\$3,000</b>
<b>Online Demo</b>	<b>\$150,000</b>	<b>2%</b>	<b>\$3,000</b>
<b>Tradeshaw</b>	<b>\$125,000</b>	<b>1%</b>	<b>\$1,250</b>
<b>Contact Sales</b>	<b>\$110,000</b>	<b>10%</b>	<b>\$11,000</b>

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## Base Every Decision on Real Data

Once again, it's important to use data to determine the sales team's responsibilities. Take the question about the ideal number of contact attempts: even though your chances of successful connection increase each time you call a lead, those calls also have a cost associated with them: the sales rep's time. At some point, the potential return for making additional calls will diminish.



That's why you need to determine the optimal number of times to call a lead based on the profitability of that activity. Here's one way to find that optimal number:

1

### START WITH STALE LEADS

Select a portion of leads that had been in the sales pipeline for at least a few months.

2

### GROUP DATA

Look at your CRM records to determine how many times the sales team attempted to contact each of those leads before closing. Create cohorts of leads that were contacted once, twice, three times, four times, etc.

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# 3

## MAKE ESTIMATES

Estimate how much each contact attempt costs your sales team. You can do this by estimating how many hours a month a rep spends making calls and the average number of contact attempts he or she can make each hour. Then, determine the cost-per-call by dividing the average hourly cost of a sales rep's time by the average number of calls per hour.

# 4

## BENCHMARK

Benchmark the profitability of these contact efforts by dividing the average revenue for each customer by the cost of calling a lead once, twice, three times, etc.

# 5

## PLOT DATA

Plot that data in a chart that uses the number of contact attempts as the X axis and the profitability score as the Y axis. Because additional contact attempts tend to generate more sales, you should see a line that gradually rises in profitability with the number of attempts.

# 6

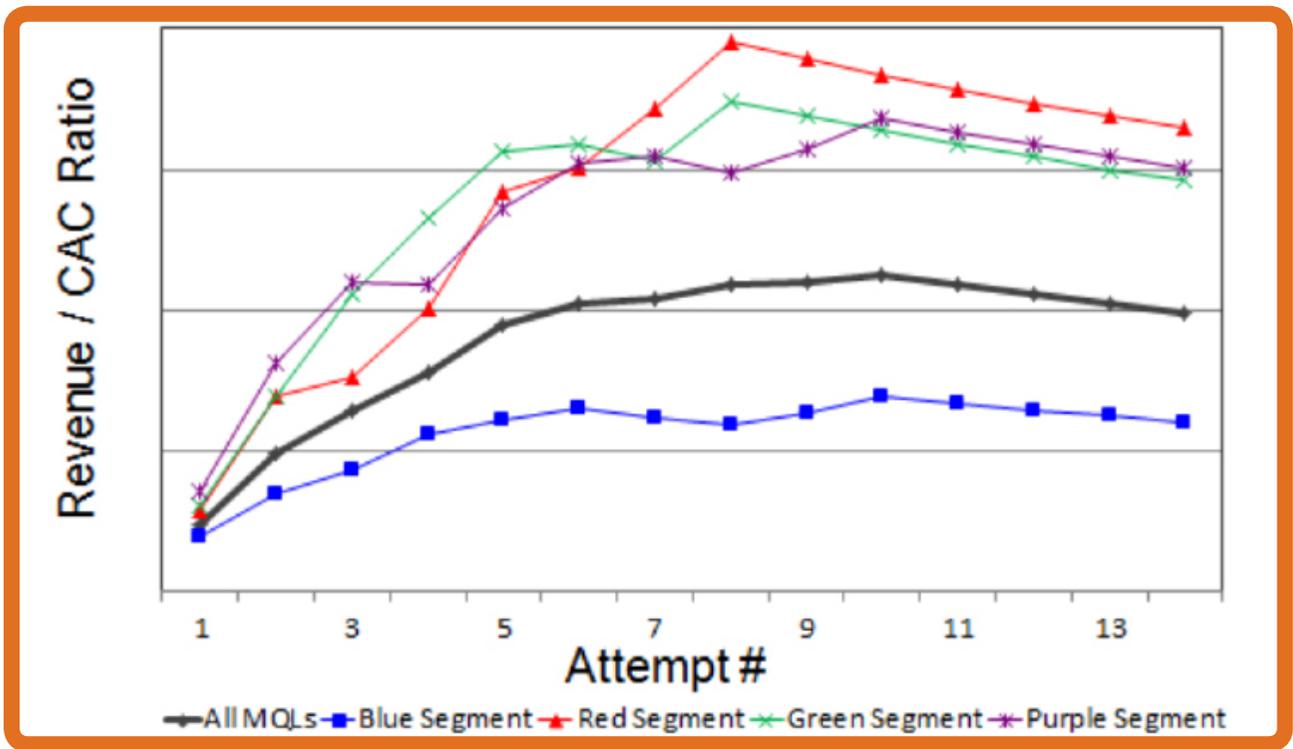
## NOTE RESULTS

Note where the lines level off – meaning the profit-per-customer isn't increasing despite the additional contact attempts. This leveling-off point is the recommended number of contact attempts to use in your SLA.

