



9

QUESTIONS
(AND ANSWERS)
TO ENSURE
COLLABORATION
BETWEEN SALES
AND MARKETING

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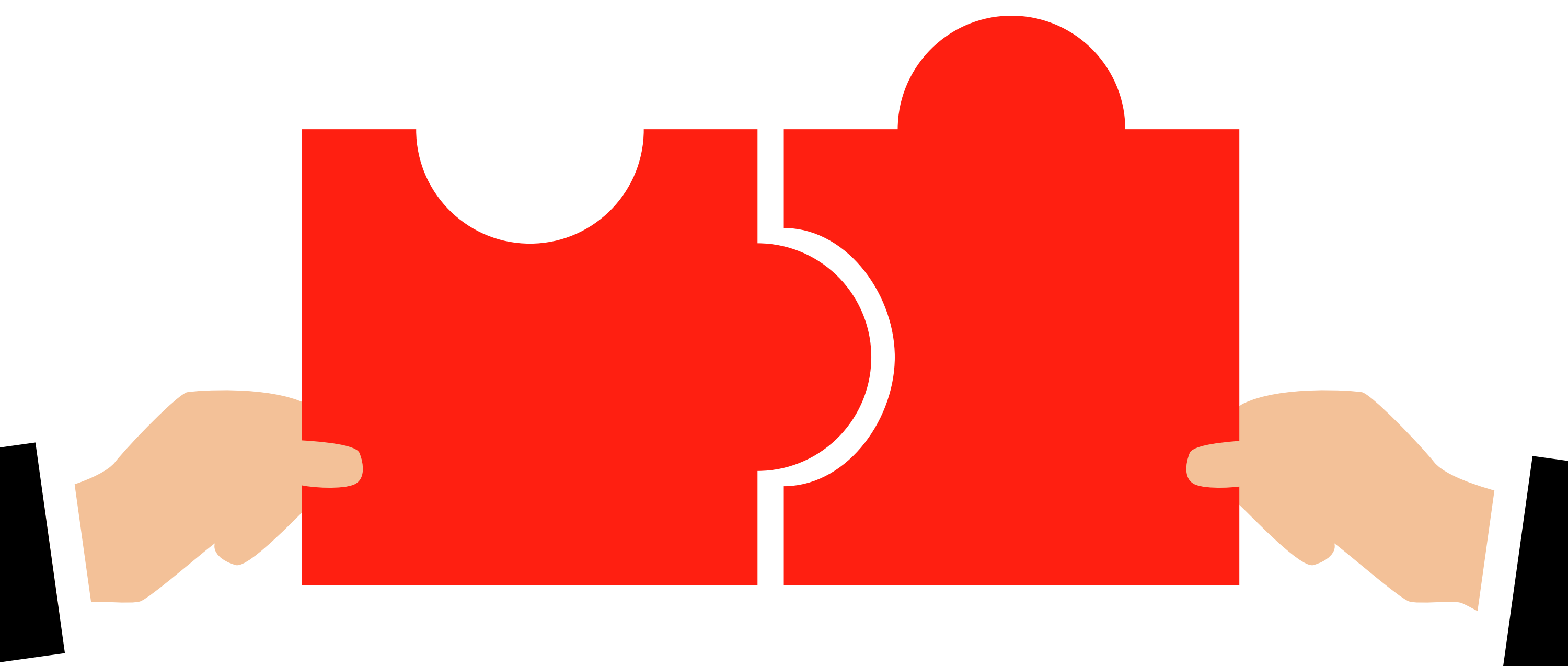
Introduction

In many companies, the sales and marketing teams have a hard time working together. In fact, in a survey carried out by the esteemed research and consulting firm [Forrester Research](#), just 8% of companies reported having strong cooperation between their sales and marketing departments.

In order for a company to grow, turn a profit and achieve its goals, it's vital that sales and marketing work together. When these two departments are in synergy, the company will perform better.

Having good communication and interaction between sales and marketing makes for a better exchange of information and data. And in today's business world, data is the alpha and omega.





»A strong collaboration between sales and marketing is important because an organization should be driven by data rather than assumptions. If you can't see it, you can't manage it,« says AlfaPeople's General Manager Paw Steffensen.

Getting marketing and sales to work together requires changes to the organization and working processes. The best way to create change is to first get an understanding of the way the two departments currently collaborate – if they do it at all. This e-book can help you do just that.

Consider this e-book, and the questions that make up the following chapters, as a tool that can help you ensure a good and productive collaboration between sales and marketing that will support the development and success of your company. Check the box at the beginning of each chapter that best describes your situation. By the end of the book, you'll be able to conclude whether the sales and marketing teams at your company are on the same page.





01

Does marketing know what is happening in sales?

Does marketing know what is happening in sales?

- 1 ☐ The marketing team does not fully understand the sales department's functions, processes and abilities.
- 2 ☐ The entire marketing department understands the sales team's functions, processes and abilities.

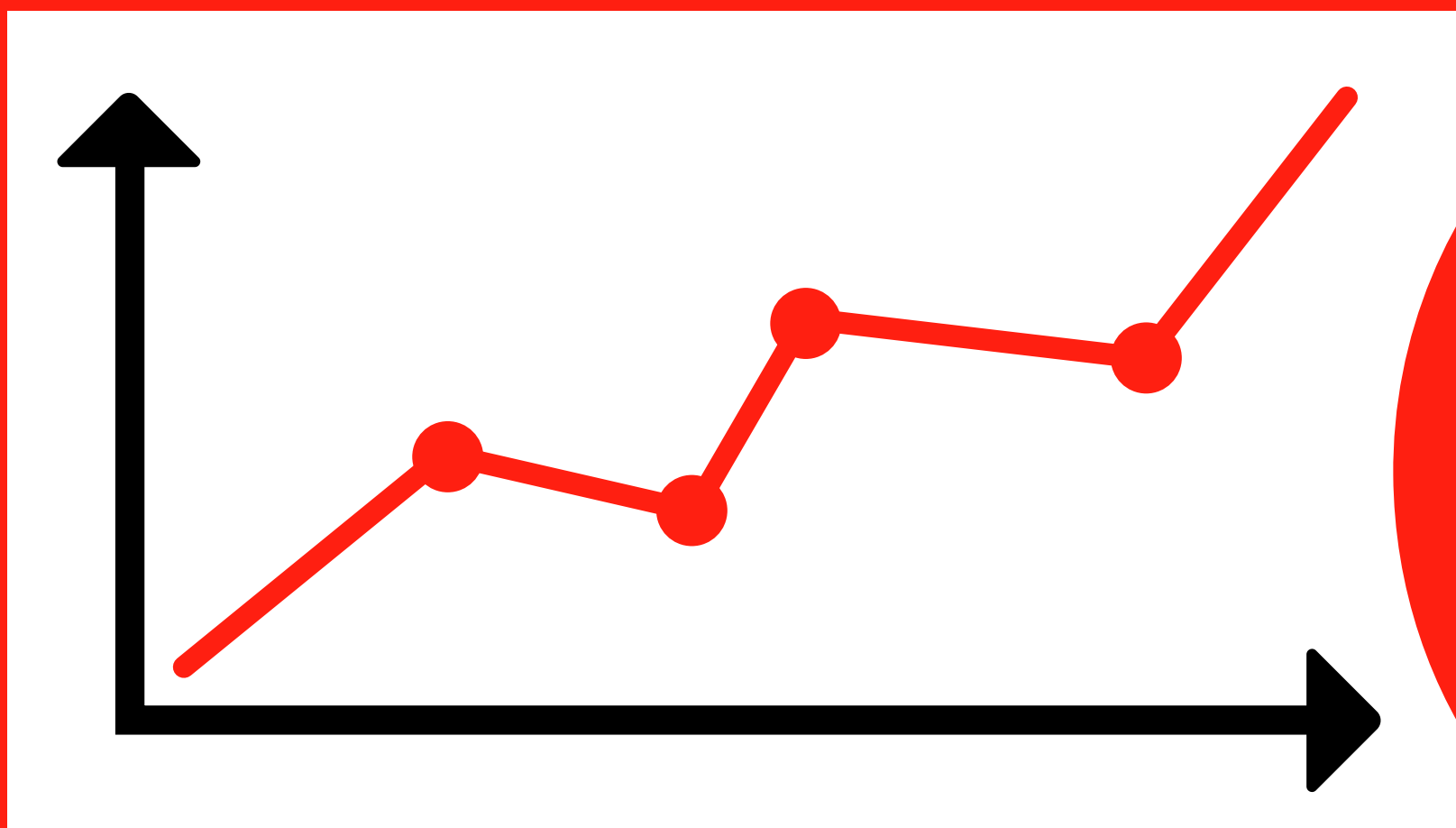
What does my answer reveal?

If the answer is that your company's marketing department doesn't really understand what the sales team is doing, you and your management colleagues should take a critical look at how the two departments collaborate.



AlfaPeople's Marketing Lead, Gitte Højgaard Mouritsen, says that marketing's failure to understand sales is often due to a lack of measurable data.

»If marketing doesn't understand what's happening in sales, it's likely due to a lack of feedback from the sales side. If the sales team doesn't send data and insights back to marketing, marketing can't know whether they were successful or not. In the worst case scenario, that could mean that marketing begins to communicate in a way that doesn't match the company's actual performance or satisfy the interests of their customers or the market,« Højgaard Mouritsen says.



How to ensure that marketing understands sales

Marketing needs to have insight into the strategies, business goals and work processes of a company's other departments. This is particularly true when it comes to the sales department.

Microsoft Dynamics 365 or another CRM system can help create understanding by ensuring the exchange of data between departments, Gitte Højgaard Mouritsen says.



»It is essential to have a system in place that shares data between departments,« says Højgaard Mouritsen.

»With a growing amount of data in both marketing and sales, it's vital that marketing understands how we are performing,« she continued. »When we know what the sales team is trying to achieve, we are able to take advantage of the shared platform to nurture our leads to the point where sales wants them. Marketing can share the customer's history with sales so that they can see their path to becoming a hot lead. This can be things like lead time, content and activities.«

But it's not just about digital solutions, Højgaard Mouritsen said.

»There's also the human element of including marketing in sales meetings. That gives our marketing team assurance that something is actually happening with the leads we're providing. This helps us put our eggs in the right basket,« she says.

