



THE 2018

**B2B**

**MARKETING**

**&**

**SALES**

**ALIGNMENT BENCHMARK**



# TABLE OF CONTENTS

- Introduction** ..... 3
- Chapter 1: Key Findings and Methodology** ..... 5  
Tweetable takeaways and detailed survey participant information
- Chapter 2: Thoughts on Alignment** ..... 8  
How stakeholders see the big picture
- Chapter 3: Opinions of Marketers and Salespeople** ..... 12  
Thoughts on content, customer experience, and more
- Chapter 4: Alignment According to Leaders and Doers** ..... 23  
How opinions differ from top to bottom
- Chapter 5: Alignment at Scale** ..... 26  
How problems grow as companies do
- Chapter 6: How Far We've Come** ..... 29  
Comparing today's findings with those of 2016
- Chapter 7: The Future of Alignment** ..... 32  
Habits of top performers and the impact of technology
- Chapter 8: Your Next Steps** ..... 35  
Tactical resources to build alignment at your organization
- Bonus! Insights From Experts** ..... 37



# Marketing and Sales:

## *Friends or Foes?*

---

Marketing and sales have long maintained a complicated relationship. Technically on the same side but with largely separate goals, metrics, and points of view, these two departments often form a tense alliance. Both know the other is vital to the success of the business, but neither feels fully supported or understood.

This fragile union has been sufficient for each side to survive—and even thrive—for many years, but what got us here won't be enough in the Age of the Customer.



### **The Buyer's Journey Has Fundamentally Changed**

*An explosion of digital channels has made information plentiful and easy to find, forever shifting the balance of power between buyers and brands and allowing consumers to wrest control of the wheel to direct their own buying journeys. It's also raised consumer expectations. Prospects no longer want to hear about what you offer—they want to hear that you understand them.*

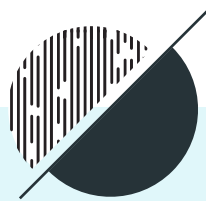
To keep up with the rising expectations of personalization, today's B2B companies must focus on addressing buyers' pain points, not on selling their own solutions. This customer-centric model requires all teams to work together in order to provide a consistent, outstanding customer experience—starting with marketing and sales.



# Great marketing–sales alignment is no longer an option.

With this in mind, we decided to find out what today’s alignment landscape looks like. Are sales and marketing teams rising to the challenge? Or are they falling back into the silos and suspicion that have too often defined their relationship?

We hope you’ll use these findings to understand how your teams compare to their peers, as well as to determine actionable next steps you can take to bring alignment to your organization.



*“Marketing has invested heavily in becoming more customer–centric. But despite these investments, they have yet to change how they operate internally—how their own people organize and collaborate to produce the customer experience.”*

— Toby Murdock  
CEO and Co-founder, Kapost





CHAPTER 1

# Key Findings & Methodology

*Tweetable takeaways and detailed survey participant information*



# Key Findings

---



## Commitment to Concepts, Not Tactical Action

More than half of marketers and salespeople say key stakeholders in their organizations agree on the importance of consistent messaging, but a full one-third don't have a standing meeting.



## Confusion Over Alignment

Two-thirds of marketers and salespeople agree that their teams are aligned, but fewer than half believe sales uses marketing content to its full potential.