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Here’s an example of this type of analysis created by Mark Roberge, HubSpot’s SVP of Sales. The colored lines represent the results for different types of leads in the HubSpot sales funnel. As you can see, the benefits of additional contact attempts tend to level off around eight or nine contact attempts:



Based on those results, the sales SLA might require sales to make one follow-up attempt within four hours, with eight attempts in 14 days. Remind the sales team of their responsibilities by putting the SLA rules about contact times and follow-up attempts in your CRM system.

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CHAPTER 4

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# A DEEP DIVE INTO DASHBOARDS & REPORTING



“ *Failing to monitor progress is a common mistake - and it can be costly.* ”

After implementing the SLA, use the data from your [closed-loop reporting](#) system to track progress towards those goals. Failing to monitor progress is a common mistake made by companies with poor alignment between sales and marketing – and it can be costly. If you’re not keeping an eye on your goals, you’re less likely to spot areas of concern until they spiral into big problems. At that point it may be too late to do anything about it.



Manage your Smarketing organization with these two valuable tools:

●..... **DAILY DASHBOARDS**

●..... **DETAILED MONTHLY REPORTS OF SALES AND MARKETING ACTIVITY**

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# Dashboards

Sales and marketing dashboards turn data from your closed-loop reporting system into a daily snapshot of the team’s progress. Dashboards should be shared with the entire Smarketing team by building them into your CRM system, incorporating them into your marketing software platform, or emailing them to the entire team.

This highly public update not only tracks your progress toward goals, but it can also help your team meet their goals. Marketers and salespeople are less likely to fall behind if they know that the rest of the team will see their numbers every day. And if people do fall behind, they’re more motivated to fix problems on their own.



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# The Marketing Dashboard

This Marketing Dashboard, also known as the Daily Leads Waterfall Graph, is a simple but very effective way to visualize your marketing team’s progress toward its SLA goals. The graph compares your actual daily lead flow against the target rate that you need to hit your monthly goals.

Generating a Daily Leads Waterfall Graph is simple. [If you’re a HubSpot customer, your software does it automatically on your Dashboard.](#)



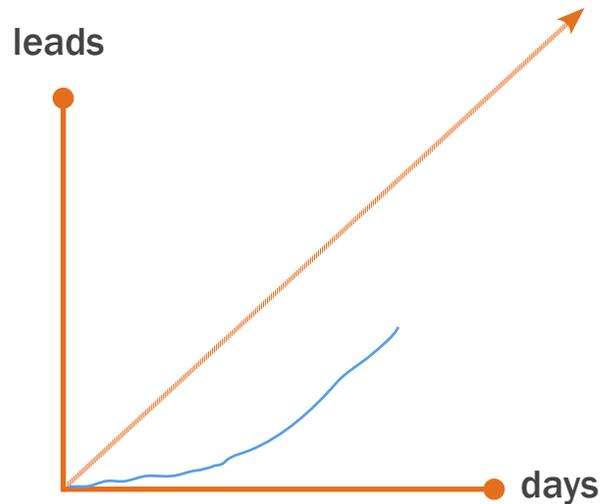
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If you're not a HubSpot Customer, [you can use this Excel template](#) to create and maintain your graph. Enter your results every day to plot your progress against the SLA goal. The resulting chart can show you where to focus your marketing team's attention.

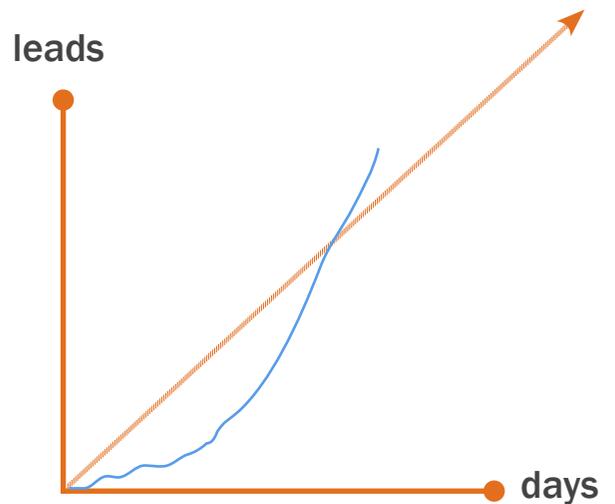
**..... IF LEADS ARE LOW**

If actual leads are below the goal, your marketing team must do additional work to deliver on its SLA promises. That might mean developing new content, increasing social media engagement, or spending additional money on PPC.



**..... IF LEADS ARE ON TRACK**

If actual leads are running above the goal, your marketing team has some breathing room and can look ahead to the next month or next quarter. For example, you could start working on next month's campaigns, or hold back a few pieces of content for next month's promotions.



