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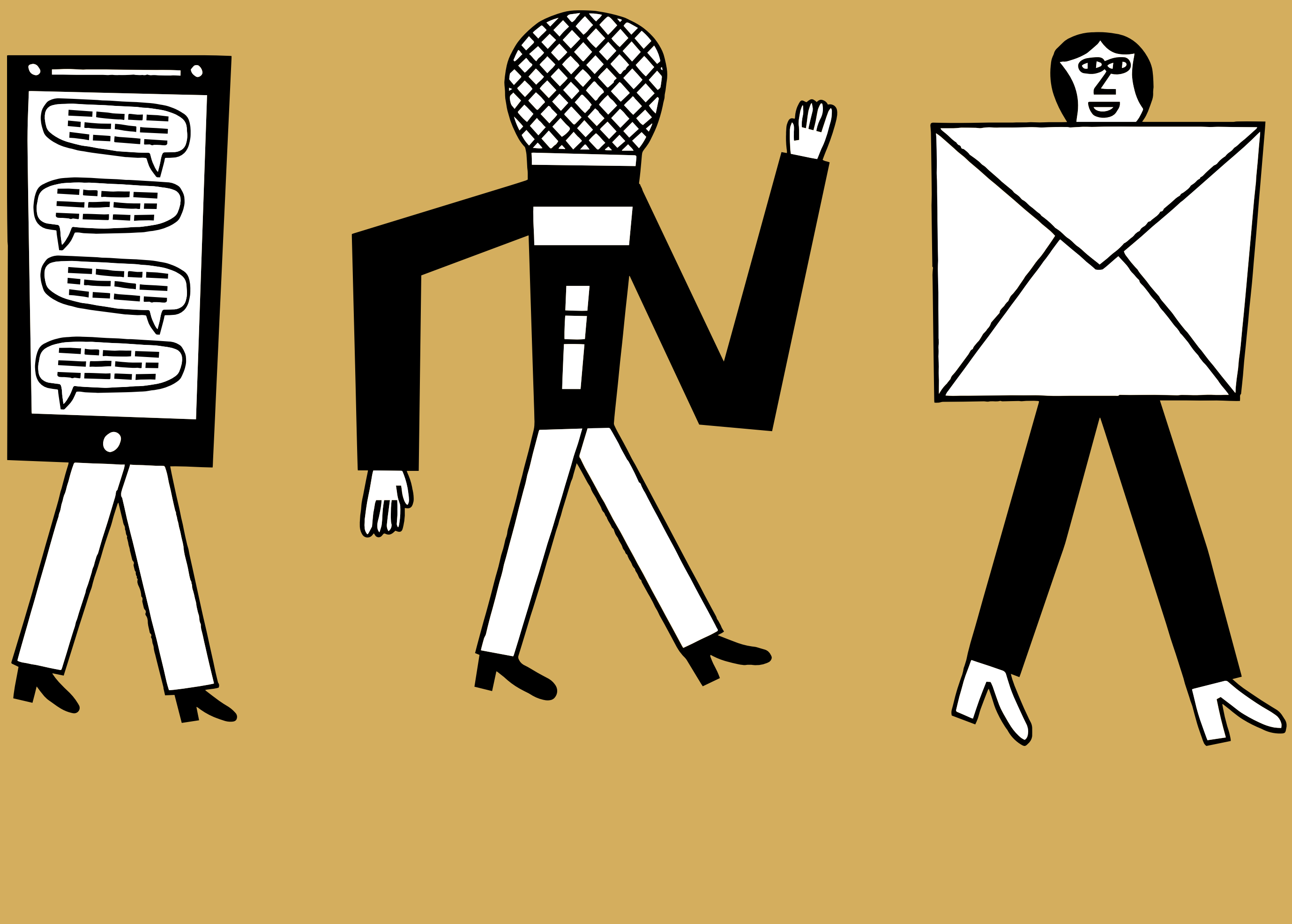
The Sales, Marketing, & Support Alignment Handbook



Contents

Connect the roles of sales, marketing, & support

Sales, marketing, and support — three distinctly different departments that can't exist without each other. Too often, however, they operate as individual organizations rather than connected entities, misaligned in their roles, goals, and expectations.

Ideally, the connection between marketing, sales, and customer support should be a continuous, looping relationship that serves to delight the customer. Marketing should meet regularly with sales, discussing what materials customers respond to and what else is needed to generate quality leads. Sales then takes these leads and continues the conversation. They build a strong relationship with the customer and find out their concerns/wants/needs.

Once customer deals are closed, the relationship continues with customer support, which solves product/service problems. When customers are satisfied with the product/service, the relationship goes back to marketing, which shares resources, and then to sales, which has the opportunity to upsell.

This connected relationship provides significant benefits:

The reality is that sales, marketing, and support are typically disconnected.

- High-quality leads from marketing to sales
- Better content creation based on feedback from support and sales
- New leads and opportunities from support conversations for sales
- Prioritized support for big customers and hot prospects
- Streamlined processes across departments

But the reality is that sales, marketing, and support are typically disconnected. Each department is focused on their own goals, budgets, and responsibilities. They become frustrated with each other when expectations aren't met.

The customer is then the one who suffers, as their journey throughout the departments is not consistent. Revenue can decrease as a result.

The role of each department

To truly interlink departments, an understanding of processes and tasks is needed. Let's break down the responsibilities of sales, marketing, and support and their end goals to understand where the disconnect occurs.

SALES

- **Role:** Participate in sales forecasting, pipeline management, prospecting, negotiating, closing, etc.
- **End goal:** Turn leads into customers. Also find upsell opportunities.