## Who Owns Customer Experience?

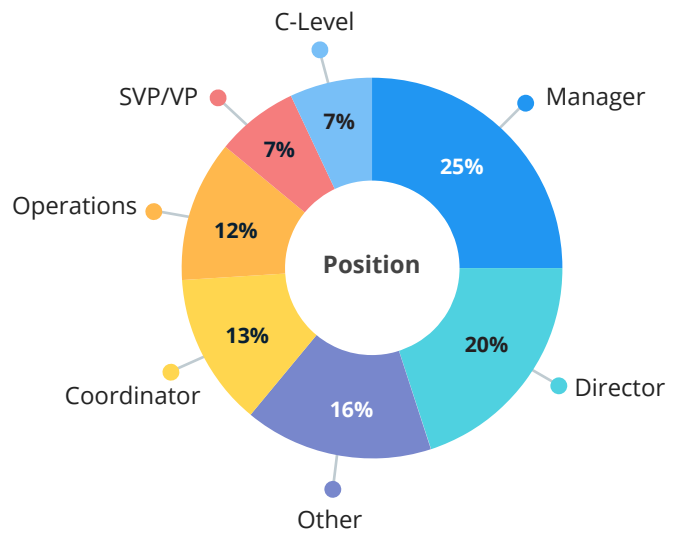
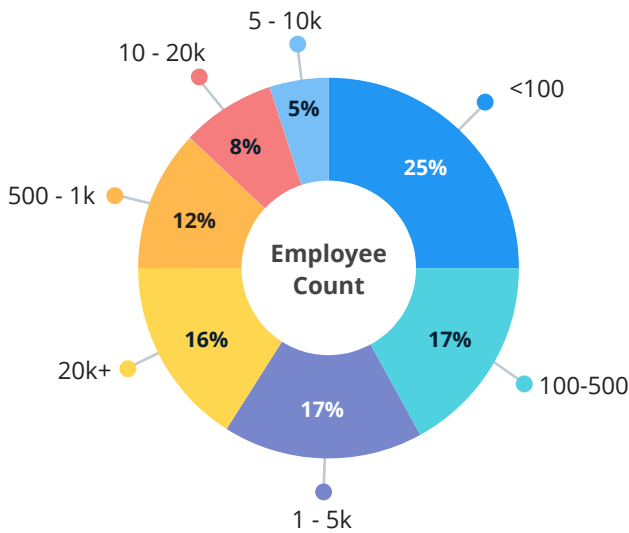
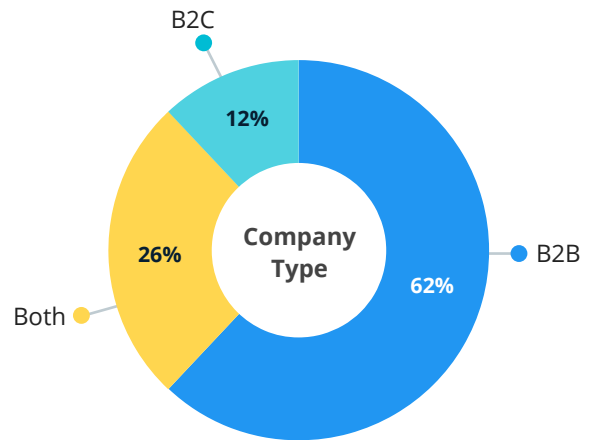
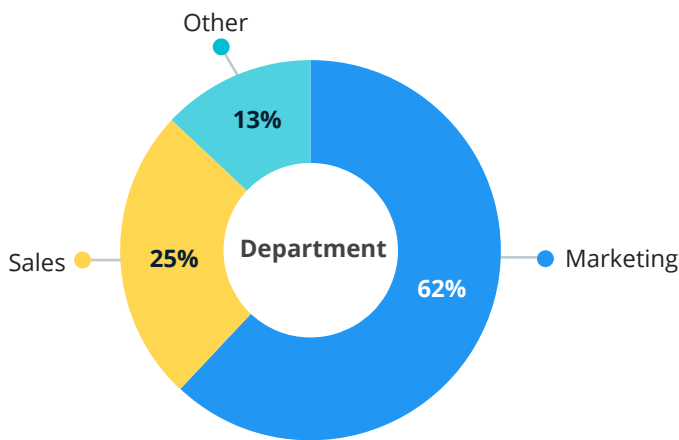
No one can settle on a group with ultimate responsibility. Answers range from sales to marketing to customer support, but the future of CX may prove everyone right—and wrong.



# Methodology: Who Took Our Survey

In a study about alignment, it was important to hear from both marketing and sales—groups whose success depends closely on one another, yet who so often fail to see eye to eye.

Our nearly 300 survey respondents represent a variety of backgrounds, working for companies big and small and serving as everything from coordinators to CMOs.





CHAPTER 2

# Thoughts on Alignment

*How stakeholders see the big picture*

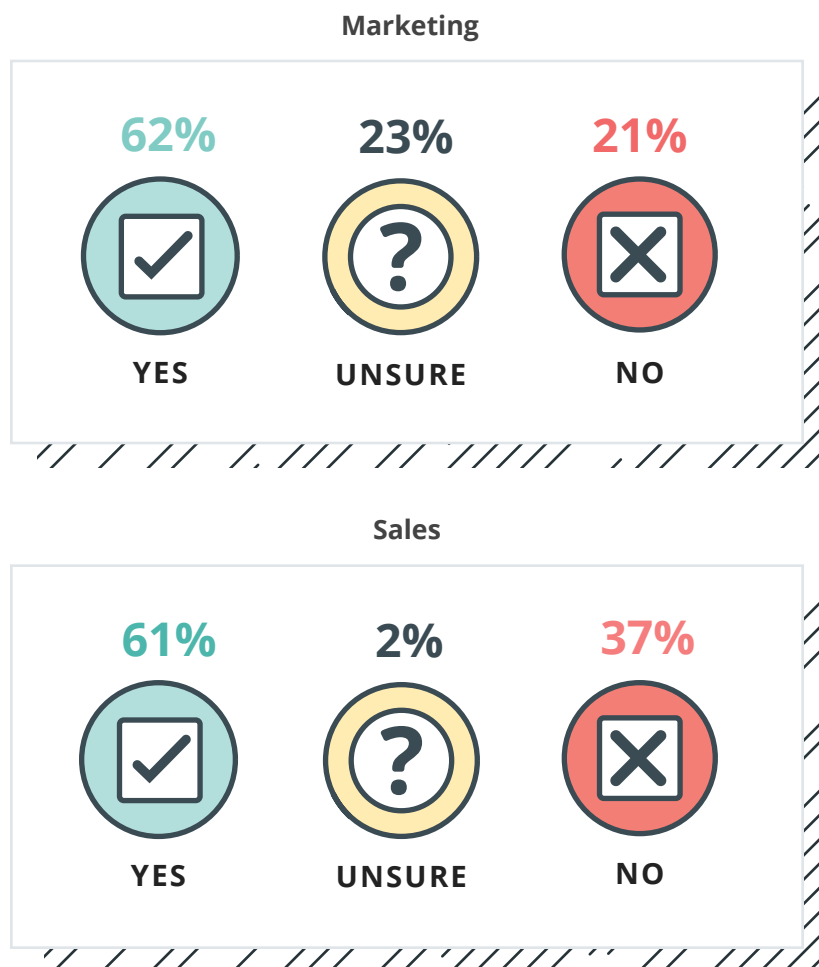




# What Matters Most

The first step to agreeing on the details is aligning on the big picture. And we have good news! The majority of stakeholders agree: consistent messaging is a prerequisite for great customer experience.