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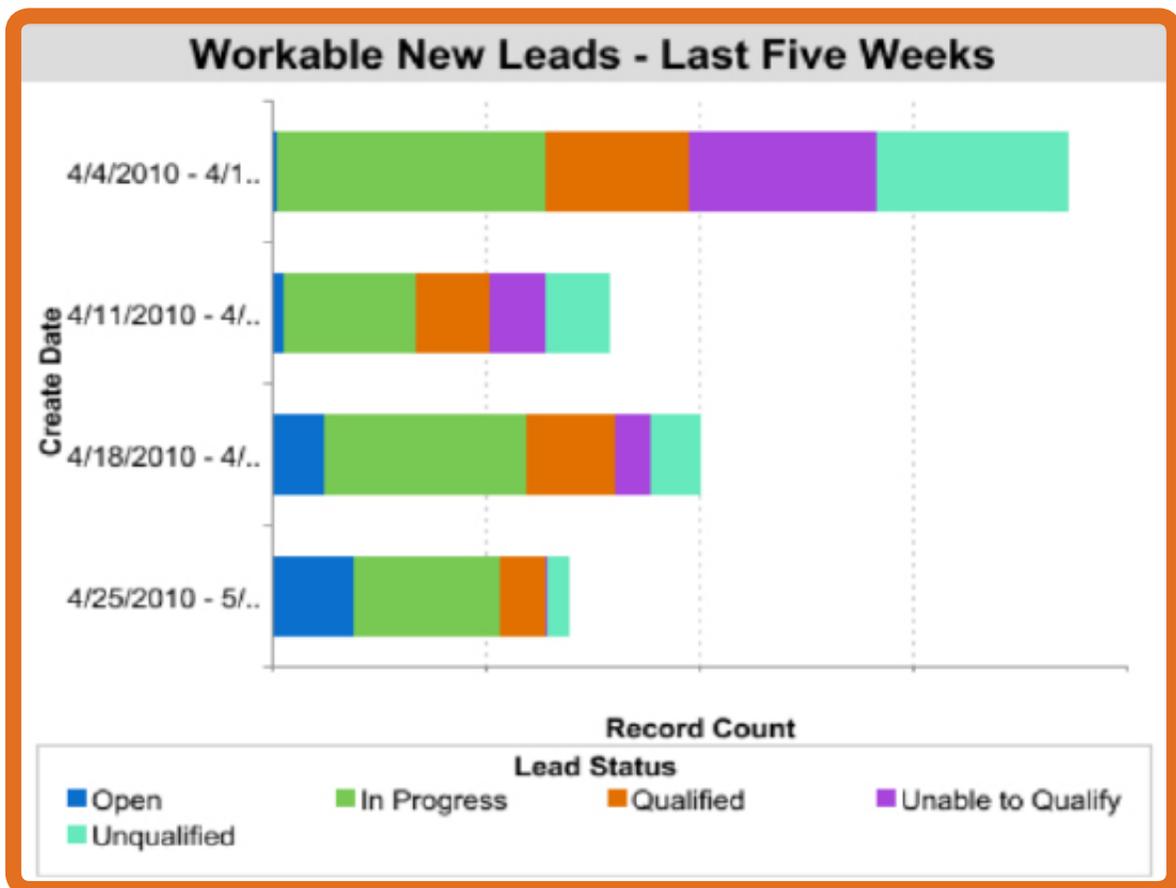


# Sales Dashboards

Sales dashboards generally measure follow-up timing and contact attempts. Have your sales manager dig into CRM data to create charts that illustrate whether the sales team is delivering on its SLA goals. Two key dashboards are:

- ..... New leads that were not called within XYZ hours, as specified in the SLA
- ..... All leads that weren't called at least XYZ times within XYZ days

These daily reports will show when specific teams or individual sales reps are falling behind on their goals. That early warning gives sales managers the chance to jump in, diagnose the problem, and provide some coaching that will help the team or the individual get back on track.





## Monthly Reports

Dashboards provide a daily update of the most important metrics for your Smarketing team.

But you should also create a monthly sales and marketing report that gives a detailed look into your sales and marketing strategies and results.

This monthly report should be shared with the entire company. It creates transparency about sales and marketing activities – but also highlights how your efforts are impacting the entire business. The monthly report should feature charts that quantify the work that sales and marketing does each day.