From a management perspective, this provides more certainty that a company's marketing activities are actually meeting predetermined goals. In other words, you'll know whether your investments in marketing investments are actually paying off.



02

Does sales know what is happening in marketing?



Does sales know what is happening in marketing?

- 1** ☐ The sales team lacks an understanding of marketing's value creation.
- 2** ☐ The sales team understands marketing's role and function as a value creator.

What does my answer reveal?

If sales lacks an understanding of the marketing department's value creation, the alignment between these two teams is something your company needs to work on. If the entire sales team already understands marketing's role and function, you are well on your way to a productive collaboration.



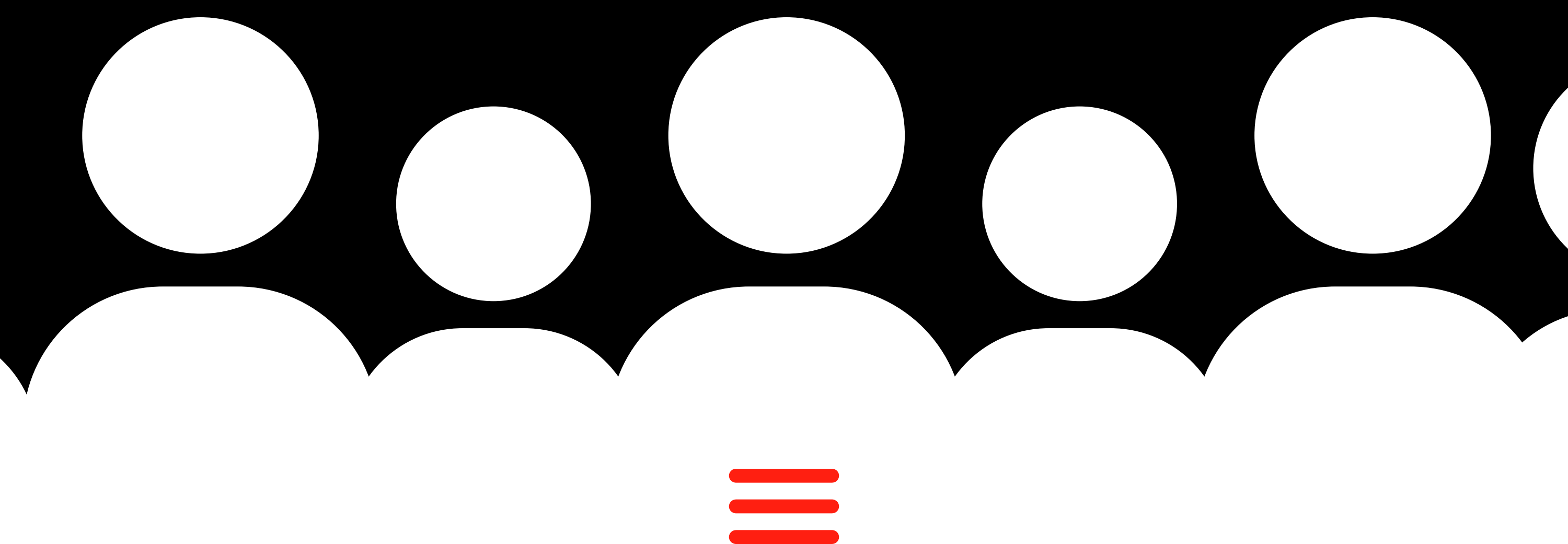
AlfaPeople's General Manager, Paw Steffensen, believes that his sales team would be wasting their time if they're not taking data and insights from marketing seriously.

»The data from marketing can reveal a lot about when a salesperson should contact a lead. It's all about due diligence. When sales gets a lead from marketing, we are also getting information on what the lead has reacted to and when. It's important that sales acts on hot leads before they get cold. That's why sales needs to work closely with marketing,« Paw Steffensen says.

How to ensure that sales understands marketing

Some might say that marketing simply needs to know what the sales team needs. Full stop. But that's not completely true. Sales and marketing need to function as a united team.

A CRM system like Microsoft Dynamics 365 can help foster and support this unity. With the right setup, the system can handle data from marketing and make it available to sales.

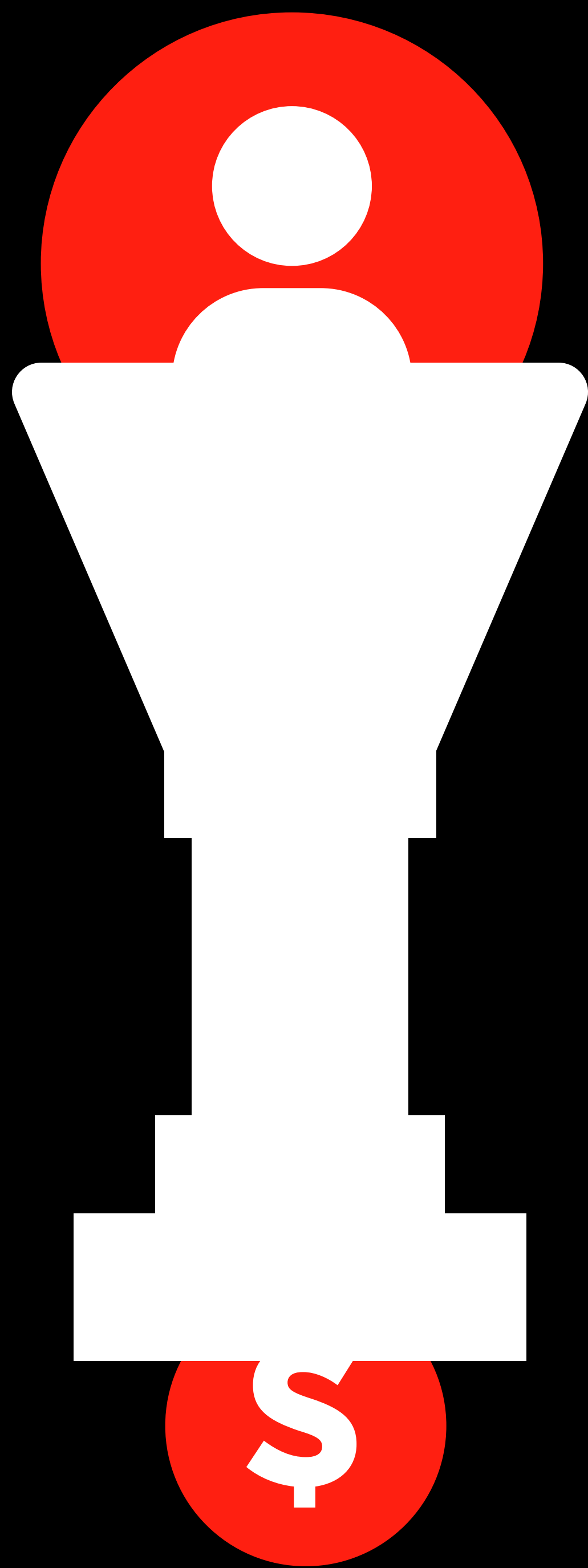




»That means that the salespeople get the necessary insight into when a lead or potential customer is warm enough and why they're ready to be approached by sales. You should also be sure to have physical meetings that bring the sales and marketing teams together. This will show sales that the marketing team is committed to giving them the best conditions for success,« says Paw Steffensen.

Sales and marketing should understand one another and respect what each side contributes to the common good. By working with a system like Microsoft Dynamics 365's sales and marketing modules, management can ensure that the experiences of the sales team are shared with marketing.

The data from the sales department is made easily available to marketing, allowing the marketing team to see how their activities are performing. At the same time, marketing can contribute a lot of valuable data to sales that will show them precisely when a lead is ready to become a customer.



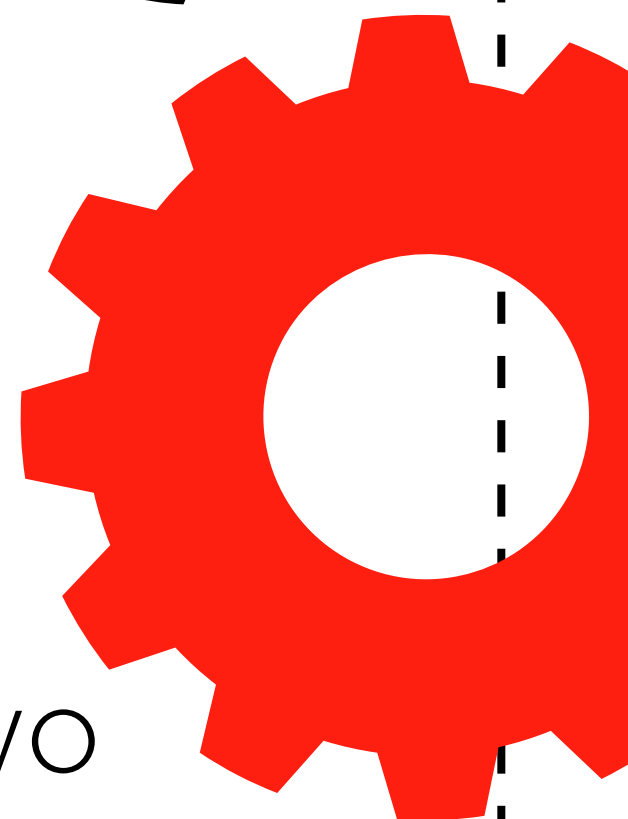
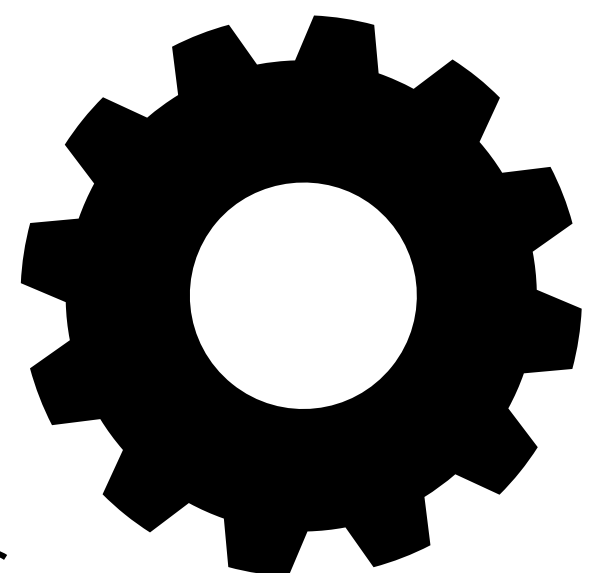
03

How is the relationship between sales and marketing defined?