*Do key internal stakeholders agree that inconsistent messaging across the buyer's journey has a negative impact on customer experience?*



## Diving In: When Stakeholders Don't Agree

Securing agreement on the importance of consistent messaging is a crucial first step toward alignment, but those who said it wasn't important or were unsure overwhelmingly identified marketing-sales alignment as a top barrier to their success.



And of course, these stakeholders are right about the importance of a consistent message. Prospects should know what your company is all about from the first blog post they read or webinar they watch. Their understanding should deepen, not change, as they engage with sales.

When messaging is consistent, sales wastes less time nurturing leads who ultimately jump ship when the hand-off between marketing and sales brings with it a sudden shift in narrative.

## In companies that do not prioritize consistent messaging, just 33% of marketers report knowing what content sales needs.

Without an agreement around the importance of consistency in messaging (and therefore, in content) the fight for alignment is lost before it begins. With stakeholders who buy in, organizations are one step closer to making marketing-sales alignment a priority for everyone.



*“Sure, content is the whitepapers that we write and the banner ads we create. But it’s also the meat of the conversations that are happening between sales and prospects.”*

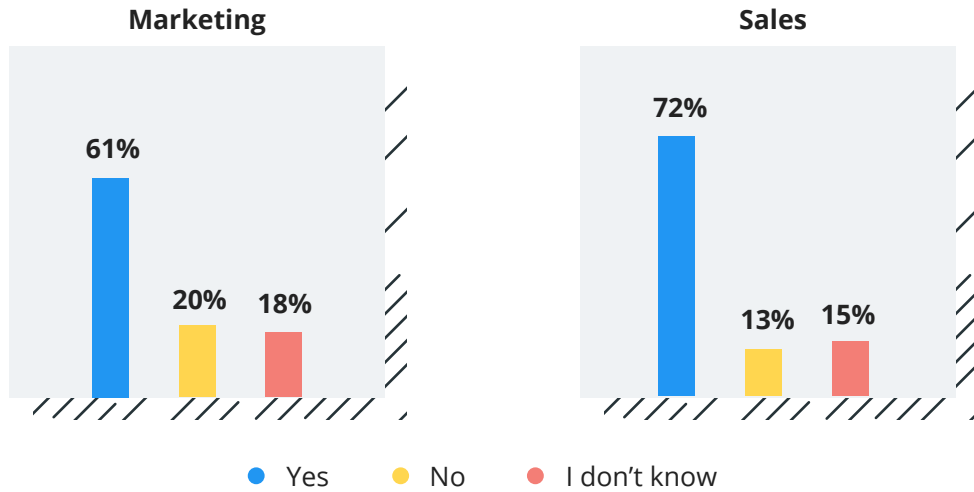
*– Wil McLean  
Director of Content, Ciena*



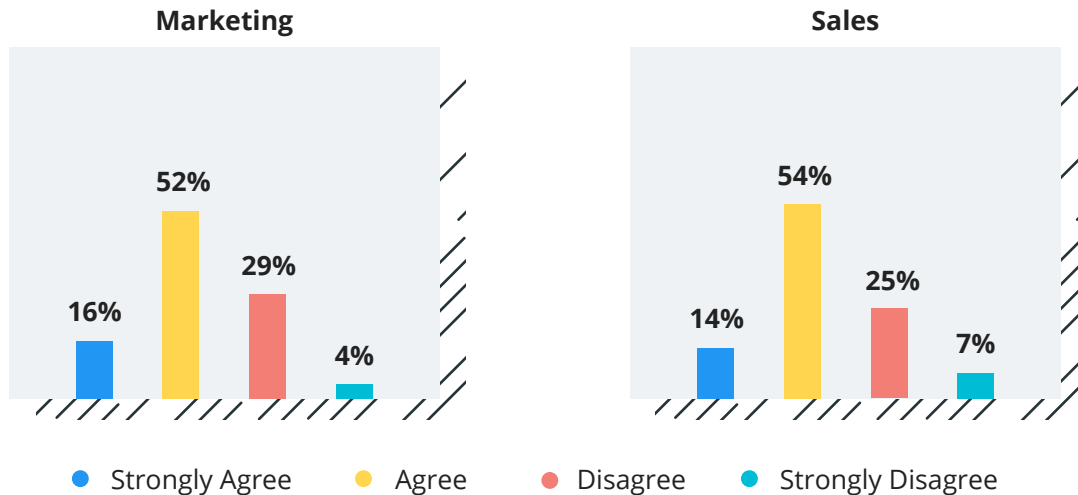
# Too Good to Be True?

Taken at face-value, our findings tell an optimistic story.

*Has your organization adopted a customer-centric approach to marketing?*



*Our marketing and sales teams are closely aligned.*



## Not so fast.

Though respondents self-reported their organizations' success, their answers to other, more targeted questions told a very different story. It soon became apparent that marketers and salespeople aren't entirely sure what modern alignment looks like.