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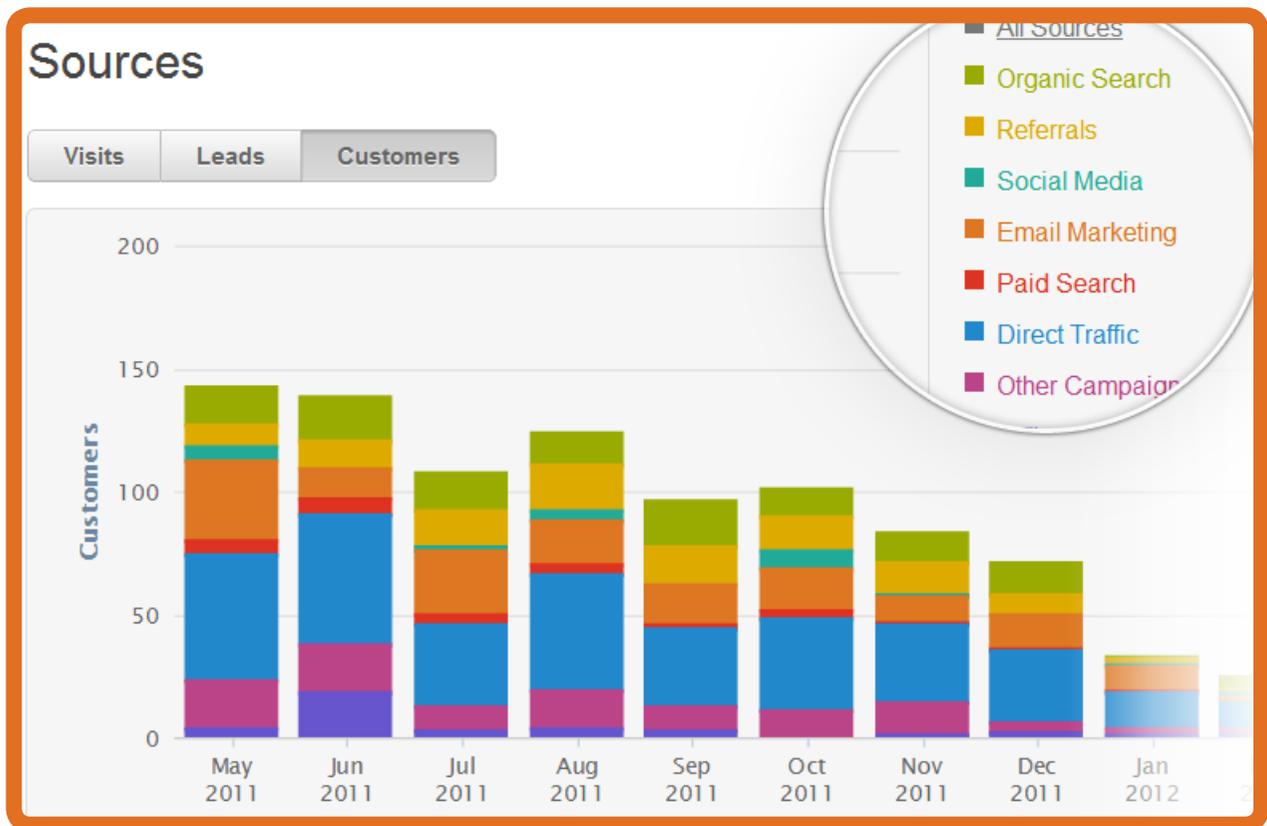


# Marketing Monthly Report

The marketing team’s report should illustrate the impact of its recent activities, using a range of charts, including:

## ..... VISITS, LEADS & CUSTOMERS BY SOURCE

Show how your marketing channels have helped you attract visits, leads and customers. Compare different sources and evaluate which ones provide the most return on investment. Such insights will help you prioritize efforts in the future. Here is a [screenshot of these analytics the HubSpot software can give you access to:](#)



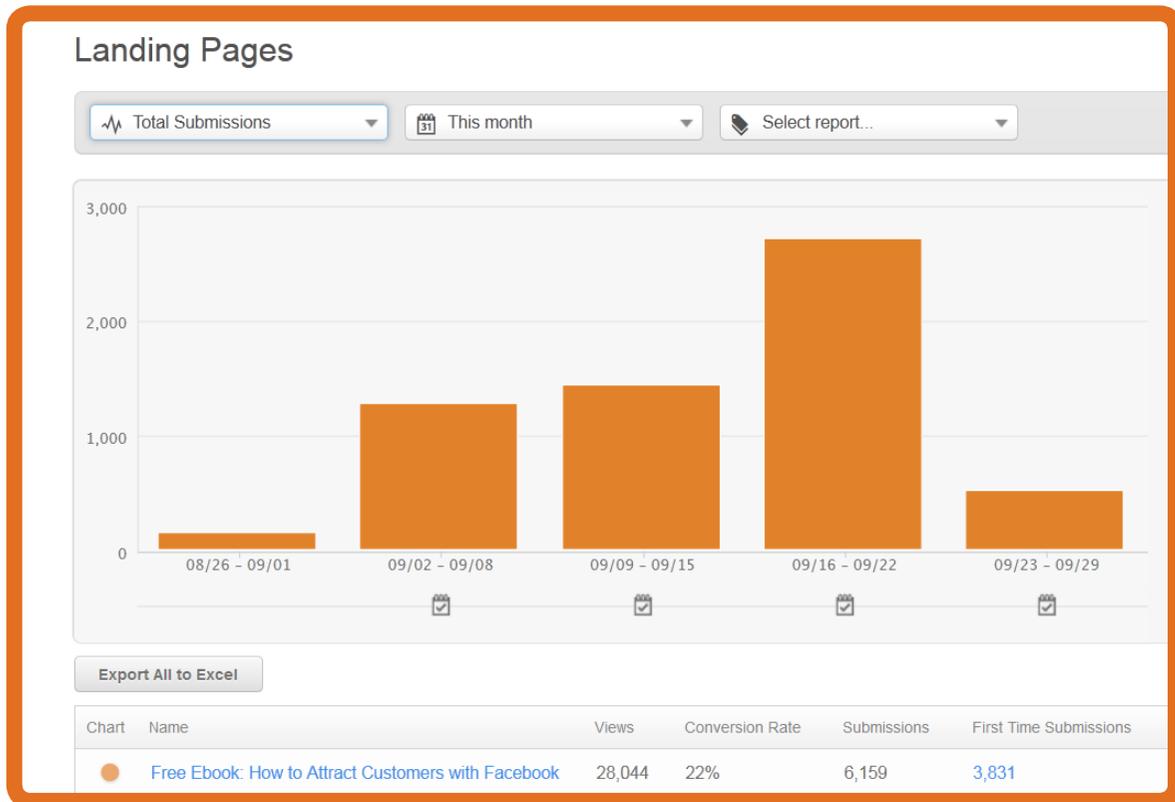
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..... PERFORMANCE OF MARKETING ASSETS

Next, look at how your marketing assets--web pages, landing pages, and calls-to-action--are performing. These are the assets your various marketing channels use in order to be successful. In fact, they are the substance of what your sources use to generate more traffic, leads and customers.