How is the internal relationship defined within the company?

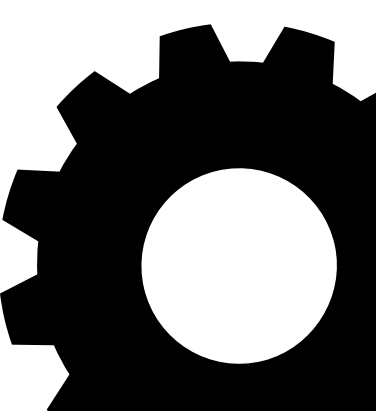
1 ☐ The relationship between sales and marketing is undefined. Their functions were defined individually and each team has its own goals.

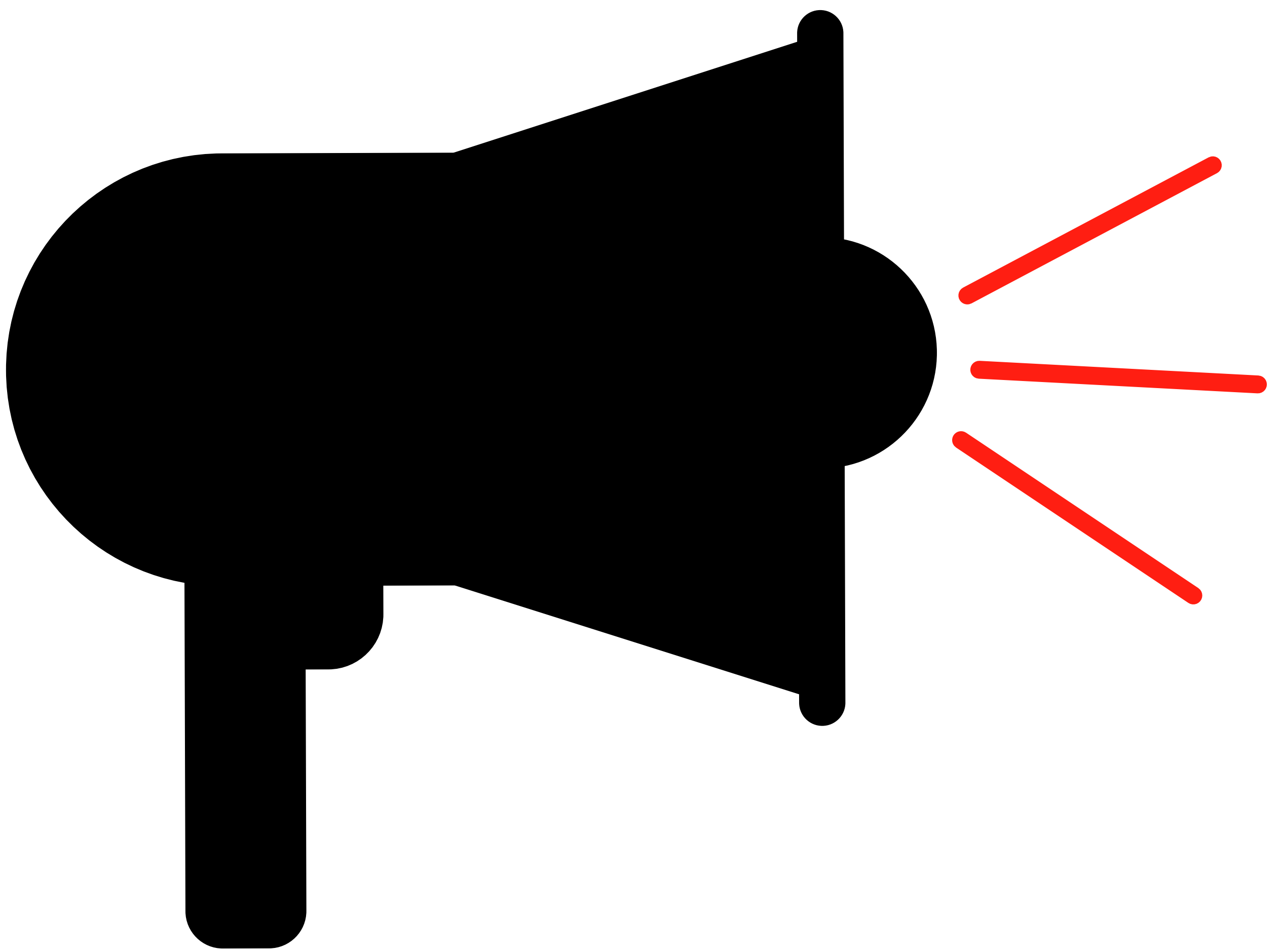
2 ☐ The relationship between the two departments is integrated into how we work. Shared systems measure common goals and create shared rewards.



What does my answer reveal?

If the internal relationship between sales and marketing is undefined, and the two departments focus only on their own functions and goals, it's a sign that you should improve the alignment between the teams. If, on the other hand, the relationship between them is integrated and utilizes shared systems that measure overall performance and create common rewards, your company's marketing and sales teams are probably already well-aligned.





Paw Steffensen, General Manager at AlfaPeople, says it's important that sales and marketing communicate within the same system.

»If you use different systems, the departments might be able to communicate but what they are talking about might not match the systems' tools. This could mean that neither side will really know if they using the same parameters to measuring things,« says Paw Steffensen.

How to integrate internal relationships

Implementing the right CRM system can help you integrate your company's marketing and sales departments. With the Sales and Marketing modules of Microsoft Dynamics 365, you can achieve individually-tailored sales and marketing processes.



»The good thing about Microsoft Dynamics 365 is that you can use it for both personal and general processes. You can create individual processes that interact with larger ones and can be shared with management. For example, there can be an overall business plan that also allows individual employees to create their own personal views or dashboards. The data that the individual employee enters into the system will be linked with the larger goals and processes,« Paw Steffensen explains.

In short, this means that all systems talk to each other and that the data entered into one module will be available in other modules. Other employees can also include it in their dashboards if they want. This also gives management a much better overview of the company's overall performance.

Finally, the advantage of having only one CRM system rather than, say, various spreadsheets, is that it reduces the risk of downtime because everyone is working in one system instead of several smaller ones.



04

Are sales and marketing aligned on their KPIs?

Are the sales and marketing departments aligned on their KPIs?

1 ☐ The value of marketing investments is not evaluated on the basis of sales performance.

2 ☐ The KPIs of both departments are used to give reliable insights

What does my answer reveal?

If marketing investments aren't evaluated on the basis of sales and delivered SQLs, both marketing and sales are missing out on valuable information that could improve their collaboration. You should therefore evaluate whether you can create a better and stronger relationship between the two departments. If, on the other hand, the two departments are using KPIs that provide reliable insight, they are likely already well-aligned.



Gitte Højgaard Mouritsen, Marketing Lead at AlfaPeople, says that it can be difficult for a company to determine the return on its marketing investments.

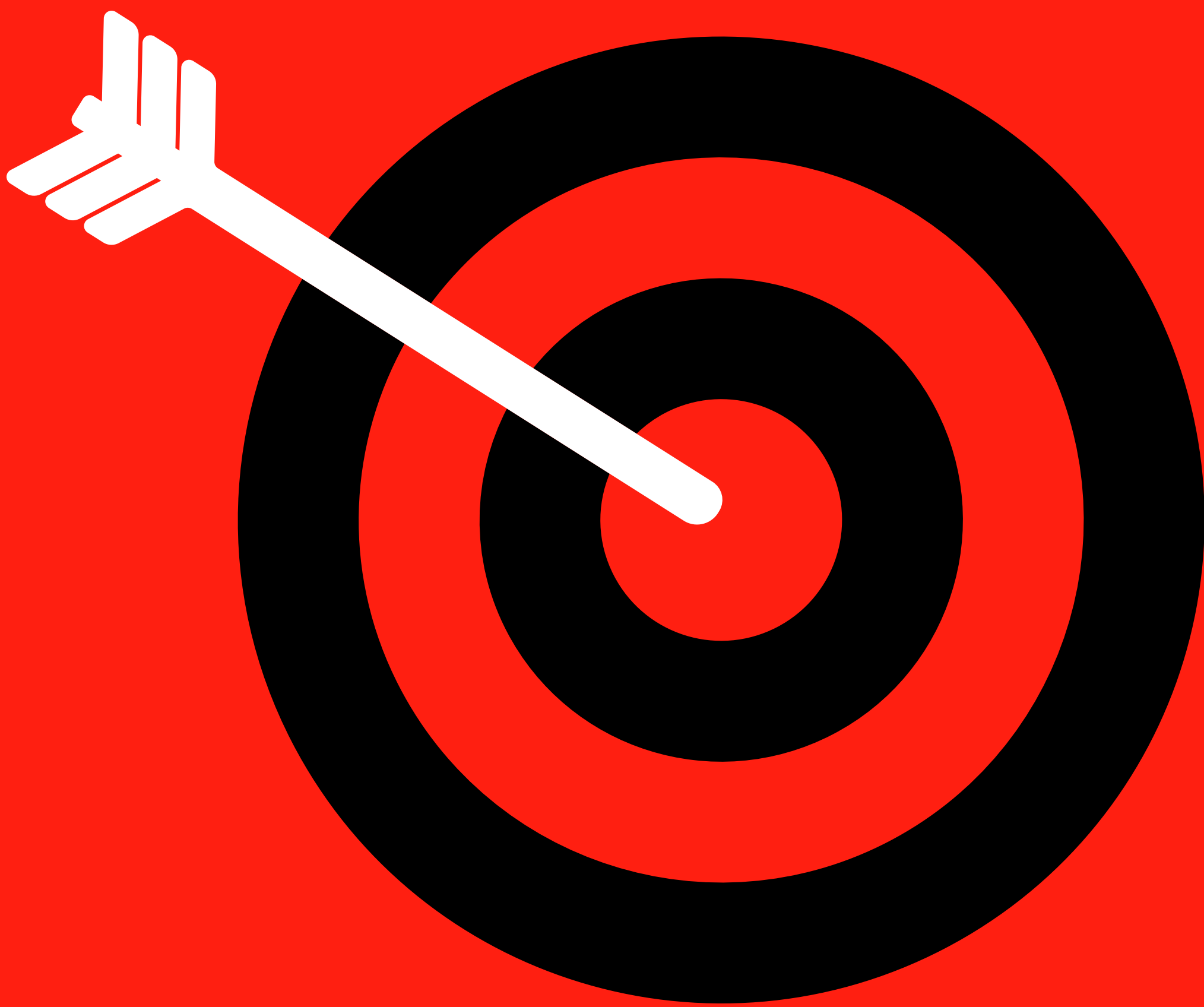
»It's a difficult question to answer if you don't set clear KPIs. Every single activity ends up being measured to some extent on the number of SQLs, generated leads or increased sales among existing customers. Shared KPIs or reference points can ensure alignment between the departments and improve their performance,« Højgaard Mouritsen says.