MARKETING

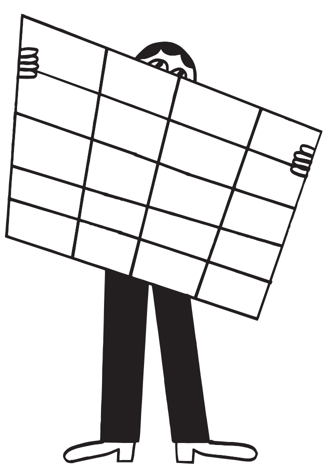
- **Role:** Establish and manage marketing initiatives such as content marketing, branding, email campaigns, networking events, and sales enablement material.
- **End goal:** Establish brand identity and attract new customers to the company.

CUSTOMER SUPPORT

- **Role:** Answer customer concerns and provide solutions to customers' problems.
- **End goal:** Provide an amazing customer experience and retain current customers.

End goals actually converge at customer attainment, retainment, and experience improvement. But sales/marketing/support often miss this fact — they are more like enemies than colleagues. Failure to meet their own departmental goals can result in them blaming each other.

If sales fails to reach their quota for the quarter, they might blame marketing for the lack of qualified leads. Or if support has a number of unhappy customers, they might point fingers at sales for not sharing the discounts they promised certain customers. Without clear roles and expectations, these departments will be consistently disappointed in the other.



Common alignment obstacles

All three of these departments are focused on the customer, and yet they are often at odds with each other. Misaligned incentives, communication silos, and opposing views of the customer are three common reasons why.

METRICS AND KPIS

Metrics and key performance indicators can act as powerful incentives, driving negative outcomes and behaviors if not aligned properly with the overall company strategy.

Answer the following questions about your own company: What type of incentives and performance metrics are currently being used to measure employee success? Are they encouraging departments to work together or in competition with each other?

Here are common metrics that push these departments to achieve their own goals rather than work towards common ones:

- **Sales metrics:** The number of calls made, the length of calls, the number of meetings set.
- **Marketing metrics:** Lead quantity, cost-per-lead, number of MQLs.
- **Support metrics:** Reducing the number of tickets, reducing the number of conversations, time to resolution.

Take note specifically of common sales and support metrics. Sales teams are incentivized to have conversations, while support teams are incentivized to end conversations. These misaligned incentives cause friction.

COMMUNICATION SILOS

Choosing the wrong metrics is closely connected to the lack of conversation among sales, marketing, and support. Departmental communication tools are not typically integrated. Sales works with a sales CRM, marketing with marketing automation software, and support with a support CRM. These are similar tools, but conversations are spread out across departments. This gap can result in missed opportunities or confused customers.

90%

of the content created for sales by marketing is never used by sales.

For example, a customer contacts a support representative to ask about an extension to their subscription plan. The support rep might be unsure which sales rep to contact and fails to forward the message. Sales then misses an upsell opportunity.

Similarly, marketing might create sales-enablement material from old customer information. Sales, based on previous customer conversations, is unable to use the material (in fact, 90% of the content created for sales by marketing is never used by sales). Marketing becomes frustrated that sales wasted their efforts, and sales is irritated that marketing doesn't understand their needs.

COMPETING CUSTOMER PERSONAS

Similarly, when sales, marketing, and support aren't communicating, customer personas can become misaligned. Departments can essentially be serving different types of customers and focusing on different company offerings if their views of the customers' needs/wants are not the same.

Let's say that marketing has a buyer persona for a specific customer segment — human resource coordinators of B2B finance startups. Marketing's efforts are focused on the HR coordinator's pain point — confusing hiring platforms. Sales and support, however, are focused on the lower budget that this audience has to work with.

Notice the disconnect? Based on customer conversations, sales and support realize that costs are a main concern of the target audience. Unaware of these conversations, marketing continues developing material that emphasizes hiring platforms — material that neither sales nor support can really use.

Create an organization plan (or alignment playbook)

Combat misalignment with a solid organization plan. First, determine how your teams will interact with each other in the present and future (interactions should be viewed as a loop rather than one transaction). Have open discussions with team leaders in sales, marketing, and customer service.

Common goals and strategies are crucial for alignment success. Define the overall connected strategy of sales, marketing, and support by answering the following questions:

- What are the challenges each department has concerning customers?
- What are the goals of each department and how do they align?
- What should each departmental role actually look like?
- What's the budget for each department?

Use these answers to write a document that outlines what alignment success looks like for your company, how departments can realistically work together, and (most importantly) common goals.

Once you have an organization plan in place, add sections that contain tactical ways your teams can build sustainable relationships with each other and your customers.

- **Mandate cross-team training.** Cross-team training helps sales, marketing, and support understand each other's underlying processes and provides much-needed context. Shadowing is one way to cross-team train — have team members spend a couple of hours in each other's departments observing processes and interactions.

- **Offer the right tools.** Too many sales teams and support teams are using silo'd tools. Implement a CRM system that tracks the entire customer experience. A customer relationship management system is beneficial to productivity, processes, and analytics.

- **Develop customer profiles and buyer personas.** Highly detailed and aligned customer personas ensure that all departments are working from the same customer page. Developing these personas should be a joint effort among sales/marketing/support. Interview customers and prospects. Outline their background, industry, interests, etc., and distribute throughout the departments. Discuss feedback and update regularly.

- **Align departmental incentives and metrics.** Come up with incentives that motivate departments to focus on the customer. For example, instead of pushing your sales team to primarily acquire new customers, emphasize adding value to current ones. Lifetime value (LTV) and average revenue per customer are two helpful metrics that encourage a better customer experience.

- **Overcome communication barriers.** Encourage face-to-face conversations between sales and customer service. Email is helpful, but an in-person conversation can build rapport and trust. Also, use a CRM system that tracks and shares every customer conversation.