In order to evaluate how these assets are performing on a monthly basis, review the conversion rates of your landing pages and calls-to-action. [Here is an example of what these analytics look like through the HubSpot software:](#)



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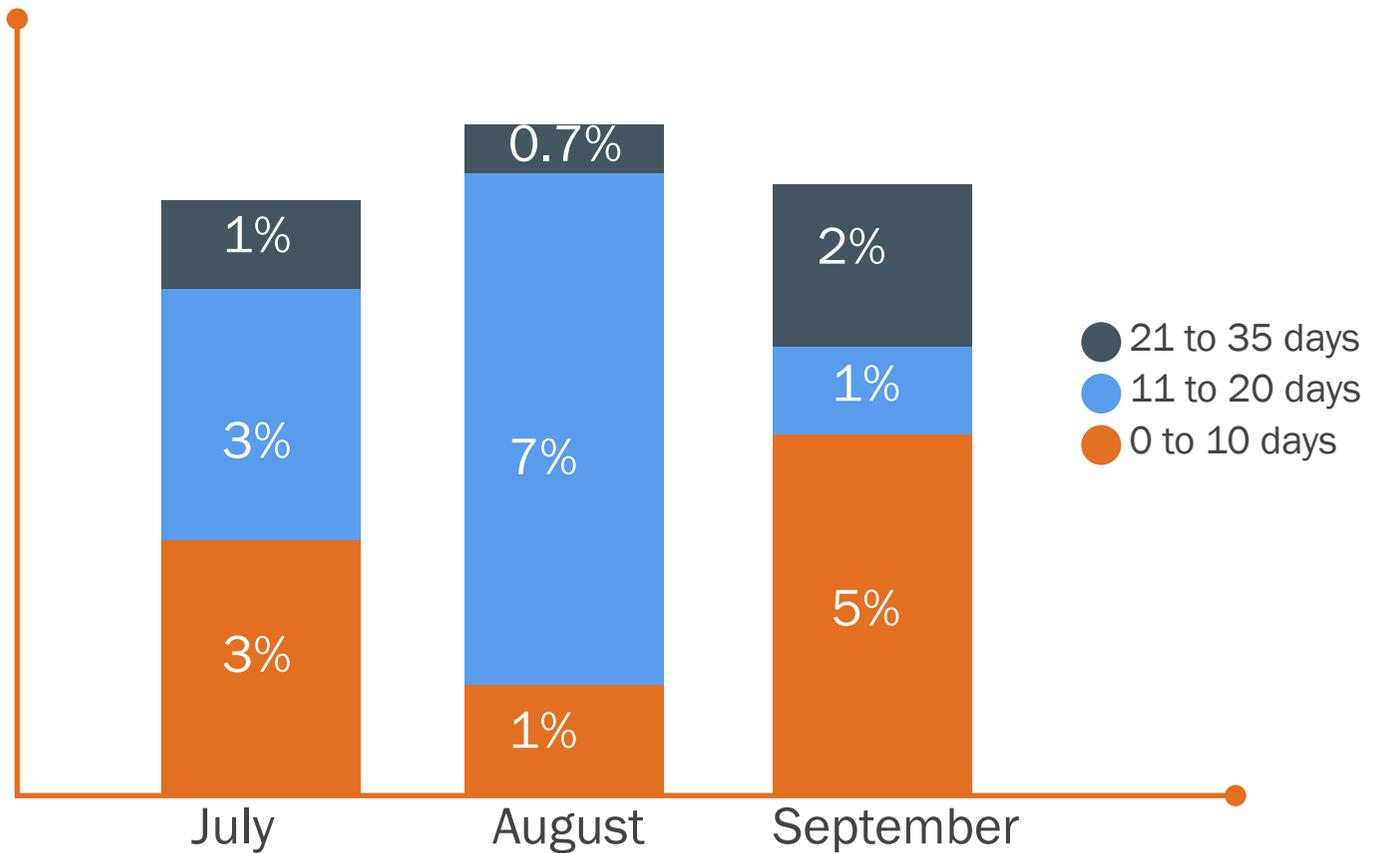




..... SPEED FROM CONVERSION EVENT TO SALES FOLLOW-UP

If you are a B2B marketer, you should also be aware of how long it takes for a sales person to follow up with a lead. That will give you an idea of how you can speed up the “demo worked” process by creating more high-quality leads and/or ensuring that your sales team is contacting the leads fast enough.

