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Bridging the Marketing–Sales Chasm

A common, fundamental disconnect between getting the message out and closing the deal can lead to lost sales opportunities. But it doesn't have to.

by **Barbara Sullivan and Graham Ericksen**

Marketers are always looking for ways to get their messages to the right customers. They constantly analyze their media spend and channel strategies, and devote untold sums to awareness campaigns. But many companies are not reaping the full rewards of their efforts because they fail to deliver the tools and support that their sales forces need to close business deals.

What's going on? There is often a fundamental disconnect between marketing and sales. Marketers, both a company's own marketing department and the agencies it works with, don't pay enough attention to the point where their efforts should hit home, the moment of purchase decision. That is where sales support is absolutely crucial. But by ignoring the motivations and interactions with a company that drive customers to choose one product over another, marketers are missing the opportunity to uncover critical insights that can dramatically affect results.

Marketers, then, must understand how purchase decisions are made. Using such tools as interviews and ethnographic research, marketers can gain deeper understanding of customers' decisions, including the context in which they are made and the elements that contribute to their conclusions. This helps marketers do a better job developing sales materials that deliver the information customers need in the way they want to receive it. The result? Shorter selling cycles, better close rates, greater brand consistency, and higher adoption of sales tools by the field sales force.

Trapped in a Sales Silo

Rather than treating sales support as an afterthought at best, marketers should incorporate it into their overall strategic planning. Many large organizations regard tactical sales communications as necessary evils instead of critical tools. They tend to devote small budgets to these communications, separate from the overall marketing spend, and make them the purview of managers with narrow responsibility. This approach is particularly dangerous — and dangerously prevalent — in scenarios in which decisions require more than one decision maker; take place over multiple interactions and channels of communications; and involve complicated products whose value is intangible, such as the decision to change benefits providers or enhance a retirement plan.

The traditional marketing, branding, and advertising agencies working for these organizations often exacerbate the problem. By organizing themselves around delivery channels, such as print, Web, and television, agencies also ignore the gap between marketing strategy and sales performance. In addition, top creatives and strategists simply don't want to work on less glamorous and often more substantive communications, such as sales presentations, sales sheets, online demos, welcome kits, and monthly statements to customers. Not only is sales support less sexy than a big ad campaign or a commercial, but it commands smaller budgets and faster turnaround times.

The tactical nature of these sales communications also means denser product information, which in turn

Barbara Sullivan

(BSullivan@sullivannyc.com) is managing partner and founder of Sullivan, a full-service communications strategy and design firm with offices in New York City and Washington, D.C.

Graham Ericksen

(GERicksen@sullivannyc.com) is a creative director at Sullivan, where he oversees all content development and information architecture.

requires a higher level of industry expertise, understanding of the audience, and knowledge of the sales process. In short, many agencies see these communications as more labor and less reward than a major campaign or a Web site. When agencies do take on a project focused on sales communications, their team may not have the skills required to see it through.

Delving into Decision Making

Raising the level of sales support requires that companies recognize two facts: 1) successful selling derives not just from products but also from behaviors; and 2) the elements necessary for successful selling may dictate the need for fundamental changes in how marketers think about decision makers. From a practical standpoint, this means companies can't start a project or campaign by just churning out printed materials or a Web site. Rather, they need to begin with a blank slate, and before even conceiving a strategy they must try to understand the behavior of the decision makers.

The process begins with interviewing and observing all the participants in a sales decision — including salespeople, customers, and prospective customers — to map customer decisions. This may include having the sales force sit in on sales meetings to see how top performers do their jobs, and soliciting their thoughts and observations in individual interviews. Next, marketers should meet with clients (and prospects), who are ultimately the end-users of the sales communications, in their homes or businesses. The methods employed should be scientific — studying the environment in which the customer works, observing the physical limitations of the office or cubicle, and noting how individuals process and store information.

Although this data-gathering phase can seem daunting at first, it takes only a few interviews to identify trends among decision makers, many of whom are happy to talk about how they make choices and to sug-

gest ways to make the sales support communications more useful and relevant.

To see how the information gathered during this step can revamp a company's approach, consider the example of a financial institution that created elaborate materials for its sales force to use to sell its product line to stockbrokers. The full-color printed materials emphasized the prestige and reputation of the institution. Yet despite the money spent and the effort expended, the sales force and customers found the materials irrelevant.