How to connect the performance metrics of sales and marketing

Coordination between sales and marketing will make your lead generating activities much more effective than they are today. Creating KPIs to measure marketing performance allows the marketing team to demonstrate that they can create qualified leads for the sales team.





At the same time, sales will have an easier time converting because the team will be able to use the established KPIs to clearly tell marketing what is needed. These KPIs can be set up in a CRM system that automatically shares data between the teams as soon as it's entered into the system.

What's important is that both sales and marketing know each other's KPIs because both departments have a responsibility to ensure that every single campaign becomes a success.

Additionally, shared KPIs also allow management to measure the success of various activities, follow up on processes and set new goals. This creates reliability and gives valuable insight into the company's performance.

»It's important that the KPIs come from management. A CRM system like Microsoft Dynamics 365 allows management to set goals and KPIs that they can monitor and follow up on,« says Gitte Højgaard Mouritsen.



SQL AND MQL: WHAT ARE THEY?

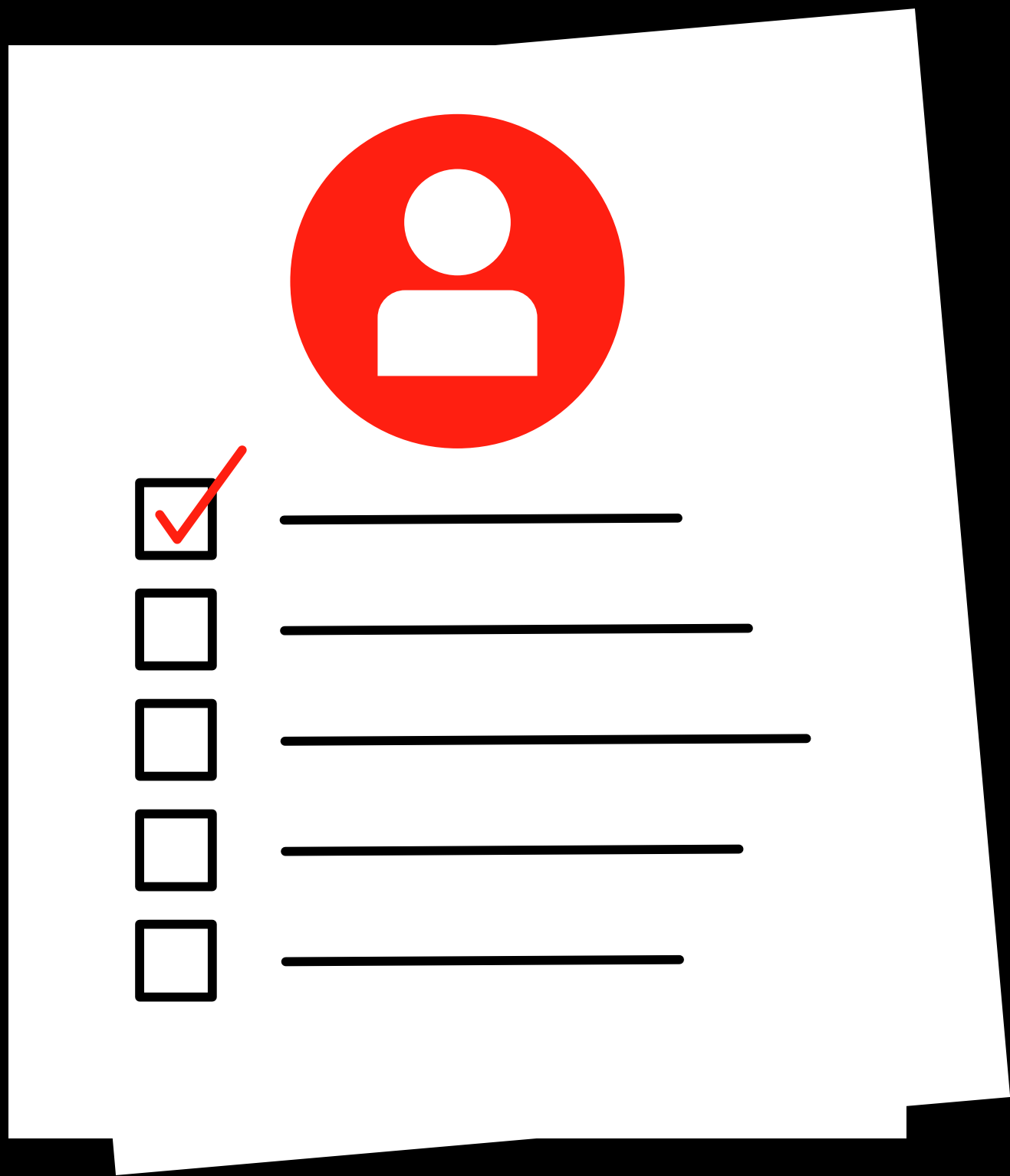
MQL

A Marketing Qualified Lead or MQL is a lead that the marketing team thinks may turn into a customer. Marketing's evaluation is based on criteria like how many pages the lead has visited, the number of content offers they've downloaded, how many CTAs they've clicked on and the amount of social media posts they've interacted with.

SQL

A Sales Qualified Lead or SQL is a potential customer that has expressed an interest in entering into dialogue with the sales team. Typically, the lead has expressed enough interest in your product or service to be moved into the sales process. Often, the lead has also been evaluated by marketing before being sent to sales.





05

Are sales and marketing sorting and qualifying leads?

Are sales and marketing sorting and qualifying leads?

- 1 ☐ Sales receives all potential leads from marketing regardless of how qualified they are.
- 2 ☐ All leads are categorized and qualified, giving an overview of where they are on their buyer's journey.

What does my answer reveal?

If sales is just receiving leads without any sorting or qualification, it's a sign that sales and marketing aren't working together efficiently or sharing data with each other. If the leads are being sorted, the two departments are working well together.



Paw Steffensen, General Manager at AlfaPeople, says knowing precisely when to contact leads and customers increases the likelihood that salespeople will be able to successfully close a sale.

»You can make easier and better sales if you've aligned your departments through a CRM system that ensures that the sales team knows when a lead is ready to be approached for a sale. That's obvious,« says Steffensen.

How to sort leads

By implementing a range of data points and measurements in a CRM system like Microsoft Dynamics 365, you can ensure that your leads are sorted properly. This happens through a so-called lead scoring system, wherein a lead's various actions, interactions and contacts with your company accumulate a score.

To set up this lead scoring system so it benefits both sales and marketing, the two departments need to work together to determine:

- What defines a sales qualified lead (SQL), with both teams agreeing on the criteria for becoming an SQL and when the SQL should be delivered to sales.





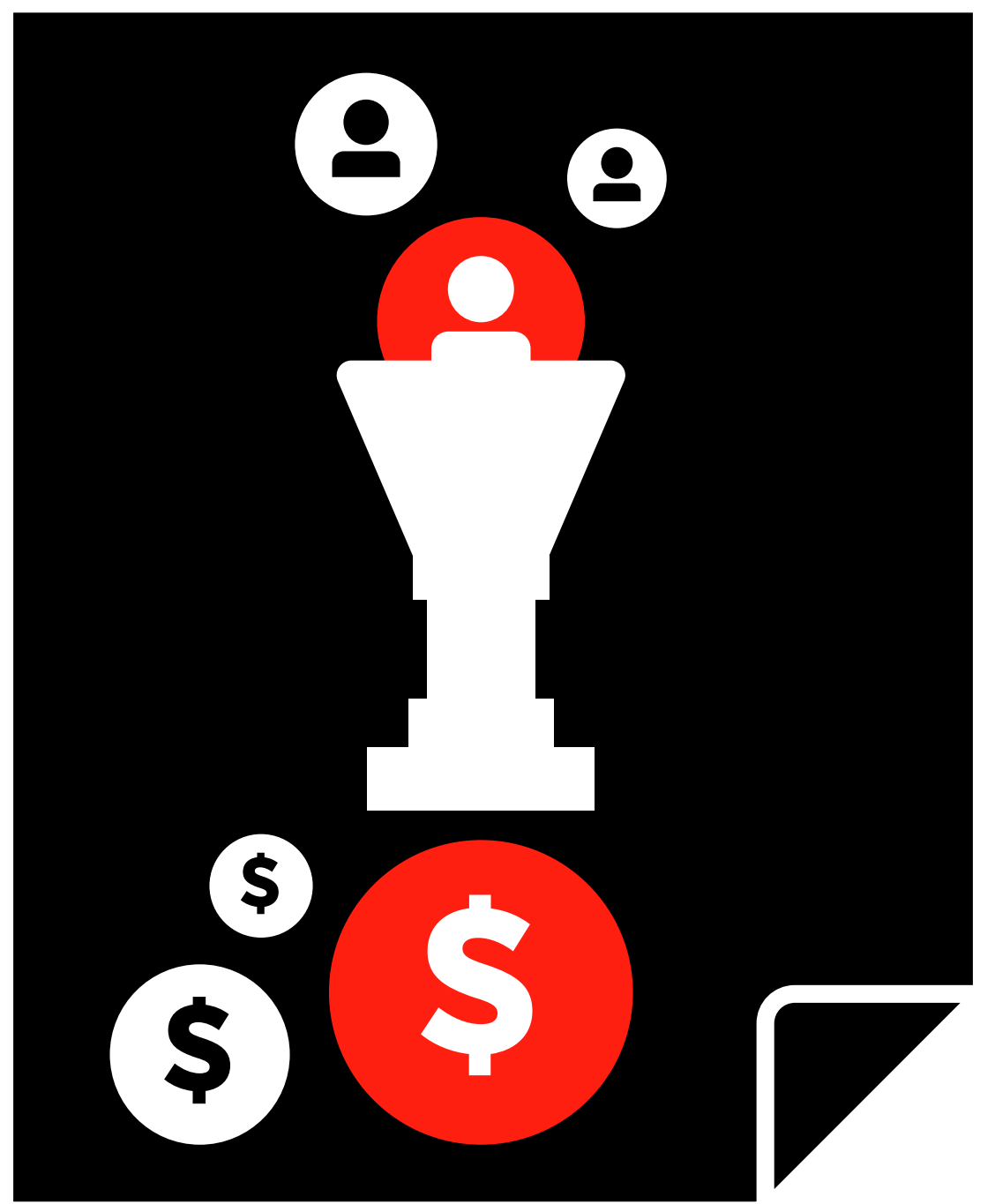
»You need to focus on quality, and that's where a program like Microsoft Dynamics 365 can help. Using its many data points, you can quickly determine the relevancy of a lead. By integrating the system with your company website, it can register when the lead has done enough to go from an MQL to an SQL,« says Gitte Højgaard Mouritsen, Marketing Lead at AlfaPeople.