Here is what that chart might look like:



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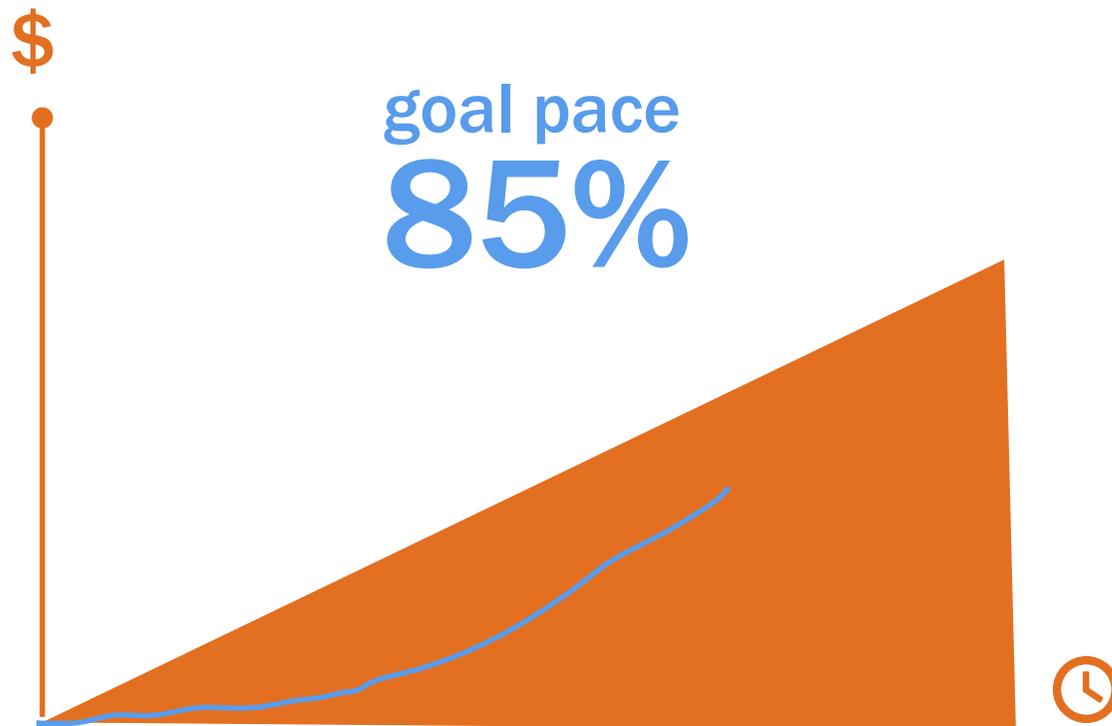


# Sales Monthly Reporting

The sales team's monthly report should feature charts that show what's being done with the leads that marketing is generating.

## ..... SALES WATERFALL CHART

The most important chart look at there is a visualization of actual sales results vs. quota. The chart should show the percentage of the goal that was reached and if there was a gap between the quotas and the monthly goal. Here is what this chart can look like:



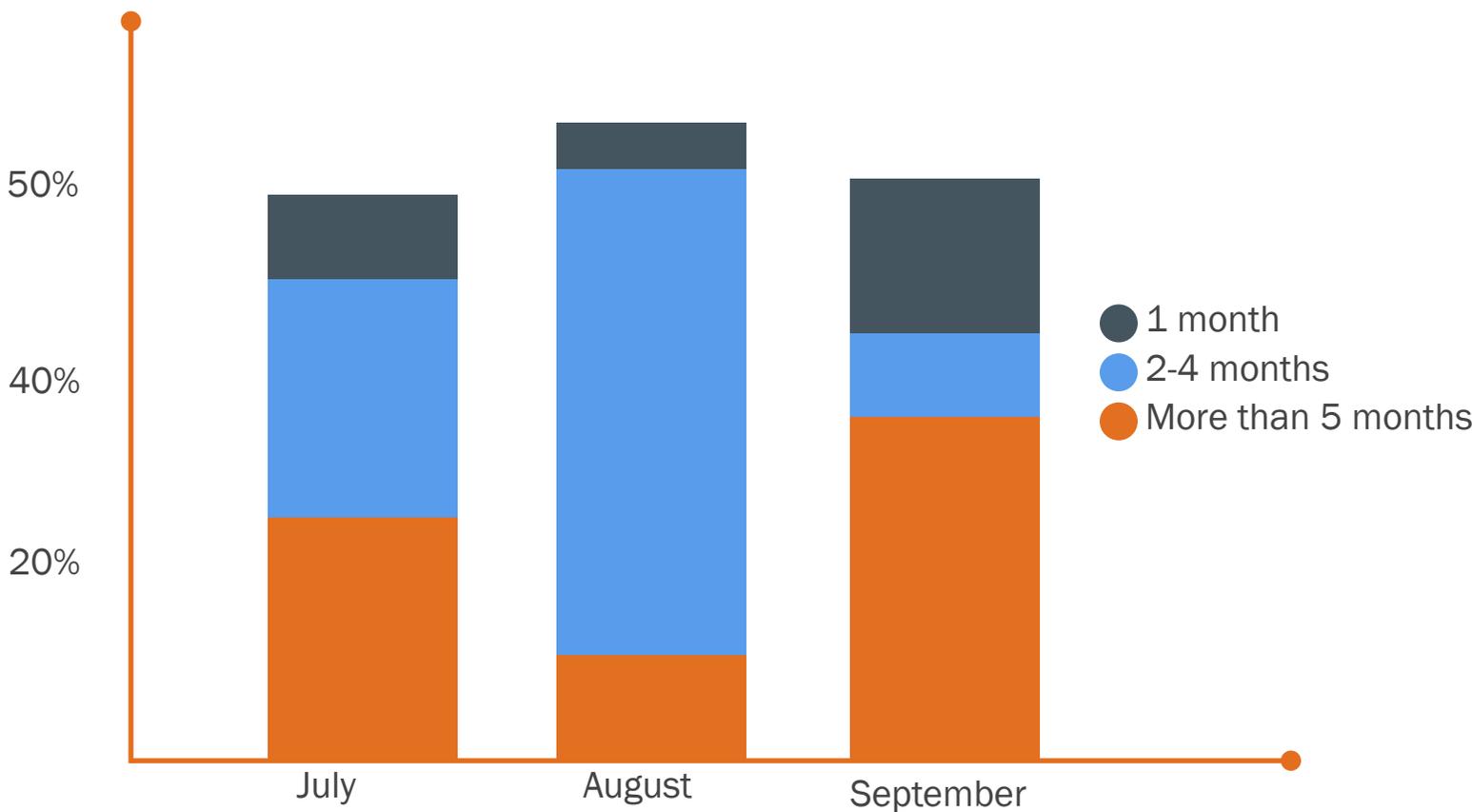
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● TOTAL SALES CYCLE