Measure the results of your alignment efforts. Both customer surveys and internal surveys are excellent ways to determine if the customer experience is consistent and if sales/marketing/support are experiencing more efficient operations and communications.

Conclusion

Misunderstood roles and inaccurate expectations among sales, marketing, and support lead to inefficient operations, missed opportunities, and broken customer journeys. The customer relationship shouldn't be viewed as a handoff between departments. Instead, the roles and end goals of each department should be set up as a loop to meet one objective — adding consistency to the customer experience.

Implement cross-team training

Sales, marketing, and support are typically focused on their own responsibilities and meeting departmental goals. This tunnel vision often leads to little understanding (or even an interest) in what other departments are doing. Unfortunately, the lack of knowledge about each other can fracture relationships with the customer.

Cross-team training provides a complete view of company operations. This method is typically implemented by startups, as they have a smaller number of employees. Team members wear many hats and can switch to different roles. For example, marketing can act as sales, and support can assist with marketing.

A similar approach is possible at larger companies. Even if employees aren't performing activities outside of their own department, cross-team training provides an awareness of what other departments are doing and why. As a result, team members become more agile and efficient as they take knowledge about other departmental processes and update their own processes/approaches to fit accordingly. Other cross-team training benefits include:

- Improved customer journeys
- More communication and interactions
- Increased motivation and productivity

Cross-team training provides a complete view of company operations.

Take a support department at a large B2B company. If support understands sales customer conversations and marketing's branding efforts, the support team is more likely to offer a consistent, comparable customer experience with that of sales and marketing. Common goals, a synced onboarding process, cross-team meetings, and a shadowing program are all effective ways to cross-train your teams.

Establish common goals

Before jumping into a cross-team training program, ensure that sales, marketing, and support are aligned with their goals and strategies to avoid unmet expectations among departments.

For example, if one of your sales team goals is to achieve 25 upsells by the next quarter, but the support team is focused primarily on servicing new customers, your sales team is going to have a difficult time reaching their upsell goal. Similarly, if marketing has a goal of 300 MQLs per month, but sales needs 500 to reach their quota, departments are going to end each month frustrated.

Take the time to create common goals across departments so team members are working toward the same end. Best practices for goal alignment include:

- **Meet with managers.** Meet with sales, marketing, and support managers to share each department's goals and discover where your goals can intersect. What are you striving to achieve? How will the end goals benefit your company as a whole? What are reasonable compromises? Considering the upsell example above, maybe a common goal between sales and support could be 20 upsells (or 20 support conversations with qualified customers).

Writing down goals increases the chance of achieving them by **80%**

- **Write goals down.** Writing down goals increases the chance of achieving them by 80%. Also, write down action steps to achieve each goal and the specific activities each department will take to reach them. Record how you'll measure success and the timeline for each one.
- **Share with the team.** Goals will only be achieved if all teams are committed. Break down goals into organizational, team, and individual categories. Set deadlines on when goals need to be met (Lattice is a good tool for this) and track progress along the way. Meet on a regular basis with your own team members to provide feedback and with managers to discuss possible changes.

Determining aligned goals is a give-and-take. Find common ground, and make sure that every goal is mutually beneficial for each department.

Create an onboarding process

The first few weeks of a new hire's experience at your company are crucial. To ensure that each department is aware of the shared goals and management's expectations to meet them, implement a cross-training onboarding process.

Sales, marketing, and support should create a training plan and a schedule for new team members so that they are adequately introduced to the roles in each department. Seminars and 1:1 meetings with department managers are excellent options.

Just remember that new employees are already going to be learning a lot about their own specific roles. Make additional information about other departments as condensed as possible. During the first few weeks of an employee's onboarding, cover the following material:

Find common ground, and make sure that every goal is mutually beneficial for each department.

- **Departmental structure.** Explain the roles of each department and their responsibilities. These roles might be unique to your company, and new team members should be made aware. Also, share the hierarchical structure of each team. For example, who reports to who in marketing? In support? Who's the best contact for sharing leads?
- **Training material.** Outline what an average day looks like for each department. For example, give a summary of what most sales reps learn their first week on the job. What tools does your team use? Do you have a CRM? An email automation system? How does communication work peer to peer and rep to customer? What does customer care look like? Organize training material in online tools such as Tettra or Quip.
- **Processes.** Knowing how sales/marketing/support achieve their goals gives new team members valuable context. For example, if you're in sales, outline your sales strategy and explain things like ideal prospects, selling approach, customer personas, how opportunities are qualified, lead generation, etc. Or, if you're over the marketing department, provide info on what constitutes an MQL and how you source content ideas.

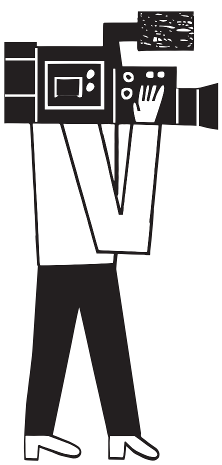
Sharing the above items are not only helpful for new employees — they're also beneficial for the presenter. As you (or other departmental leaders) offer information to newcomers about your processes and field questions, you might discover areas that need improvement!

Hold cross-team meetings

Assuming that your team members now have a solid understanding of cross-departmental activities, meet with sales, marketing, and support team members regularly to share updates on customers, initiatives, etc. These interactions give employees clarity on other departmental processes and the opportunity to offer their input.

Reiterate common goals at the beginning of each meeting to remind sales/marketing/support members that everyone is working toward the same goals.

- **Hold meetings once a month.** Organize a shared agenda with sales, marketing, and support managers before each meeting, and then send it out to team members. For example, you might discuss CRM updates and how it will affect all departments. Or you could share success stories, such as how the feedback from sales and support helped marketing create a successful email campaign. Rotate the meeting topics among sales, marketing, and support.