The advantage from a management perspective, according to Højgaard Mouritsen, is that it becomes much easier to make more sales and better sales. Ideally, a relationship with a customer shouldn't just end after a sale. That's why there's a lot of value in creating a coherent customer experience across sales and marketing that doesn't just nurture new potential customers but also retains and expands upon existing customer relationships.

»A customer should be someone with whom you have an ongoing relationship that can be continuously nurtured so that it leads to additional sales or maybe even a whole new sale,« she says.



06



Do you have a visible overall pipeline that includes reporting?

Do you have a visible overall pipeline that includes reporting?

- 1** ☐ No one from marketing or sales has an overview of the pipeline or reports on it.
- 2** ☐ Marketing and sales share pipeline information and work together to create more leads.

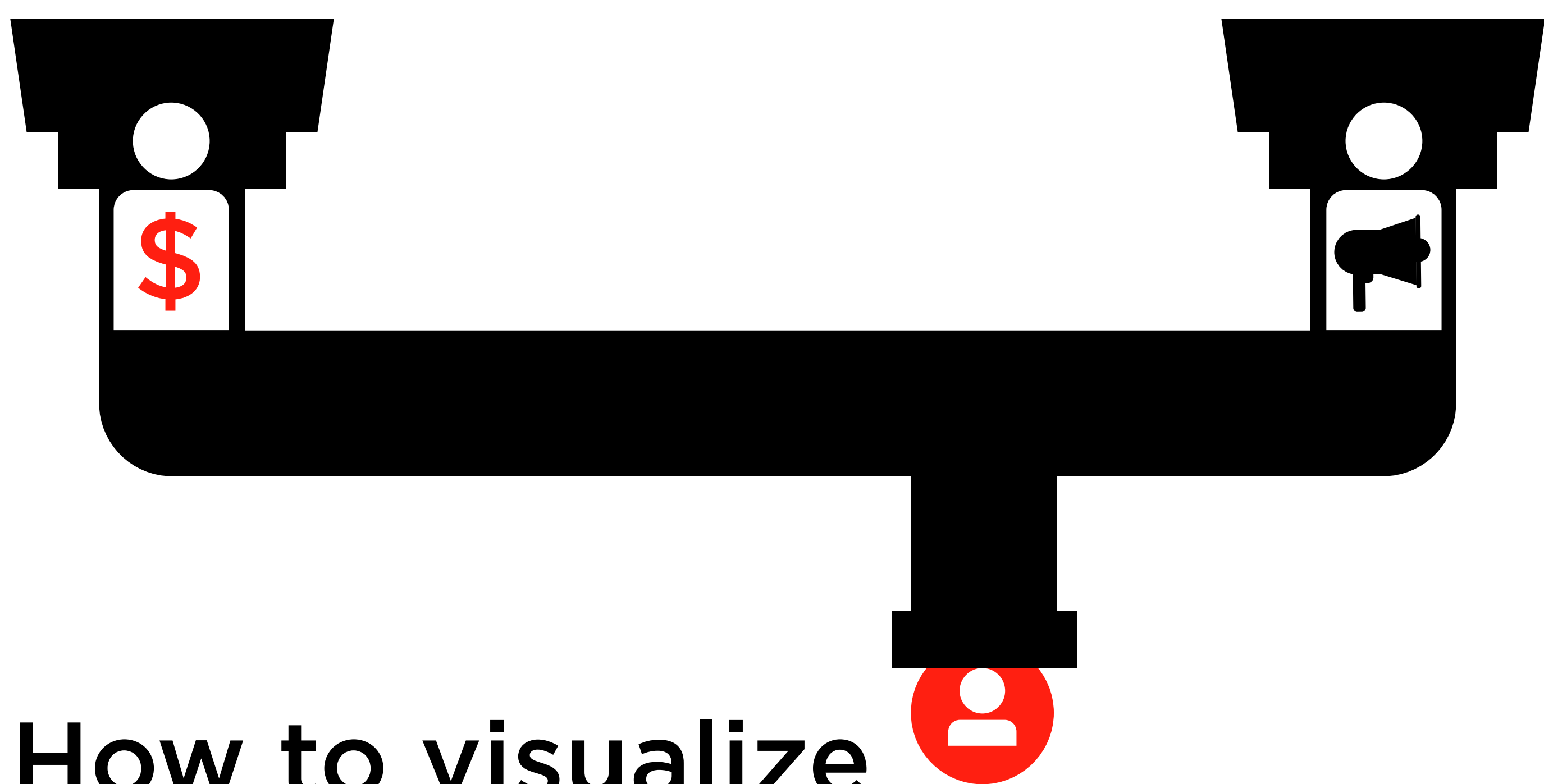
What does my answer reveal?

If there is no formal reporting on the pipeline, there is no overview of where the company is headed. A lack of pipeline reporting also indicates that sales and marketing are not working together effectively. When pipeline information is being shared and marketing and sales are working together to create more leads, the two departments have a good collaboration.



It's very important – not only for the sales and marketing departments, but also for management – that there is an overview over the sales pipeline as well as frequent reporting on it. When a company can track the entire journey from lead to customer, it provides invaluable data on marketing's value creation, Gitte Højgaard Mouritsen, Marketing Lead at AlfaPeople, explains.

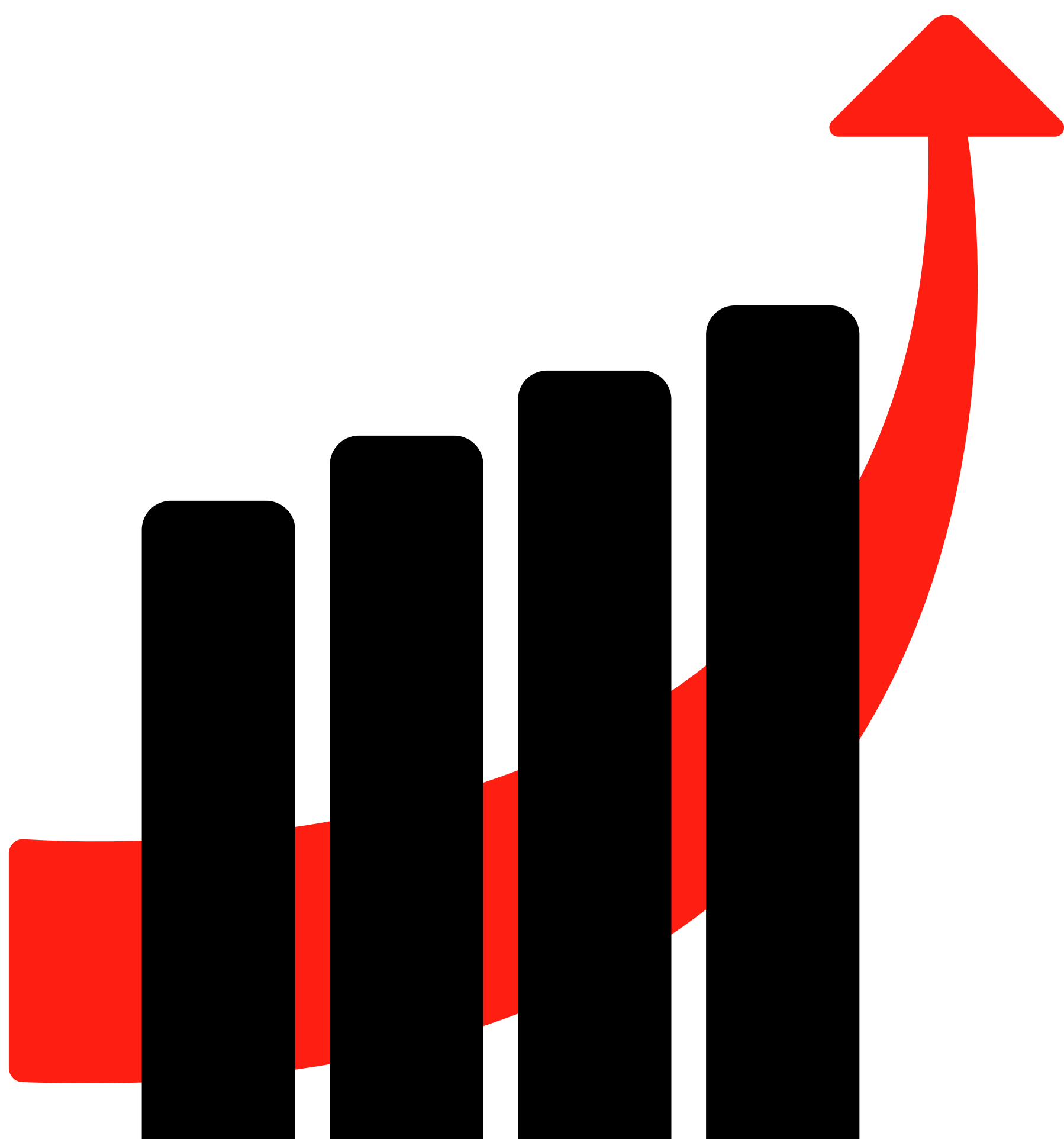
»Marketing will naturally only be involved in the first part of the pipeline before sales takes over. But sales can provide feedback on which types of communication are needed, and that is very valuable,« says Højgaard Mouritsen.