CHAPTER 3

# Opinions of Marketers & Salespeople

*Thoughts on content, customer experience, and more*

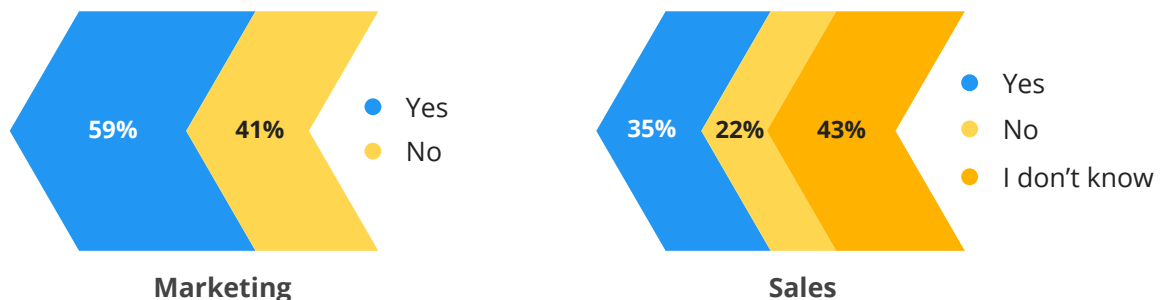


# He Said, She Said

Are marketers enabling their sales teams? Depends on who you ask.

Nearly 60% of marketers confidently report that they know what content their sales teams want them to create. Sales, on the other hand, isn't so sure.

*Does marketing know what content the sales team would like them to create?*



The majority of sales respondents indicated either that marketing didn't know what sales needed or—perhaps more alarmingly—had no idea whether marketing was aware of their needs at all.

This disconnect between content creators and consumers hints at a dangerous dynamic: one group—sales—sees a problem, while the group with the power to solve it—marketing—is blind to the issue at hand.

**Given these data, it comes as no surprise that:**

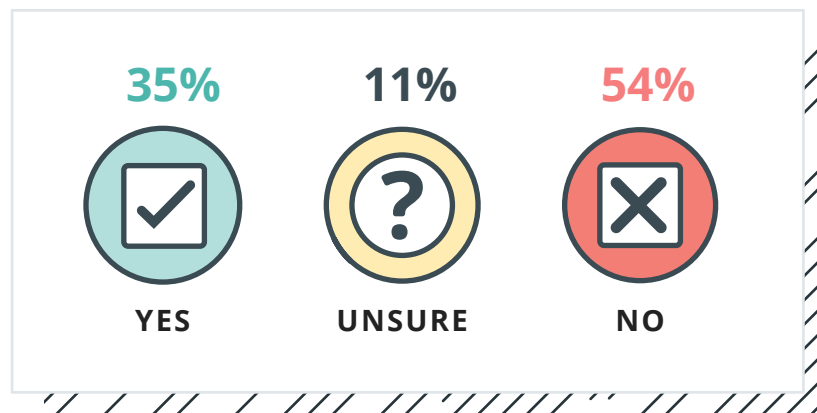


**Only 35%**

of organizations have a process for gathering ideas for future content.



*Do you have a process for crowdsourcing ideas across the organization?*



#### **Diving In: If You Don't Know, It's a No**

If employees aren't aware that their workplace has a process in place for internal ideation, it effectively doesn't. Internal crowdsourcing only works if it's visible and accessible for everyone.

#### ***Building Modern Alignment: Embrace Internal Idea Sourcing***



Soliciting ideas from other departments doesn't mean being ticket-takers. **Establishing a process** for receiving and evaluating content suggestions from salespeople and others gives marketers a formalized way to accept or reject ideas. With this system in place, marketers can **direct coworkers with ad hoc requests** to the idea queue, assuring them that their thoughts will be heard and that they'll always have **visibility into the status of their proposals**. Learn more about strategic content planning with our [Strategic Planning Templates](#).

# Do You See What I See?

Both marketers and salespeople are struggling with visibility, but marketing is more in the dark.



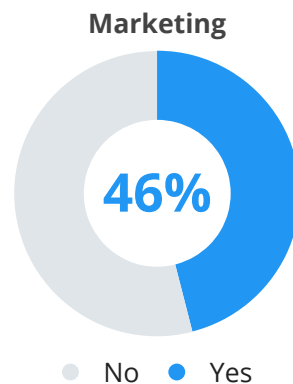
**55% of marketers**

don't know which assets sales uses most.

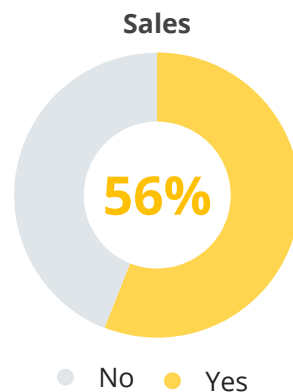
*Marketers, do you have visibility into which marketing assets are used most by the sales team?*

### Diving In: The Benefits of Visibility

Marketers with visibility are 3x more likely to strongly agree that their marketing and sales teams are closely aligned and more than twice as likely to report that they know what content the sales team would like them to create.



*Salespeople, do you know which marketing assets are used most by fellow salespeople?*



With sales and marketing teams often planning separately, it's hard to tell what's working and what isn't. Without insight into how content is used lower in the funnel, sales enablement becomes a guessing game, not a strategic effort.