It's also important to keep track of how long it takes your sales organization to convert the leads that marketing generated into customers. Monitoring this view will give you a sense of your sales cycle and if you are ever below or above average. Whenever you do nonstandard marketing initiatives, keep a close eye on this chart because it will give you insights into the performance of your efforts from a sales perspective. This view is also tremendously helpful when you slice it across different target personas. If you are targeting customers with different needs and preferences, you might notice that their sales cycle is drastically different.



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CHAPTER 5

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# HOW TO HOLD EFFECTIVE SMARTKETING MEETINGS



“Regular meetings foster communication and collaboration.”

Another way to get sales and marketing to think like one Smarketing team is to let those two groups actually get together and interact in person. Regular meetings between the two groups foster communication and collaboration, and help sales and marketing managers improve their Smarketing tactics.



You should hold two types of meetings:

- ..... A weekly all-hands Smarketing meeting
- ..... A monthly management meeting

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# Weekly Smarketing Meeting

Get the entire Smarketing team together at least once a week to discuss recent results and upcoming activities. The size of your organization will determine the format of this weekly meeting.

For a company with only a handful of sales and marketing staffers, the Smarketing meeting can be a highly interactive session, welcoming discussion and questions from anyone in the group.

But for a larger company with dozens of marketing and sales staff, the Smarketing meeting should be a fast-paced, high-level overview to keep sales and marketing teams on the same page and moving toward the SLA goals.



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## Tips for Running Meetings

Since HubSpot now has more than 100 people at its weekly Smarketing meetings, we take the latter approach. Here are our recommendations for running a similar Smarketing meeting:



### ..... KEEP IT SHORT

It'll b best if you can keep Smarketing meetings short and to-the-point. If you can keep it to 30-40 minutes, that will be great. Just make sure it doesn't go over an hour.

### ..... PICK TIMING CAREFULLY

Hold it at the end of day to avoid disrupting the sales team's prime calling time.

### ..... PICK PRESENTERS

Designate one presenter each from Sales and Marketing to deliver their half of the Smarketing update. That update should include current status toward SLA goals, plans for upcoming activities, recent highlights or big wins, and so on.

Think of it more as a performance than a dry presentation of charts and metrics.

Look for presenters who can entertain and energize the group while quickly conveying the most important quantitative details.

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# Monthly Management Meetings

The monthly management meeting is an opportunity to take a deep dive into results and to hash out upcoming plans, strategy questions, and any potential problems that may be nudging your sales and marketing teams out of alignment.

Invite three to five key managers from the sales and marketing teams to the monthly meeting, and empower them to work on the issues that affect sales and marketing alignment. In this way, they will forge solid relationships that will help your Smarketing organization scale as you company grows.



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# Suggested Agenda Items

Agenda items for the monthly management meeting include:

- ..... **REVIEW OF METRICS**  
Detailed discussion of closed-loop analysis reports and current funnel metrics, so sales and marketing can address any issues related to meeting the requirements of the SLA.
- ..... **FUTURE PLANS**  
Sharing plans for future marketing or sales projects, and discussion of potential strategy changes.
- ..... **DISCUSSION ITEMS**  
Resolving disputes between sales and marketing about lead quality or quantity, sales follow-up efforts, the definition of the MQL, or any other important terminology or practices.



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CHAPTER 6

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# IDEAS ON OTHER SMARTETING COMMUNI- CATION



“ *Marketers should think about the sales team as another customer base.* ”

Even with an SLA in place, and dashboards and meetings to provide regular updates, marketers still might need other ways to show the sales team how their efforts are helping achieve revenue goals.

In other words, marketers should think about the sales team as another customer base, and try to “market” the role of marketing to that internal audience.

As with any marketing campaign, it helps to tailor your message to the audience’s persona. In the case of the typical salesperson, that’s someone who’s super busy, doesn’t want to be distracted, doesn’t want to read long reports, and needs to know how the information you’re sharing will help them right now.