Through ethnographic research, we discovered that the target customers, who were stockbrokers, perceived themselves to be in competition with the financial institution in other areas of their business, and wished only to present the institution to their clients in the narrowest product-oriented light possible. Furthermore, the stockbrokers preferred electronic information and were more likely to pass along electronic media such as e-mails, PowerPoint documents, and PDFs to their own clients. The glossy printed materials were a waste.

As a result of this research, the financial institution completely transformed its selling system, converting almost all of its sales materials from print to electronic formats, and shifting the emphasis from an institutional sell to a product orientation. The new system proved much more cost-efficient and nimble, letting marketers change their sales support messages as business conditions fluctuated. More important, it gave the sales teams materials that would support — not impede — sales efforts.

The Need for Clear Maps

After gathering data, the next step is to map the decision-making process. First, identify the key players involved in the decision. Describe and document exactly who each of the decision makers is and what triggers a response from each of them. You'll often find

that for more complex, high-stakes decisions, the buyer isn't a single person — it's a group of individuals with different roles and unique needs. Although identifying the members of this group complicates the analysis and the corresponding recommendations, it's also a critical step in building targeted sales materials.

Second, note when and how information flows through decision makers, and whether it's via e-mail, over the phone, or in person. The research will reveal whether all decision makers need the same information or different perspectives require different approaches. Using these interviews and research, develop a decision map that shows the progression through the classic stages of the buying process, from interest and intent to purchase, transaction, and reaffirmation. For example, while applying this approach at one insurance company, we learned that the marketers needed to modulate their messages and communications to influence two distinct audiences with different needs: directors of human resources at large corporations and independent brokers who sell products from a variety of insurance companies.

In the final step, using the decision map and the accumulated understanding of the needs and preferences of each decision maker, companies can then filter out extraneous information and hone communications to deliver precisely what the customer wants to know, in the right form, at the right time. The result is highly efficient sales communications tailored specifically in form and function to match the needs of their targets.

For example, one electronic media company distributed its sales materials electronically, which seemed like a reasonable choice. Through observation and analysis, however, we learned that by relying solely on electronic communications, the Web-based company was handicapping its sales process. Why? Its clients generally relied on group decisions, and the decision makers wanted hard copies in hand. By creating electronic versions only, the company forced its clients to print out the materials, which clients were reluctant to do, and it therefore lost control over the presentation. Even though the product the company was selling was electronic, the preference at the point of decision was for printed materials.

Going into the Field

The ethnographic approach isn't for beginners. It requires seasoned marketers to lead the information gathering and analysis, and media-agnostic creatives who can translate those findings into compelling communi-

cations. More than any other marketing materials, sales communications integrate content and design, which means companies also need a team of writers and designers with the industry experience and creative chops to bring the strategy to life, without losing sight of the end users. The creative team must also have the range to work across media so it can deliver communications exactly the way customers want to receive them.

After companies have developed the communications, they should go back to the sales force for testing. Although this undoubtedly lengthens the process, the communications are, after all, sales tools that make sales more effective. Including sales in the process makes all the difference.

For companies that refocus their strategic communications, the results of applying this rigor can be tremendous: Not only will they transform necessary evils into sales vehicles, but they will also finally connect marketing strategy with sales force needs, which can be the beginning of a great relationship. +

Resources

Edward Landry, Thomas Ripsam, and Bart Sayer, "Is Your Sales Force Adaptable?" *s+b Leading Idea*, 4/24/2007: Five steps to revamping a sales force in the face of a shifting consumer landscape. www.strategy-business.com/leadingideas/li00023

Edward Landry, Andrew Tipping, and Jay Kumar, "Growth Champions," *s+b*, Summer 2006: An analysis of the most successful marketing organizations, based on research from Booz Allen Hamilton and the Association of National Advertisers. www.strategy-business.com/article/06206

Geoffrey Precourt, ed., *CMO Thought Leaders: The Rise of the Strategic Marketer* (strategy+business Books, 2007): This book offers insight from 15 top marketing leaders on the current and future direction of their field. www.strategy-business.com/cmoreader

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645 Madison Avenue, 17th floor
New York, NY 10022
www.sullivannyc.com
Tel (212)888-2881
Fax (212)888-2766

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