*“By paying attention to what content is being used the most, we can figure out whether the assets we’re developing are doing what we need them to do. Ultimately, this insight enables us to create less content yet see better results.”*

*– Jim MacLeod*

*Director, Creative and Digital Marketing, Extreme Networks*

### ***Building Modern Alignment: Designate a Single Source of Truth***



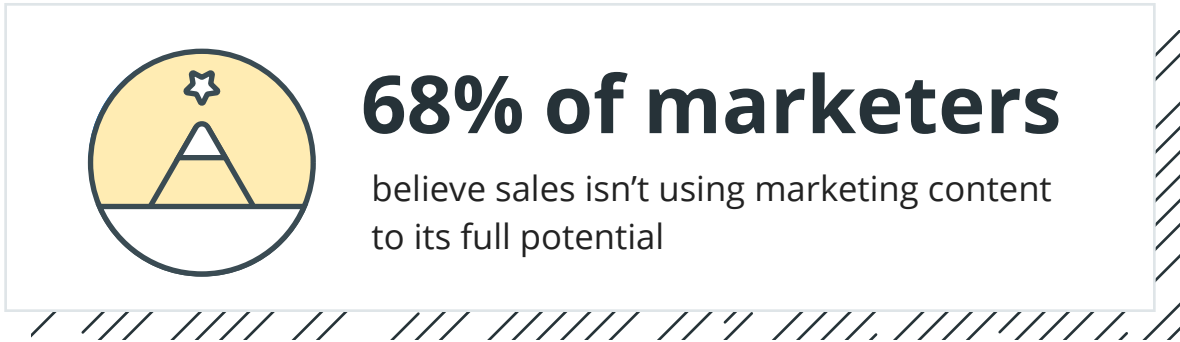
A [2017 Kapost study](#) found that nearly half of all companies store their content in six separate places, meaning it’s nearly impossible for marketers to have control over (let alone see!) what content is being used. Establishing a single, marketing-controlled place for content affords your team version control, (no more sales decks with three-year-old graphics) while tools like Kapost give visibility into what content is being shared.



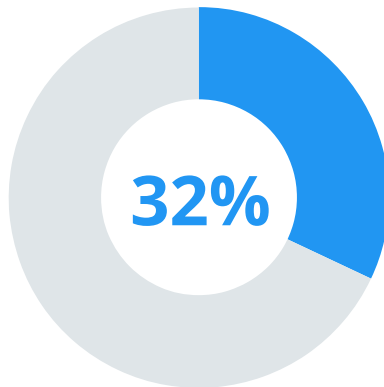


# Get the Most from Your Content

Both sides agree: marketing content has massive, untapped potential.

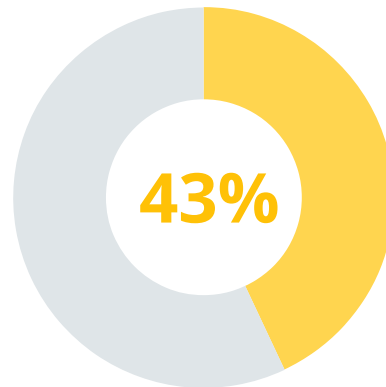


*Does sales use marketing's content to its full potential?*



**Marketing**

● No ● Yes



**Sales**

● No ● Yes



## ***Building Modern Alignment: Account-Based-Marketing (ABM)***

**Alignment is a prerequisite for ABM.** As well as agreeing on goals, target accounts, personas, and more, marketing and sales must communicate clearly about the distinct contributions and timelines associated with each team.





*“Before improving our alignment, our biggest pain point was getting content to the sales team. It became clear that the amount of time salespeople wasted looking for content amounted to lost productivity.”*

— Kristin Fallon

*Marketing Communications Director, GE Power*

### ***Building Modern Alignment: Curate Content Collections***



Every salesperson has go-to assets they return to time and time again, but chances are, marketers have created tons of content that would be better-suited for the variety of prospects sales speaks to each day. In addition to storing assets in a single place, marketers should **consider creating collections of content purpose-built for specific personas, buying stages, or accounts**. Sales won't have to waste time digging, and marketers can rest easy knowing pieces they worked hard to create are being used for their intended purpose. [Find out how Kapost gets this done with our Gallery app.](#)



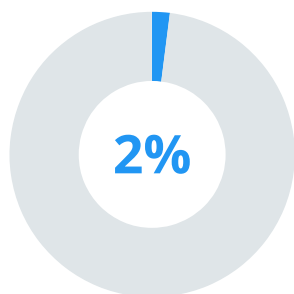
# No (Wo)man Is an Island

One of the simplest ways to build alignment is to sit down face to face. While this may seem obvious, many marketing and sales teams don't put aside time to meet regularly.

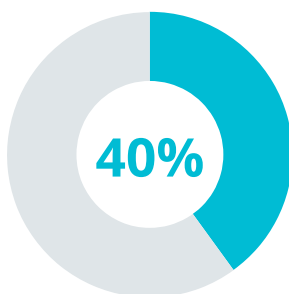


**33% of marketing**  
and sales teams don't have a standing meeting.

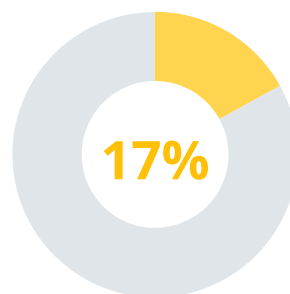
*How often do members of marketing and sales meet?*