- **Host virtually or face-to-face.** Create a recurring meeting time and invite team members. Depending on the nature of your company, your sales team might be located on one coast while your marketing and support teams are situated on another. Tools such as Zoom or GoToMeeting make it simple to organize virtual meetings. If all teams are in the same location, head to the conference room. Whatever meeting method you choose, assign someone to take detailed notes during the meeting so any ideas or concerns can be acted on afterward.
- **Encourage participation.** Ask for questions and comments during these meetings. Make it interactive. Allow team members to share their progress and concerns. For example, a sales rep might mention that 50% of marketing's leads are not qualified. Use part of the meeting time to bounce around ideas on how the qualification process could be improved. And if team members are confused about certain strategies or processes, these meetings provide a time for clarification.

Another method is to have employees sit in on different departmental meetings. For example, if your sales team is holding a quarterly meeting to discuss hitting quota, ask marketing to sit in. Or if your support team is meeting to discuss issues with the customer onboarding process, invite sales reps join you.

Most importantly, make sure these meetings are worth your employees' time. Creating a clear agenda will help you stay on track and make the most of your time together.

Implement a shadowing program

In addition to frequent conversations and meetings, shadowing is an excellent method for approaching cross-team training. Sales, marketing, and support can all implement a "rep for a day" initiative where team members learn new skills and gain context in their colleagues' operations.

Rather than simply giving a lunch-and-learn or presentation, job shadowing offers a hands-on way to learn how different reps represent the company and its products/services to potential customers, as well as the pains and shortcomings of each department.

All parties mutually benefit from job shadowing. Team building, new skill development, and a stronger understanding of the customer are specific employee benefits. Departmental benefits include:

- **Identifying content opportunities.** By sitting in on sales calls, the marketing team might realize that important sales-enablement content (i.e., case studies, blogs, white papers) needs to be created or that some materials are not even being used. Or by listening to customer support calls, sales might discover that they are giving inaccurate information to new customers.

Sales, support, and marketing can benefit from learning the language used by the other departments.

- **Aligning language.** Sales, support, and marketing can benefit from learning the language used by the other departments. How does each department talk with customers? How do they explain the product/service? Marketing can incorporate sales terms in content and campaigns, while customer support can use sales language in everyday conversations. Sales can use customer success stories from marketing and support in their pitches and presentations.

- **Syncing overall brand image.** What kind of image is being projected by sales? Does it align with the image projected by marketing and support? For example, are they offering the same advice to customers? What does the hand-off look like between sales and marketing/support? This goes back to creating a consistent customer journey. The same message needs to be presented across departments.

Below are steps for creating a job-shadowing program.

1. **Pitch the idea / Schedule a team meeting.** Before announcing your shadowing program, you'll need to get departmental leaders on board with the idea. Schedule a meeting with managers, and outline the mutual benefits (touch on benefits listed above) and how the exercise aligns with overall company goals. Find out from different departments about current perceptions and what skills they want to learn more about. Also discuss what days and times work best across departments to implement the job-shadowing program and its departmental rotation. Set up a tactical plan based on this discussion.

2. **Hold a short training session for participants.** Run department members through a quick training session. This should be a watered-down version of your general onboarding. Don't overwhelm your audience with information. Hit the highlights,

Even just getting to know each other on a personal level can break silos and encourage better communication across teams.

and focus on key strategies and activities. Provide visuals where appropriate. If you have a video used for onboarding, show it. Also include a few of your reps in this session, and have them interact and answer questions. Provide a shadowing schedule via email and hard copy to participants, as well as a list of which employees will be matched with which rep.

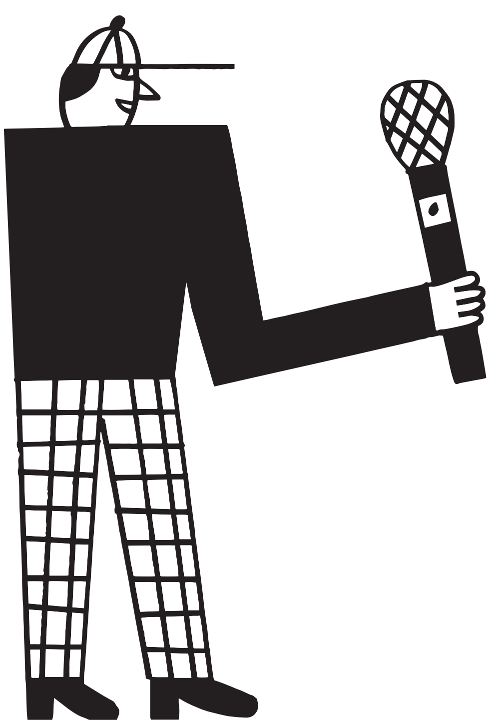
3. **Begin the shadowing rotation.** Take the schedule you created in Step 1, and set as a monthly recurring event in Google Calendar. Maybe you set shadowing for the third Wednesday of the month for an hour or two (whatever makes the most sense for your teams). Send invites to participants and automated reminder emails closer to the actual event (include who is matched with whom). A few ideas of beneficial shadowing activities include cold calls, product demos, and follow-up calls.

4. **Debrief the team.** During the exercise, send monthly questionnaires via email for updates on what activity was shadowed for the month, and provide a brief observation. At the end of the cycle, send a more in-depth survey to participants (or even an email with questions to think about). Next, pull everyone together for a debriefing. Ask specific questions to determine whether the exercise was successful. What did they learn? How does this change what they do in their role? Compile results into a short report to share with departmental leaders, highlighting specific benefits and challenges.