How to visualize and report on the overall pipeline

The individual pipelines of sales and marketing should be integrated into a common pipeline so a lead can be followed from the very first time they come in contact with a company until they become a customer. If you measure the journey through initial contact all the way through to a completed sale, you can determine the value of your marketing activities.





A CRM system like Microsoft Dynamics 365 can be a helpful tool in creating visibility, but it's not the only part of the solution. In order to create a single shared pipeline, the two departments must work together to determine:

- An overall goal that sets concrete targets for the number of SQLs that marketing delivers to sales as well as how many successful sales need to be closed.
- A service level agreement (SLA) that establishes procedures for how quickly a sales qualified lead should be contacted by the sales department.

»The advantage of having one shared pipeline is that it gives management a clear overview of the marketing and sales opportunities and allows them to adjust strategy in one direction or the other. They're able to see what works and what doesn't and where extra resources are and aren't needed,« says Gitte Højgaard Mouritsen.



07

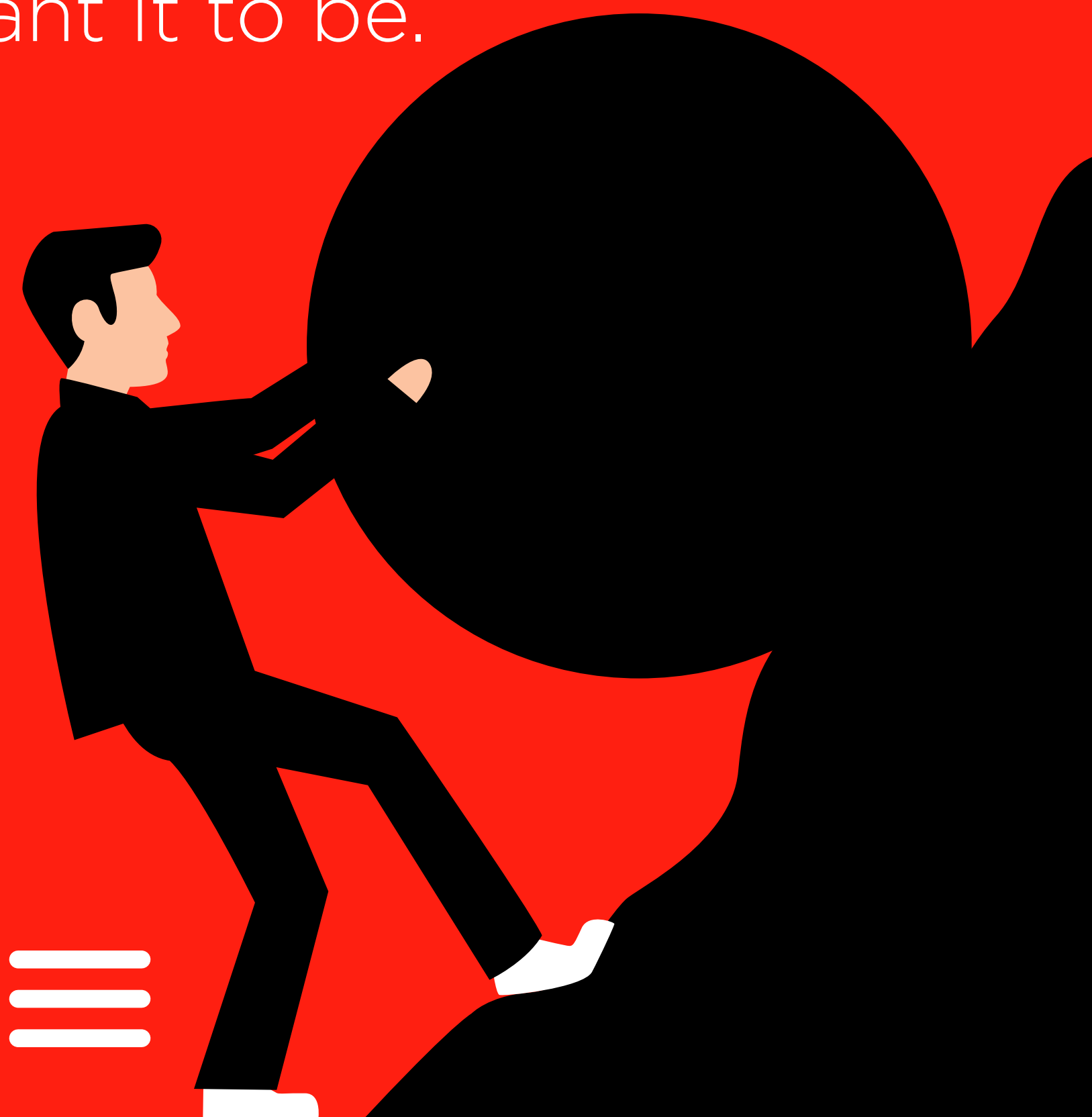
How is the relationship between the two departments?

How is the relationship between the two departments?

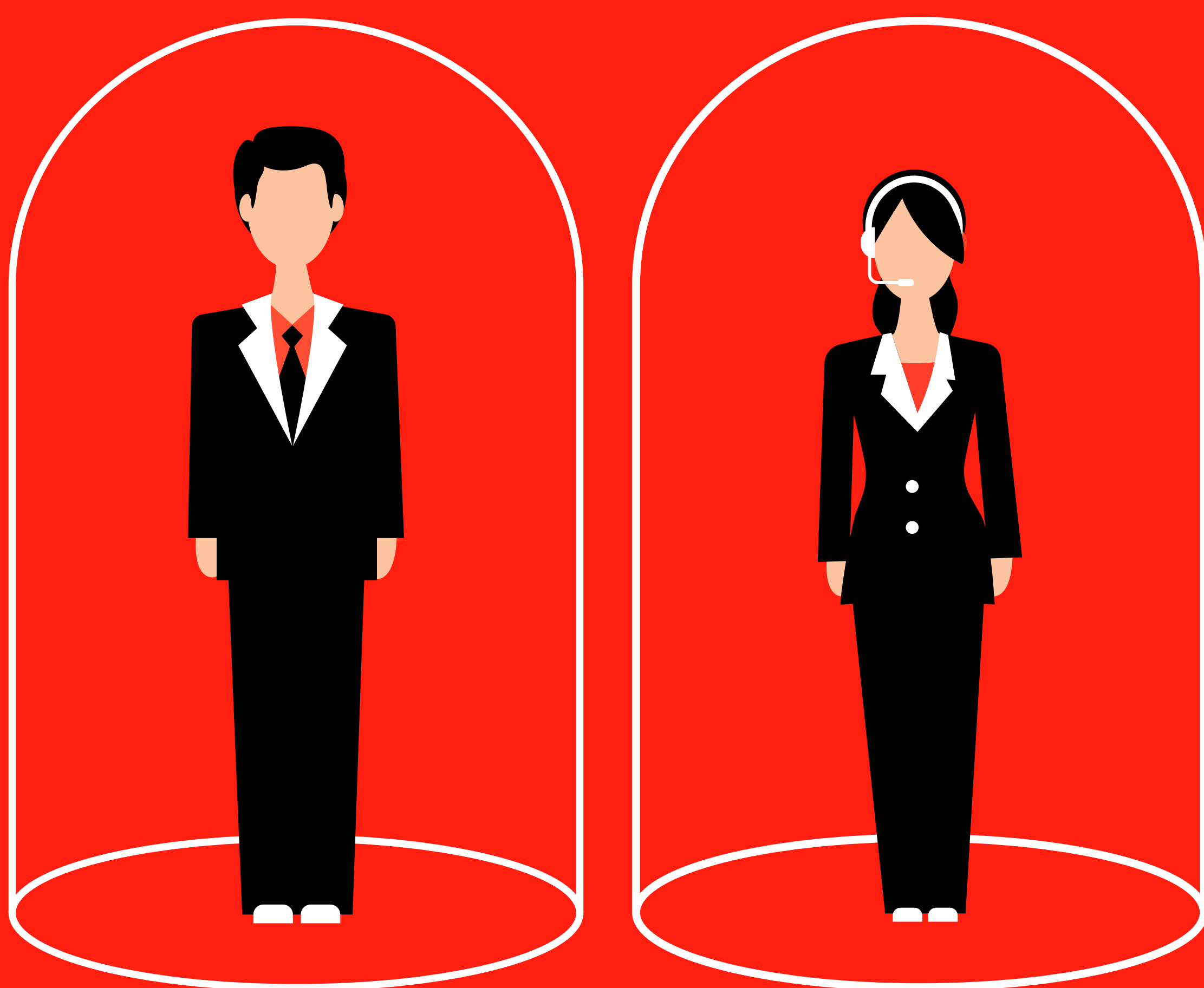
- 1 ☐ Finger-pointing and power struggles are common.
- 2 ☐ The departments have a shared culture that rises and falls together.

What does my answer reveal?

If the relationship between sales and marketing is marked by finger-pointing and fights over power and resources, aligning the two teams is going to be difficult. If, on the other hand, there is a strong shared work culture between them, the relationship is already where you want it to be.



»Internal struggles have become less and less common. I think that the departments typically work quite well together. With that said, there can still be some clashes over financial resources. Marketing has its goals and we have our own in sales, so sometimes things still feel a bit siloed,« says Paw Steffensen, General Manager at AlfaPeople.



How to improve the relationship between sales and marketing

Any conflict between the two departments should be eliminated. For far too long and in far too many companies, sales and marketing have operated as two independent initiatives. At some companies, the two teams might not even interact on a daily basis. This separation can unfortunately cause misunderstandings and distrust. When that happens, you risk missing out on valuable data, practical insights and growth opportunities.



According to Paw Steffensen, it's important for management to establish overarching KPIs instead of just separate departmental KPIs.

»There needs to be a mindset change within the company. There should be a guiding principle that ensures that everyone is on the same page. Establishing some good shared KPIs is a great place to start,« Steffensen says.

This will allow management to establish a shared culture, which is important for both the company's performance as well as the satisfaction of its workers, he adds.