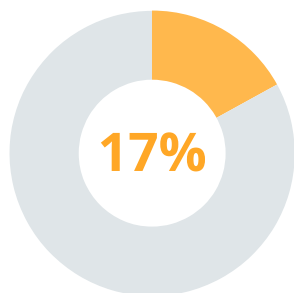
Daily



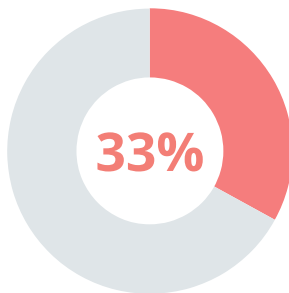
Weekly



Monthly



Quarterly



We don't have a standing meeting

*“Ad hoc, when sales wants a ‘thing.’”*  
-Survey Respondent

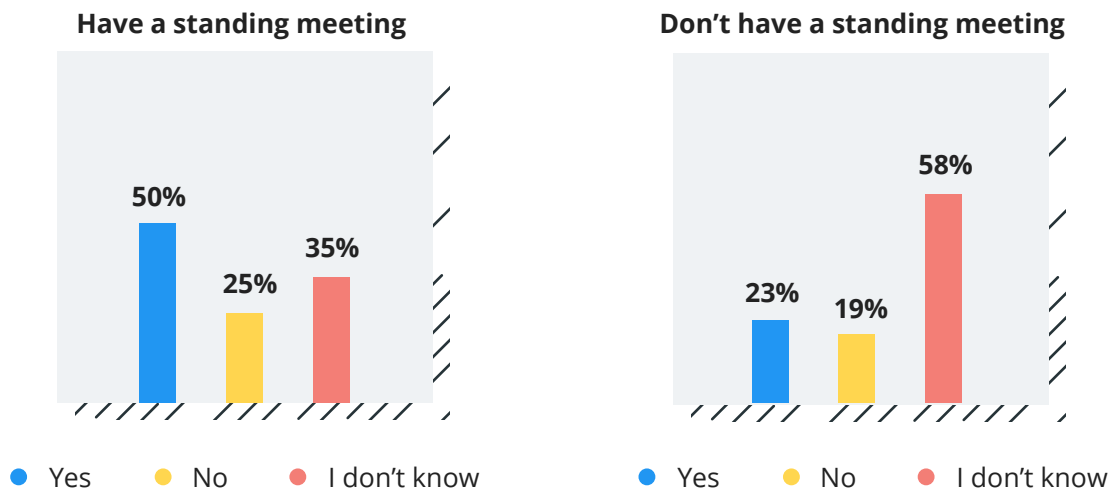


### Diving In: The Downside of Saving an Hour

The good news: the majority of marketing and sales teams meet regularly. The bad news: not having a standing meeting was the second-most popular response.

In organizations where marketing and sales don't have a standing meeting, only 23% of salespeople say their marketing teams knows which assets sales wants them to create, compared with nearly 50% of those who meet on a regular basis.

*The world according to sales: does marketing know what sales wants?*



### *Building Modern Alignment: Establish a Content Governance Board*



One of the best things you can do to increase the impact of your content is to **get buy-in from the beginning**. Create a content governance board in your organization to bring together representatives from sales, customer success, marketing, and even the leadership team. Get everyone in the same room on a regular basis, using the time to **agree on priorities and content road maps** so everyone who uses content feels that they have a seat (literally) at the table.



*“Before creating a single center where sales could find up-to-date marketing content, I felt like a glorified librarian. Sales reps would often come up to me with ideas for assets we’d created months ago! Now, salespeople find what they need and marketers know our content is reaching prospects further down the funnel.”*

— Cameron Caswell

Brand and Content Sr. Manager, Synopsys



***Is Your Team Aligned? Even More Important, Do You Agree on Being Aligned?***

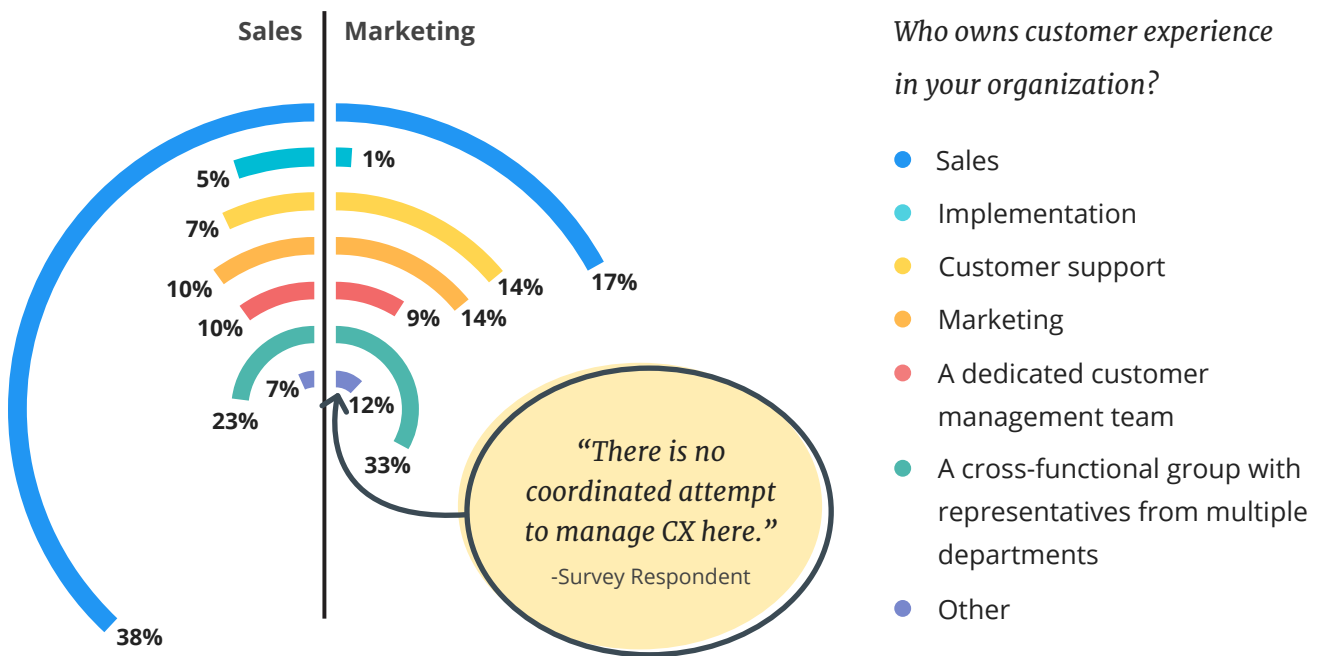
Marketing-sales alignment is impossible unless the marketing team is aligned internally. Every piece of content marketing creates should be in line with strategic priorities. [See how Kapost does this with our Canvas app.](#)