These types of exercises also help employees learn what areas need improving within the company. And even just getting to know each other on a personal level can break silos and encourage better communication across teams. Try the job-shadowing program first with one department, such as sales. If successful, you'll have a model to replicate with support and marketing.

Conclusion

If managed correctly, cross-team training can benefit all teams — not only does it help develop shared skills, it also builds rapport and reduces the “us vs. them” mentality. Most importantly, cross-team training means that each department knows what the other is doing. This internal context creates a better and more consistent customer experience.



Offer the right tools

Your company's marketing team has just rolled out an in-depth blog post about a new product feature and it's now being promoted on all social media channels. The problem is, your support team wasn't informed before publishing — they're now overwhelmed with customer questions.

Does this scenario sound familiar? Whether you're with sales, marketing, or support, lack of transparency and collaboration are common problems among these departments. To be successful, teams need to be aware of other department initiatives and conversations so there are no gaps or overlap in customer messaging. Even awareness of internal projects and initiatives also decreases frustration among departments.

Just as cross-team training gives employees a higher-level view of different skills and processes, cross-team collaboration allows teams to work together "in the trenches" and to offer valuable feedback to each other on a regular basis. A CRM, CRM integrations, automations, and internal collaboration tools make this alignment possible.

Invest in a CRM

Short for "customer relationship management," a CRM is software that's designed to store and manage your customer data. Consider it a type of intelligent database that's built around relationships. As you insert customer info into your CRM, it not only organizes the data but also turns the data into insights.

Too often, companies have all of their customer info spread out across different channels.

Especially as your company grows, you need one central place to store all of your customer details. Too often, companies have all of their customer info spread out across different channels. This practice not only is inefficient but also interferes with a consistent customer experience.

With CRM software, you can manage and track every touchpoint of a customer relationship, from initial contact to long-term interactions. Improving your customer relationships is essential — after all, your customers are what keeps your business going. From tracking complaints to buying behavior, the purpose of your CRM is to ultimately

- store customer information (e.g., customer name, address, purchase date, etc.);
- monitor all interactions between the customer and your company (e.g., emails, phone calls, in-person meetings, etc.);
- analyze customer interactions and behaviors; and
- create personalized experiences and offerings based on your CRM insights.

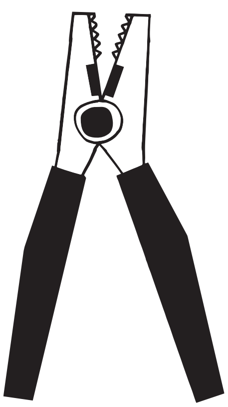
Different types of CRMs can be used for a number of departments — including sales, marketing, and customer service:

- **Sales.** Learn more about your sales pipeline, monitor deals, and track customer interactions and progress with a sales CRM. Contact management, sales tracking, and reporting tools are all in one place, so you don't have to implement multiple point solutions.
- **Marketing.** If you're with a marketing department, use a CRM to find out information about website visitors and the effectiveness of your campaigns and to determine how much revenue

marketing efforts are bringing in. You can easily segment customers by geography or industry so you can create even more personalized content. You also know exactly where leads are coming from.

- **Customer Service.** With a customer service CRM, you manage all of your customer interactions on one platform. Track tickets, make phone calls, and review customer satisfaction metrics. No matter where customer interactions are coming from (social media, live chat, phone, email, etc.), your CRM should be able to create tickets based off of each interaction so you can solve customer problems faster and more efficiently. You can also make better solution recommendations after reviewing past interactions.

With a CRM acting as the foundation for your alignment process, optimize features that most CRMs offer, including integrations and automations.



Use CRM integrations

CRM integrations are helpful features that connect your CRM with tools like your calendar, Google Sheets, and Slack. They allow all departmental tools to communicate with each other seamlessly and offer a single customer view.

A variety of easy-to-use integrations are available within your software (if they're not or if coding is required, you might need to look for a different CRM). Let's look at examples/use cases of CRM integrations for marketing, customer support, and the sales department and how they connect:

- **Marketing automation software.** Common marketing automation software includes Marketo, HubSpot, and Mailchimp (for email marketing). All of these tools can be directly

Integration means that no customer conversation falls through the cracks.

integrated with Zendesk Sell (a sales CRM). The integration allows your sales team to directly receive leads and data as marketing interacts with potential customers.

- **Customer relationship management software.** Zendesk Support is an excellent customer support system that helps track, prioritize, and solve customer support tickets. Integrate this platform with Zendesk Sell so sales reps can easily see support ticket conversations and work with support to solve customer issues. For support, contact and deal information is provided on every support ticket so reps can prioritize their time and tasks.
- **Sales automation software or a Sales CRM.** If you're a marketing department using a tool such as Marketo, you can integrate with a sales CRM such as Sell where lead tracking is available and leads move directly from marketing to sales. You can choose what triggers and actions you want to happen for each lead. For example, if you create a new lead in marketing, then a new follow-up task is automatically created for sales.

Integration means that no customer conversation falls through the cracks. They also provide transparency between departments, a better workflow, and bridge communication gaps. Meet with the management team of sales, marketing, and support to audit your current list of software and choose integrations that make the most sense for your company.

Maximize CRM automations

Integrations lay the foundation for helpful automations. Employees waste time every day on mundane yet necessary tasks. According to one report, 90% of managers spend two days every week on administrative tasks, and 20% of respondents said that they spend three days or more.

90%

of managers spend two days every week on administrative tasks

If your team members are missing opportunities to meaningfully connect with each other and the customer, automate repetitive tasks that take away from core activities — tasks such as manual data entry and email reminders.

Your CRM can automate and significantly improve tasks within the sales, marketing, and support process. No matter what department you're in, ask yourself questions about the tools you currently have:

- Does your CRM have a built-in call tool?
- Are conversations accessible across all department platforms?
- Are some of your emails automated?