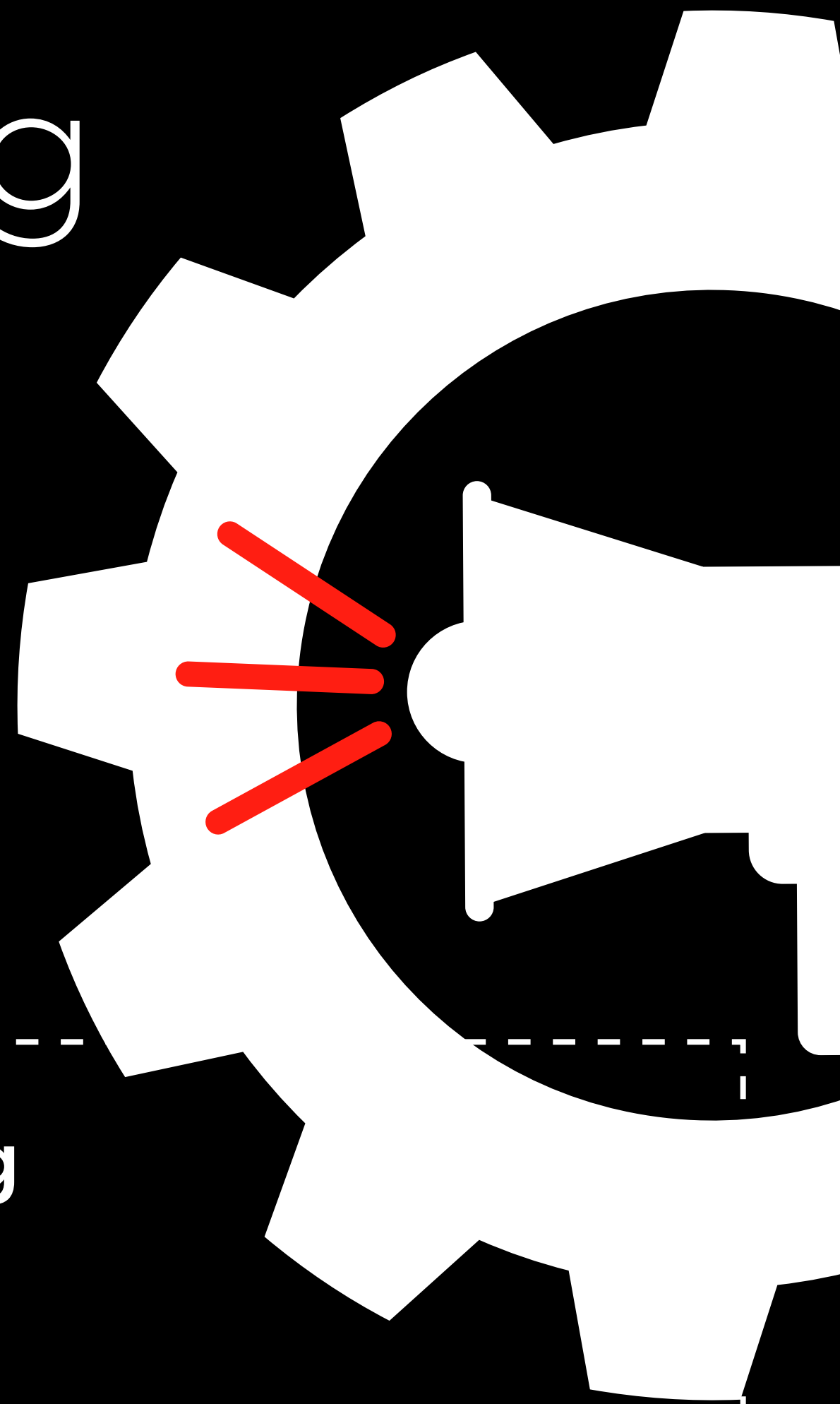
»You don't want a company that is driven by individual ego trips, but rather one in which everyone pulls together. If the workplace culture improves, workers will perform better and remain in their jobs longer,« says Paw Steffensen.

The implementation of a CRM system like Microsoft Dynamics 365 can help improve the relationship between marketing and sales. Data that shows a customer's interactions with marketing can help sales make smarter decisions. At the same time, sales can easily provide data to marketing that helps them see what works and what doesn't.



08

Are you using a marketing automation platform?



Are you using a marketing automation platform?

- 1** ☐ No marketing automation platform. Campaigns are ad hoc and project-driven.
- 2** ☐ We have shared lead qualification, lead nurturing and closed loop reporting.

What does my answer reveal?

If your company doesn't use a marketing automation platform, the alignment between sales and marketing is likely to suffer. If you are using a marketing automation platform, it can help ensure shared lead qualification, lead nurturing and closed loop reporting, which in turn improves the cooperation and alignment between sales and marketing.



As Gitte Højgaard Mouritsen, Marketing Lead at AlfaPeople, explains, a marketing automation platform is important because it helps save time and allows for the creation of more targeted and specific efforts, such as email campaigns for downloading content.

»Marketing automation means that tasks that were previously manual now happen automatically, allowing the marketing team to use their time on additional and better activities,« says Gitte Højgaard Mouritsen.

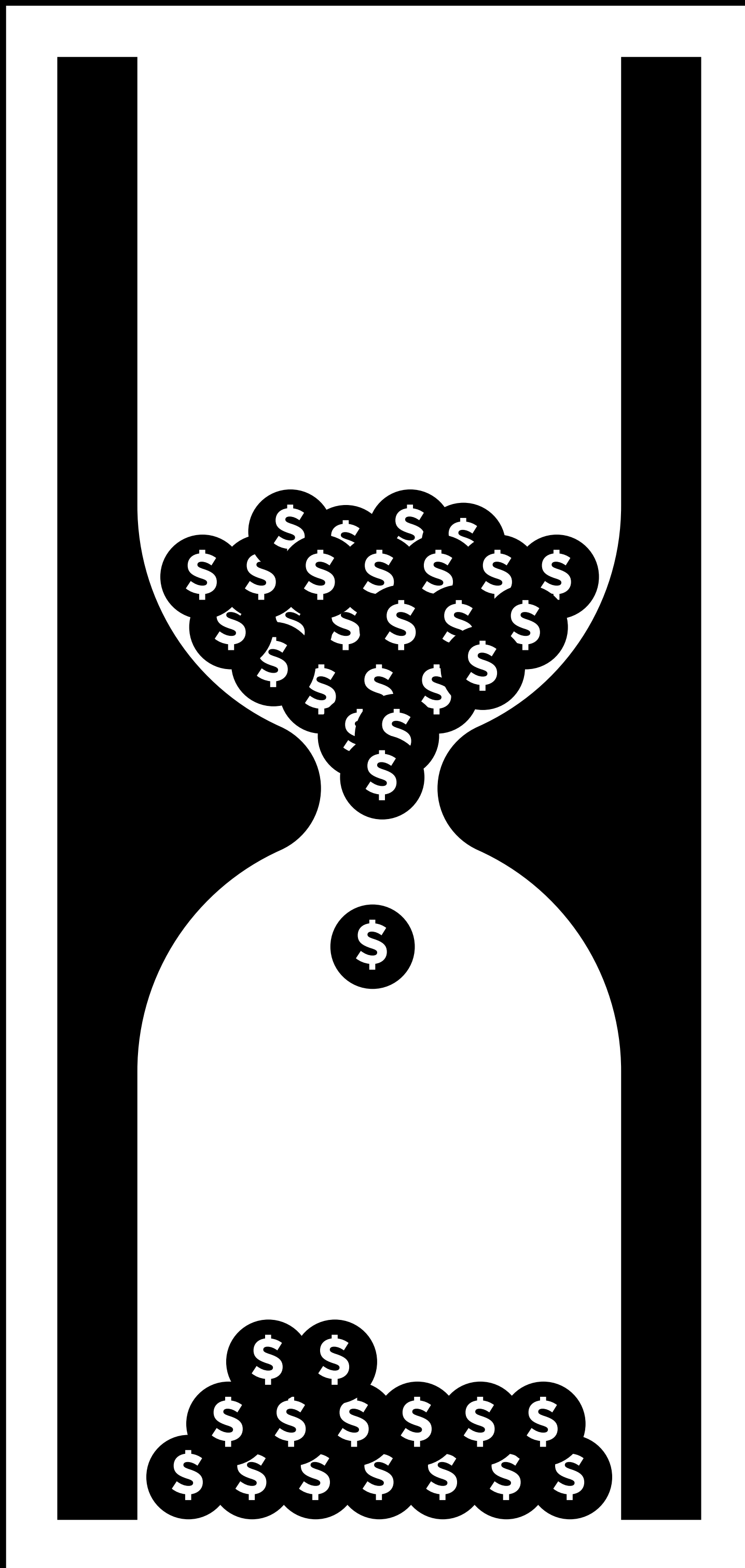
How to take advantage of a marketing automation platform

The objective of marketing automation is to automate all of your marketing activities, such as email newsletters and social media posts. The aim is to ensure that you communicate on all of the relevant channels and deliver messages to your customers that meet their needs.

Marketing automation also serves as an important link between marketing and sales because the automated processes are often what nurture leads until they can be sent over to the sales department.

The marketing module of Microsoft Dynamics 365 has everything you need to get started with marketing automation.





»Microsoft Dynamics is a complete marketing automation platform that can strengthen your communication and create customer journeys that will nurture leads until they are ready for sales,« Gitte Højgaard Mouritsen says.

Marketing automation also makes it possible for management to implement a digital marketing strategy that doesn't require each and every step to be carried out manually. It also creates additional value in the form of data that is based on customer needs. This makes it much easier to create campaigns that work. In short, marketing automation saves both time and money.



Do you have access to data and data management?