# Wasn't That *Your* Job?

One of the biggest benefits of marketing-sales alignment is a smooth and enjoyable customer journey for anyone in contact with you, whether they are an early-stage prospect or a candidate for renewal.

But who is ultimately responsible for managing the customer experience? No one seems to agree. While sales tends to self-identify as leading the customer-experience charge, marketing doesn't do the same. Instead, nearly a third of marketers are looking to the future, concluding that customer experience is the responsibility of more than one department.



## Building Modern Alignment: Everyone Owns Customer Experience



No one gets a pass on this one! And it shouldn't just be a priority for sales and marketing—**customer experience should be top-of-mind for every member of your organization.** From product to implementation, each team has an impact on customers in one way or another, and each interaction needs to be part of the same story.





CHAPTER 4

# Alignment According to Leaders & Doers

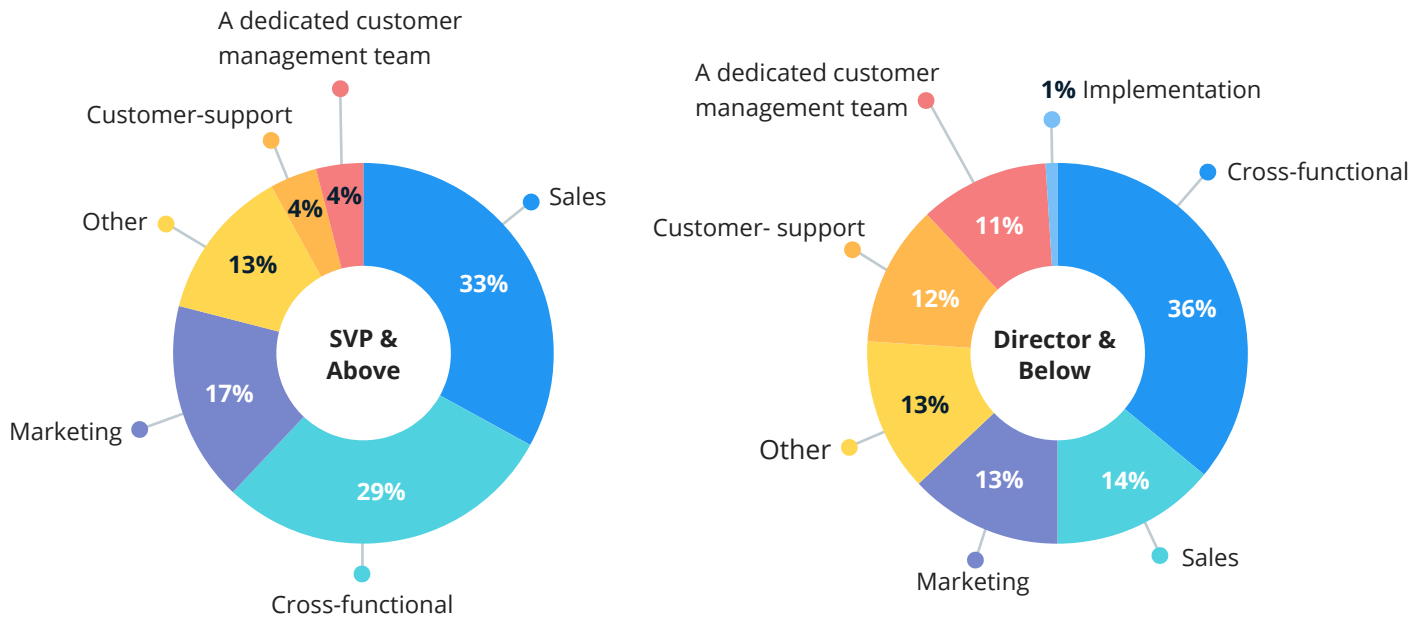
*How opinions differ from top to bottom*



# Alignment According to Leaders & Doers

The future of great customer experience depends on the contributions of every member within the organization, regardless of department or status. That’s why it’s good news that leaders and doers agree on nearly everything. Here are a few key areas where they differ.

*Who owns customer experience? Top responses from marketing leaders and doers.*

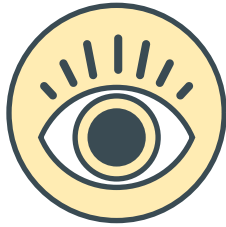


## Are industry veterans slower to adapt to the changing customer experience landscape?

Marketing leaders, like other respondents, were divided on the question of customer experience but were more likely to agree that sales was ultimately in charge. Directors and below, however, chose a cross-functional group.