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# Types of Communication

Consolidate the information you need to convey to the sales team into simple, weekly newsletter-style reports intended to help them do their job. At HubSpot, for instance, we use two weekly reports:

## WEEKLY MARKETING UPDATE

Weekly marketing updates can consist of a list of weekly planned promotions with short soundbites. This information helps the sales team understand where new leads are coming from, so they can prepare for those contacts.



Hey HubSpotter!

Hope you are ready for an eventful week because Marketing is bringing some unbelievably good offers to you:

### Ebooks

- [An Introduction to Closed-Loop Marketing](#) | [TY page](#) | [Share on LI](#) | [Share on FB](#)  
**Soundbite:** The ability to tie every customer back to the marketing initiative that created them is empowering. Download our new ebook on closed-loop marketing and learn how your business can measure marketing campaigns down to the dollar. Once you review this introduction, I can show you how to use the HubSpot software to close the loop between your marketing efforts and revenue.

*This offer is paired with an [#inboundchat](#) on Tuesday, April at 3pm. Invite your prospects to discuss how to close the loop between marketing and sales.*

### Webinar

- [Facebook for Business: 4 Steps to Success \[Workshop\]](#) | [Share on LI](#) | [Share on FB](#)  
**Soundbite:** Did you hear the news? HubSpot is hosting an exclusive workshop with Facebook.com! Chris Luo, the Head of Global SMB Marketing at Facebook, will join HubSpot's VP of Marketing, Jeanne Hopkins, to discuss Facebook's 4-step methodology to business success. We are expecting 10K registrants at the event, so don't miss out!

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●..... WEEKLY PRODUCT UPDATE

If your product or service change often, consider informing your sales team about these changes. Send these weekly email updates from your email marketing platform, so you can track open and clickthrough rates. You'll see which sales reps are reading the updates and which ones are ignoring them. And if you notice overall opens and CTR declining, you know it's time to refresh the newsletter format or tweak information you're sharing to make the report more valuable to the sales team.

## Reshuffle Desks

Finally, you can encourage better communication within your Smarketing team by mixing sales and marketing desks together. By sitting next to each other, marketers get to see firsthand how salespeople do their jobs – and whether marketing activities are actually helping them.

Sales reps benefit by having a neighbor they can reach out to with questions about particular leads, or about new marketing campaigns. These informal conversations go a long way toward keeping the entire team happy and productive.



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# CONCLUSION & ADDITIONAL RESOURCES



“ *Always look for opportunities to modify core elements of your Smarketing strategy.* ”

One of the best things about this Smarketing framework is that it's scalable. You can tweak elements such as your SLA or the definition of a marketing qualified lead to reflect inevitable changes in your sales and marketing strategy as your company grows.

Always be on the lookout for opportunities to modify the core elements of your Smarketing strategy. For instance, you can develop new reports or filters to generate actionable data that helps your sales and marketing teams. Feel free to adapt your funnel description and MQL definition to reflect changes in your marketing strategy, customer base and products or services.



You can also revise your SLA to reflect changes in market conditions, customer needs, or the size of the sales staff and marketing staff to ensure that goals are realistic, but aggressive enough to drive revenue and profit growth.

Weekly Smarketing meetings can also change to match the size of your organization. Invite new managers or other key personnel to the monthly management meeting if your company grows significantly.

Ideally, tracking closed-loop data and holding monthly management meetings will uncover evidence of a growing disconnect between sales and marketing before the system breaks down completely. As you get more comfortable using data to manage your Smarketing team, you'll find new ways to optimize your campaigns, improve your sales follow-up and generate more revenue – which is the best way to keep everyone in the company happy.



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## Additional Resources

Here are some more resources about sales and marketing that you might find helpful:



Free, intermediate-level HubSpot webinar and ebook on aligning sales and marketing: <http://www.hubspot.com/All-You-Need-to-Know-about-Aligning-Sales-and-Marketing/>



Aberdeen Group study on the impact of sales and marketing alignment: <http://www.aberdeen.com/press/details/sales-and-marketing-alignment-collaboration-cooperation-peak-performance/76.aspx>



HubSpot blog post on achieving revenue disruption through Smarketing: <http://blog.hubspot.com/blog/tabid/6307/bid/30764/Achieving-Revenue-Disruption-Through-SMarketing.aspx>



HubSpot blog post on closed-loop marketing: <http://blog.hubspot.com/blog/tabid/6307/bid/32341/How-Closed-Loop-Marketing-Works.aspx>

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HubSpot blog post on defining a marketing qualified lead:

<http://blog.hubspot.com/blog/tabid/6307/bid/30889/How-to-Expose-the-Best-Leads-to-Your-Sales-Team.aspx>



HubSpot blog post on tracking SLA goals:

<http://blog.hubspot.com/blog/tabid/6307/bid/31902/How-to-Calculate-Track-a-Leads-Goal-That-Sales-Supports.aspx>



HubSpot blog post on creating a daily leads waterfall graph:

<http://blog.hubspot.com/blog/tabid/6307/bid/14222/The-One-Graph-Marketers-Should-Update-Daily-The-Leads-Waterfall.aspx>



HubSpot blog post on essential charts for a monthly marketing report:

<http://blog.hubspot.com/blog/tabid/6307/bid/31012/The-7-Slides-You-Need-for-an-Epic-Monthly-Marketing-Report.aspx>

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