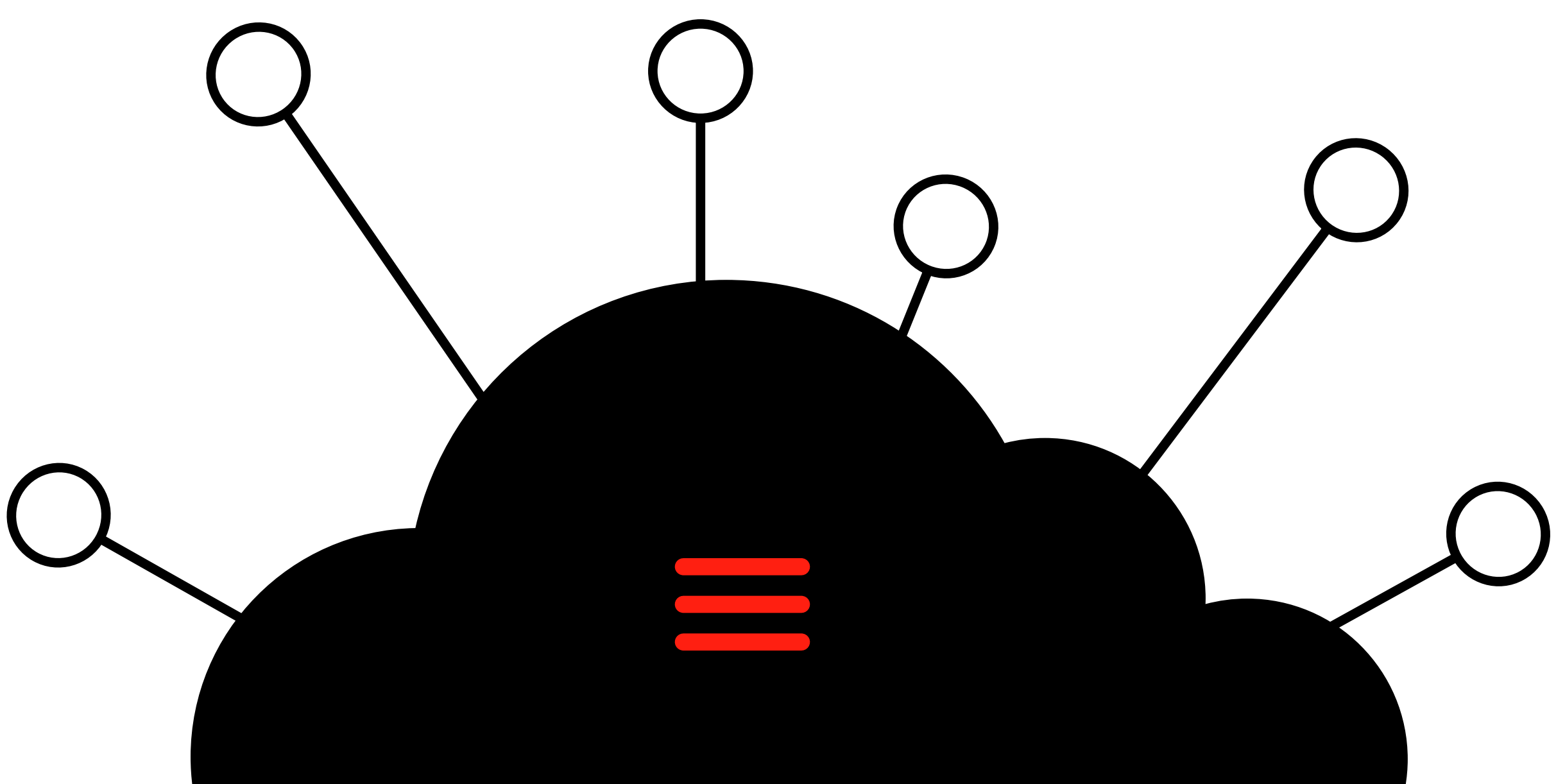
Do you have access to data and data management?

1 ☐ Data is stored in different locations and different systems and is hard to find.

2 ☐ Sales and marketing have a shared overview of customer data and automated processes.

What does my answer reveal?

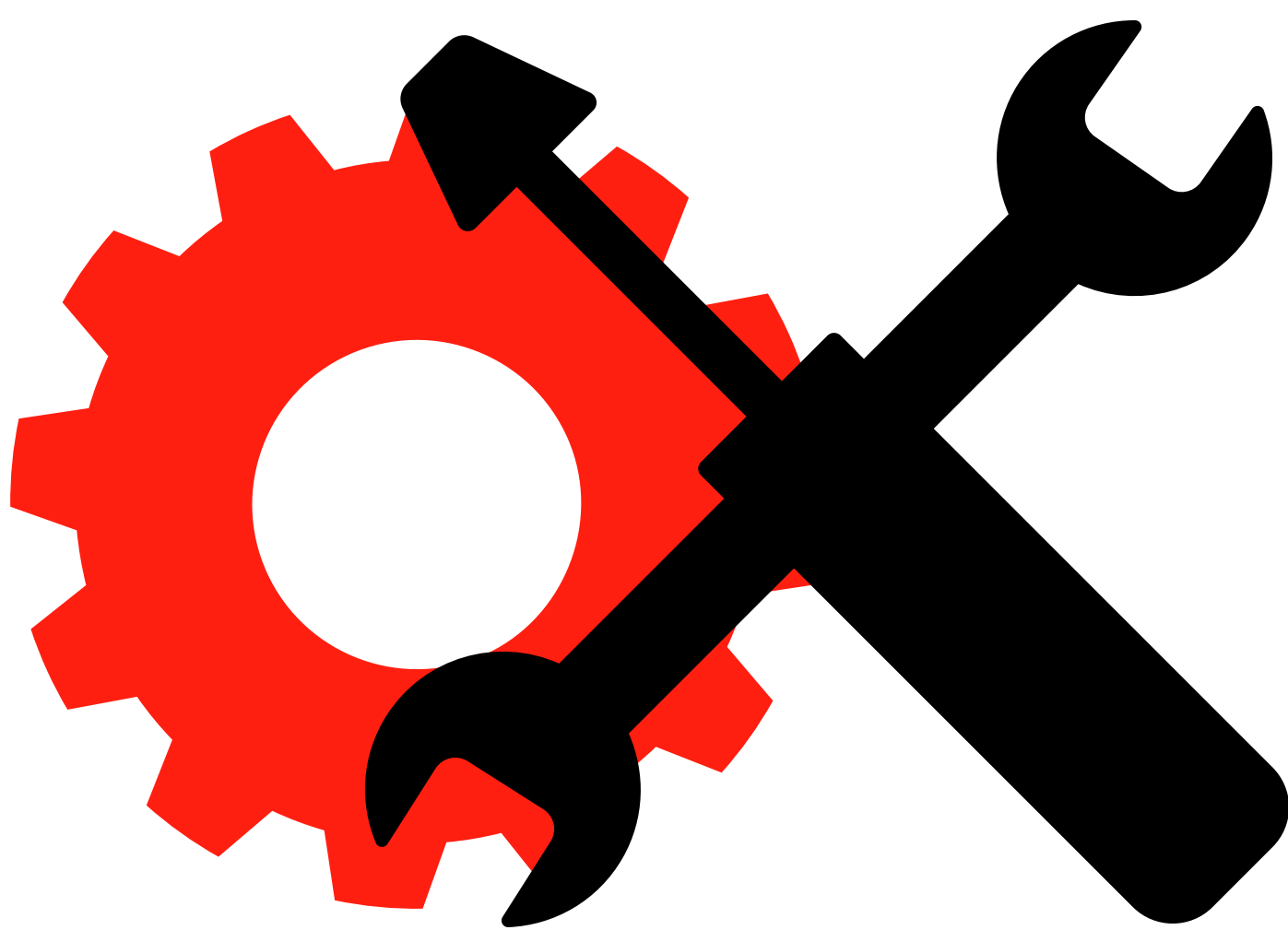
If data is stored in various locations across different systems and folders, it is difficult to find. This hampers the ability of sales and marketing to share the data that is essential for creating alignment between the two teams. If, on the other hand, the two departments have a complete overview of customer data and utilize automated processes, the alignment between sales and marketing at your company is already good.



Paw Steffensen, General Manager at AlfaPeople, says that outdated software solutions and platforms that cannot communicate with each other can create a burden for any company. This can result in ineffective processes and a lack of data insight. When all is said and done, it can hurt the company's bottom line.

A company can quite easily end up using a number of different systems over the years. Employee turnover and changes in leadership and strategy often create a hodgepodge of solutions. But relying on several different processes and systems makes it difficult to work effectively and use data properly.

»If you don't have an overview of your data, you'll never unlock its value,« Paw Steffensen says.



How to ensure access to data and data management

Using a CRM system, such as Microsoft Dynamics 365, to save all important customer information in one place ensures that your company has access to data, effective data management and proper alignment between sales and marketing.



»There are various ways to go about it. Microsoft Dynamics 365 is fully customizable, so you can set it up to meet your specific needs. Instead of having data spread across various systems and having no real overview, you are able to get the full value of your data when it is all in one place,« says Paw Steffensen.

But it's not enough to simply own a good CRM system. You have to use it correctly if you're going to maximize your investment and improve the quality of your data. It's all about establishing performance metrics, processes and KPIs that keep everyone on the same page.

Doing so gives management a better overview of the company's overall performance as well as the performance of the individual departments. It supports the establishment of commercial KPIs and ensures a common frame of reference for sales and marketing, putting them in better alignment.



Next step: Can Microsoft Dynamics 365 help you?

If you've primarily selected option 1 as you answered the questions at the beginning of each chapter, you should take a closer look at the relationship between sales and marketing.

If you mostly chose option 2, the relationship is probably already quite good.

That doesn't mean, however, that there isn't room for improvement or ways to make your existing processes more efficient.

You are probably familiar with Microsoft Dynamics 365 and may have even already implemented part of the CRM system.

But how can Microsoft Dynamics 365 help you ensure better alignment between your sales and marketing departments?

Microsoft Dynamics 365 contains several business applications with CRM functionality that can be used on their own or together to help you achieve your goals. Below we highlight two that can help sales and marketing efficiently work together toward the same goals.



Microsoft Dynamics 365 Sales

This CRM system supports the entire sales process. It gives an overview of your customer's needs. Its recommended actions and insights help salespeople make more and better sales. And it can be effectively linked with Microsoft Dynamics 365 Marketing to ensure that the two departments exchange data and experiences, which will improve the company's overall performance.

Microsoft Dynamics 365 Marketing

Marketing professionals use this CRM to find and nurture potential customers and thus enhance the sales process. It can handle the entire marketing process, including content management and personalized customer journeys. And because it is a part of Microsoft Dynamics 365, the data can easily be shared with sales so that they can see when a lead is ready to make a purchase. This is valuable information.

If you'd like help implementing all or parts of Microsoft Dynamics 365, get in touch with AlfaPeople today.

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CONTACT US

We are ready to answer all of your questions.





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