Take this audit and determine what tasks need automating. How much time does your marketing team spend on email reminders? How often are support reps having to contact sales about a support ticket conversation? Review tasks that require a human touch and those that don't.

Helpful automations for each department include:

- **Marketing.** Email automations are an excellent way for marketing to maintain customer touch points without the manual data entry. With Sell's integration with email marketing tool Mailchimp, contact info is automatically transferred between the tools. Similarly, with the Facebook integration, marketing can add a customizable web form to the company website that automatically converts inquiries into leads for immediate follow-up and tracking in Sell.
- **Sales.** Creating tasks for every new lead inputted is time consuming and unnecessary. Sell offers Automated Actions

to streamline the workflow within the Sell CRM. For example, you can set an automatic action to create a task every time you add a contact. This feature helps eliminate manual data entry for sales tracking. Zendesk Sell also has a built-in call tool that automatically records every customer call so no important information is missed. These conversations and email messages can also be accessed across departments.

- **Support.** A common issue for support is missing tickets. Zendesk Support offers automations such as alerting agents when a certain ticket goes unresolved after X amount of hours. The platform can also automatically send an SMS text message when an urgent ticket has been unattended for more than 48 hours. You also have the ability to easily edit and clone certain automations.

Automations aren't just efficient — they give you back valuable time to spend on the customer. Take advantage of the automations that your CRM offers and devote more energy to internal communications and customer conversations.

Implement internal collaboration tools

In addition to your CRM, a number of other internal collaboration tools can help sales/marketing/support teams align their projects and initiatives.

Misunderstandings are a common problem among departments. Without clear internal communications, departments operate in silos without any awareness of what's happening elsewhere in the company (a major issue for a consistent customer journey).

For example, marketing might funnel new leads to sales and then get irritated when sales doesn't follow up with a large number of them. On the sales side, reps are only focusing on quality

A shared inbox means a faster response time to customers and transparent conversations.

leads and throwing out the rest. Conversations between the departments about what constitutes a qualified lead and seeing each other's process would help eliminate wasted effort. Other internal problems include:

- Unawareness of other department's campaigns and projects
- Misaligned departmental goals
- Confusing departmental jargon and language

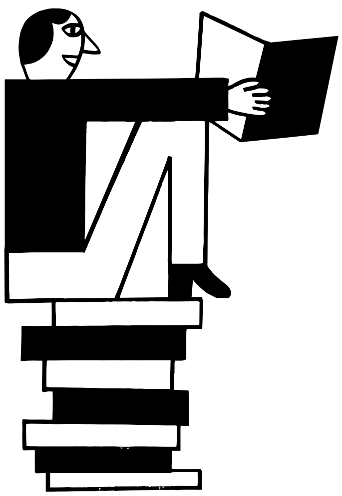
Combat these problems by empowering employees with collaboration tools. These tools help employees learn the why behind departmental strategies and allows them to provide insightful feedback on what's working and what's not.

COLLABORATION HUB

Ensure that collaboration is a simple process with a collaboration hub. For example, Slack is an internal collaboration hub that allows teams to easily converse with each other without having to compose emails. Create different channels such as #sales or #marketingtools where employees can have conversations or ask specific questions. Also use the Donut integration to pair team members together on a regular basis for #watercoolerchats and encourage informal interactions to build rapport.

SHARED INBOX

A shared inbox means a faster response time to customers and transparent conversations. All team members have access to every customer conversation while still maintaining their personal account. Use an email tool like Front and create "groups" within your shared inbox. For example, for emails that involve sales, marketing, and support, create a “@teamsms” group to cc in certain emails. Front also gives the ability to comment on emails and tag different employees to get their opinion on various conversations.



RESOURCE LIBRARY

Create an online location where all teams can access and add new sales-enablement material. A resource library is especially helpful for marketing as they get more input on materials they’re creating. You can use a tool like Airtable to organize resources and sort assets by Type, Format, Industry, Market, etc. Another method is to create a Google spreadsheet that includes different categories:

- Type of resource (e.g., blog post)
- Title of the resource
- Category
- Buyer personas
- Link or file download

Use a tool that’s easy for sales and support reps to leave comments in real time and ask for new resources if needed.

VIDEO SOFTWARE

Sometimes face-to-face conversations are needed to clarify issues that can’t be resolved via a typed message. Especially for distributed teams, video software such as Zoom or GoToMeeting are excellent tools to use.

With recording and screen-sharing features, video software can be used to schedule 1:1s, departmental meetings, or impromptu calls. For example, if a support team member is having difficulty understanding a customer discount that sales offered, she can send a Slack message asking for a quick call with a sales rep and then send a Zoom link.

MIDDLEWARE

Indicative of its name, middleware is software that acts as technology building blocks for other software — in other words, software that fits between applications and an operating system. The software is an excellent way to connect different departments and their platforms. Plus, it's is an affordable solution for SMB or emerging businesses with limited developer resources.

You may be more familiar with different types of middleware than you think:

- API (application programming interface)
- Application integrations
- Data integrations
- Application server

Zapier, Tray.io, and Azuqua are all application integration/ automation middleware that make connecting platforms and apps simple. For example, although you can build integrations within Zapier, the platform also offers integrations that you can easily install, such as between a CRM and an email system.

Successful collaboration among departments requires constant communication.

Let's say that you have a support CRM like Zendesk. You want to add new Zendesk users to a MailChimp list automatically. Instead of hiring a developer, you can go through Zapier to find an integration between the two platforms (no coding necessary). Marketing can then directly access the new user information for email campaigns and customer segmentation.

PROJECT MANAGEMENT TOOLS

Every department has their own initiatives and projects. Sometimes it's helpful to get feedback on these projects from other customer-facing departments. Trello, Asana, and Basecamp are tools that help centralize projects across departments — whether marketing needs input on sales-enablement material or sales needs to notify support about a process change.

Trello offers a visual overview of projects with "cards" that can be moved to different stages. Participants can also comment and tag various employees. For example, marketing could tag sales to review an email campaign. Once sales has reviewed, they can move the card to the next stage. Team members have a visual of project progression with this tool.

Basecamp gives the option for team members to provide important updates on their work. Asana provides a checklist that team members can use to assign projects. For example, maybe marketing needs input from support on an upcoming "pain point" blog article. Marketing can assign a task to support and a deadline to review the document.

Successful collaboration among departments requires constant communication. Organize your communications strategically with the above tools to give employees the ability to easily collaborate and interact.

Conclusion

Cross-team collaboration is only possible with the right tools. Make it easy for your teams to talk to one another and work together. The resulting aligned language, improved customer insights, and shared resources help sales/marketing/support achieve their individual and collective goals. A transparent culture is also created and reduces resentment between departments.

Collaborate on company email campaigns

Email is a powerful way to grow your business. Even in the age of tools like Slack, the growing popularity of asynchronous communication, and the fact that the average office worker receives 121 emails every day, email marketing is 40x more effective than social media.

Unfortunately, despite email's strong potential, many SMBs struggle with their email marketing strategy and are unsure if their email campaigns are even successful.

To generate effective campaigns for both lead acquisition and customer retention, your marketing team should be in a constant feedback loop with sales and support and take advantage of proven tools and strategies for SMB email marketing.

Align email content with sales and support

When you begin using a new form of content or, in this case, an old form in a new way, get buy-in from other departments likely to be affected, such as sales and support (two important faces of the company). Their input ensures that the right customer personas are being targeted and that email content meets customer needs.

The average office worker receives **121** emails every day.

- **Sales.** Reps can share sales calls, emails, and social media conversations. Ask sales managers: “What information are potential customers asking for? What are their pain points and what content could interest/convert them?”
- **Support.** Similarly, support has a finger on the pulse of customer questions and concerns. What information are current customers asking for? What type of email content will assist with customer retention?

Another step in content alignment is assisting sales/support with their own email campaigns. For example, if you roll out a top-of-the-funnel (TOF) email course and begin receiving a flood of new leads, sales might not be able to handle the influx of requests (especially if they have a smaller team). Come alongside sales and help them automate communication touchpoints like email follow-up.

Plan to have monthly conversations to discuss what email content you have in the pipeline and how this content could affect sales/support. Strategize together to create a consistent customer email journey.

Invest in a marketing automation platform

Sending mass emails from a personal address such as Outlook or Gmail presents multiple problems. Not only is it an inefficient and unprotected process, but it’s much harder to segment your list of customers and track the ROI of your campaigns.

A marketing automation platform such as Mailchimp takes your email list and provides actionable insights on the campaigns you send. It gives you the ability to create email templates, store lists, run tests, and track effectiveness.

Select the right marketing automation platform for your company with these three steps:

- **Know your requirements.** What are your goals? What capabilities does your marketing automation platform need? How will a marketing automation platform grow with your company? Also establish your budget for how much you can realistically spend.
- **Get feedback.** Ask sales and support if they are already using a marketing automation platform for their own email activities. Also check with peers in your industry or review conversations/reviews online. No need to reinvent the wheel.
- **Do your research.** Review the different marketing automation software available such as Mailchimp and test through free trials. Make sure that whatever platform you choose, it aligns with your requirements (e.g,. is there a limit to how many emails you can send?) and can integrate with your sales/support CRM so no conversation falls through the cracks.

A marketing automation platform is the smartest way to approach email campaigns. You don't have to worry about manually inserting contact info or analyzing results. Instead, the platform does the work for you so you can focus on optimizing every campaign.

Use different types of email campaigns

Email marketing operates across two sections: customer segments and their stage in the customer journey. Start by organizing your email list by customer demographics, pain points, etc. Then, divide the customers in each segment according to their purchase stage:

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PRE-PURCHASE STAGE

This email category assists with lead generation (important for your sales team). Cold lead nurture, trial engagement, and middle-of-the-funnel (MOF) content are a few ideas for this category.

- **Cold lead nurture.** These leads have heard of your product/service but aren't ready to buy yet. You need to warm them up to the idea. While you don't want to email them every day, *strategize with your sales team* about the nurturing sequence. Send a variety of educational content such as a TOF course (e.g. "The Beginner's Guide to Social Selling") or ask them to connect on social media.
- **Trial engagement.** When new people sign up for a trial, you have the opportunity to convince them they need your product/service. Organize trial users by active, partially active, and inactive to determine what messages to send each one. For example, active users would benefit from a clear product case study while an inactive user might benefit from friendly "give us a try" reminders.
- **MOF content.** Middle-of-the-funnel content is aimed at customers seriously considering your product. By sending resources such as case studies, videos (e.g., product videos, feature tutorials, and testimonials like Slack, and product comparisons, you are giving potential customers more reasons to purchase your product/service.

Pre-purchase emails help get your audience in the door. Once they've purchased, you'll need to send email campaigns that focus on customer retention.

POST-PURCHASE

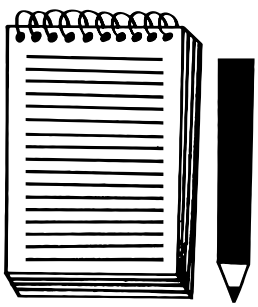
Subscription companies want to stay top of mind for customers. And customer-nurturing emails are an excellent way to accomplish this goal.

- **Welcome email series.** Send three to five onboarding messages that welcome new customers to your company. Thank them for their purchase. Share your social media accounts to follow. Give tips on how to use your product/service.
- **Nurturing campaigns.** These campaigns don't need to be about using your service/product. Include information that helps with customer industry needs (i.e., a series of checklists, templates, or an educational course).
- **Product announcements.** Engage (or re-engage!) your audience by sending news about your product. Have you added a new feature to your software? Or has your platform been given an overhaul? Include visuals and clear copy about the change and important info.
- **Newsletters.** If done correctly, newsletters can be a key part of email marketing. Sometimes companies create a newsletter because...well, that's what's supposed to be done. Make every newsletter valuable to the subscriber. Newsletters shouldn't be purely promotional. Send company updates, but also direct customers to educational material, such as blog posts and videos.

Use your marketing automation platform such as Mailchimp to automate any type of email campaigns (also known as "drip" campaigns). For example, if a potential customer has been an active user of your free product trial but hasn't yet made the purchase, an automatic email can be sent after a specific amount of days with a list of the cool benefits customers receive after purchase.

Create your email campaign copy

It’s now time to plan your email copy. The right copy will also depend on your customer segments and their stage in the customer journey. For example, you wouldn’t send an introductory sales course to a manager who’s been working in sales for fifteen years.



- **Work with sales and support.** Get their input to develop email content ideas based on shared customer personas. Establish a shareable email marketing content plan using Google Spreadsheets or Airtable that includes due dates, deadlines, roll-out date, points of contact (POCs), etc. Sales and support can then easily add their own ideas and feedback.
- **Create a mix of educational and promotional emails.** Use your segmented lists and third-party integrations from your CRM to send personalized messages. Repurpose content from the blog. Create narratives (case studies) from your customers’ successes. Turn long-form guides into an email series. Create videos of how to use your product/service. Get creative and repurpose as much as possible!
- **Work from email copy best-practices.** Include a call-to-action (CTA) in each email and make it easy for readers to click/convert. Experiment with your subject lines. For example, personalized subject lines (e.g., using the customer’s first name) increase open rates by 50%. Also, make the copy conversational rather than fill it with business jargon.
- **Keep your first template simple.** Don’t go crazy with fancy designs — experiment with your marketing automation software’s pre-designed templates and customize if needed.

Also ensure that every email design is aligned with your brand. If you have a campaign landing page, the email should match the design. Limit the amount of links you include in your emails as they could get marked as spam.

Your ultimate goal with email campaigns is to build a relationship with your customers. Creating thoughtful email messages will help accomplish this goal.

Send your email campaigns

Be your own first reader.

Before sending your emails to everyone on your list, send test emails to yourself and **sales/support** to ensure that there are no errors or mistakes. For example, Mailchimp offers a preview mode so you can check format, images, links and also how the email will look on different devices.

Other best practices for sending email campaigns include:

- **Use A/B testing.** Create two variations of your email campaigns to determine which gets a higher open rate. Your marketing automation software should have a split test feature. And along with the body of the email, experiment with the subject lines to find out which ones drive the most interest.
- **Choose your timeline carefully.** The time you send your emails matters - you want people to read what you send. Analyze past open rates in Google Analytics to see what time is best to send campaigns (late afternoon has been found to be the best time for email opens).

- **Set a delivery cadence.** Along with sending emails at the right time to customers, you also need to determine how often to send emails. Don't overwhelm customers by sending multiple emails every day (receiving too many emails is a common reason why customers unsubscribe). The right email frequency will depend on your customer segments.

Alert **sales/support** after new email campaigns roll out. Forward the emails you sent customers to these departments so they are aware of what you're telling customers and what customer questions to expect.

Analyze email campaign results

You have your emails sent out into the world — regularly review the data to determine what emails are receiving the most interaction with potential and current customers.

- **Track your email marketing KPIs.** Review metrics such as email open rate, bounce rate, conversion rate, unsubscribes to get a sense of what content resonates with different audiences. Ensure that you have your Google Analytics connected with your marketing automation platform and set up different goals for each campaign.
- **Use your CRM.** Track customer conversations with sales and support through your CRM. Are certain emails being forwarded by customer to sales? What questions are they asking? Also look at other departmental channels such as live chat and phone convos. Are customers asking about a new product feature based on your emails?
- **Clean your list as needed.** A common problem with poorly performing email campaigns is inaccurate data. Validate

and update information such as email addresses. Remove duplicates, and delete contacts who are wasting your resources. This kind of data cleansing enhances the value of your current data.

- **Discuss campaign results.** While it's important to know the actual numbers, it's also essential to know the "why" behind results. You have to interpret your data. Get feedback from sales and support on ways to improve. If certain types of emails performed poorly for a specific audience, brainstorm on better content ideas or the best time of day to reach the customer.

Let's put these steps into practice. Maybe you have an email nurturing campaign for your CEO audience that has a high open rate, but a similar campaign for your management audience is performing poorly. Research all possible factors for the difference.

For example, is your email database clean for your management audience? Or is the content aligned with the audience's interests? Similarly, if your bounce rate is high for all of your email campaigns, you might have inaccurate contact information. Or perhaps your audience rarely opens emails late in the day (sales should be aware of this information).

Again, it's important to talk with **sales and support** about possible reasons for low engagement as they know the customer best. Take these email campaign results and analyzations to determine how you can improve next time.

Conclusion

Email marketing requires careful planning and collaboration, but efforts are typically worth it. If you're dealing with a tight budget, email campaigns are also a great way to interact with customers without spending massive amounts of money. You can also build your brand voice while strengthening the customer relationship. Include sales and support throughout the process to ensure that the right email content is reaching customers at the right time.