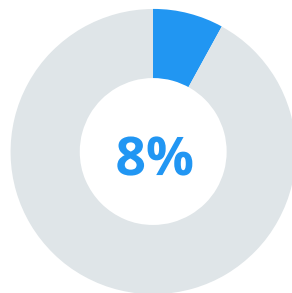




## 3x Less Likely

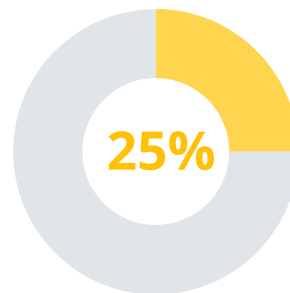
Marketing leaders are 3x less likely to identify visibility as a barrier to success.

*Marketers who identify “lack of visibility into priorities outside of my team” as a top barrier to success.*



**SVP and above**

● No ● Yes



**Director and below**

● No ● Yes

While leaders are more likely to understand how their efforts work alongside the priorities of other departments, their teams may be in the dark. Without visibility for creators and those who manage them, marketing teams will have trouble understanding—and reacting strategically to—these valuable insights.

### ***Building Modern Alignment: Change Can Start Anywhere***



In a landscape of rapid evolution, marketers on the ground floor often have better insights into market needs. Changemakers increasingly come from **outside the C-suite**, helping to challenge long-held beliefs for the benefit of the company at large. Need help starting productive conversations with your superiors? Check out [Building a Business Case for a Content Operation](#).





CHAPTER 5

# Alignment at Scale

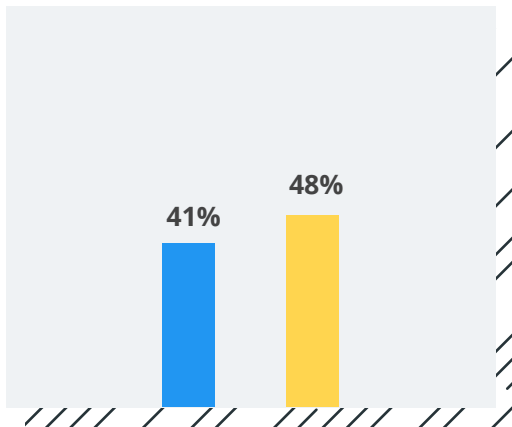
*How problems grow as companies do*



# Alignment at Scale

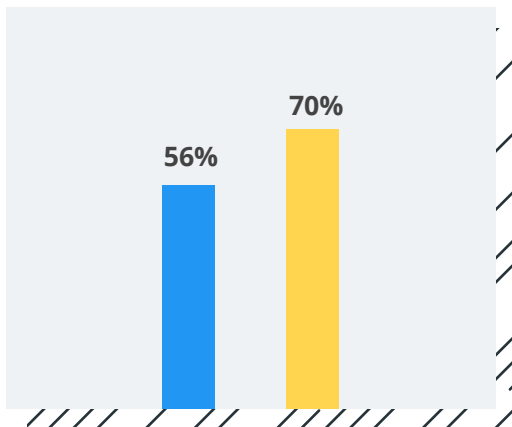
As organizations get bigger, problems do too.

*46% of marketing departments in companies of 5,000+ employees do not have a standing meeting with members of the sales team.*



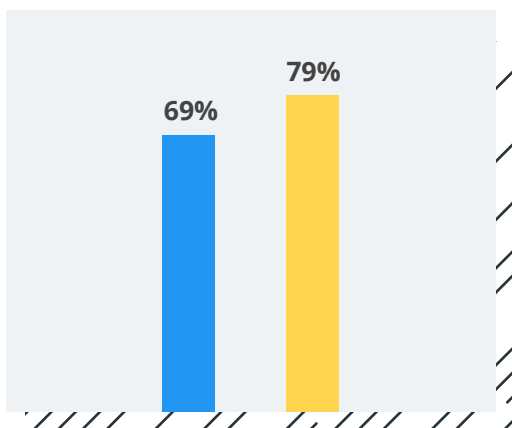
### Have visibility into how sales uses content

- Large companies (>5k employees)
- Small companies (<5k employees)



### Have standing meeting between marketing and sales

- Large companies (>5k employees)
- Small companies (<5k employees)



### Know whether internal stakeholders agree that inconsistent messages have negative effect on CX

- Large companies (>5k employees)
- Small companies (<5k employees)



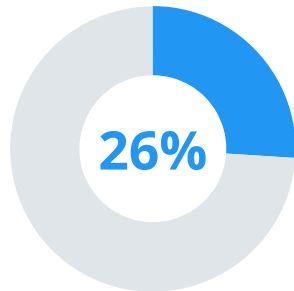
With thousands of employees spread across multiple offices, connecting with the sales team can feel cumbersome. But the need for conversation only grows as companies do. There comes a point at which strolling down the hall just won't cut it anymore and it's time to set aside time for an official, recurring meeting committed to getting everyone on the same page.



# Only 26%

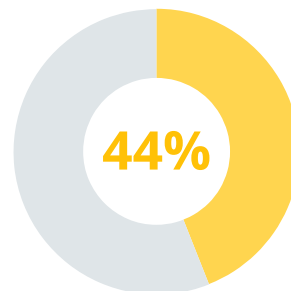
of sales reps at large companies believe marketing knows what content the sales team needs.

*Does the marketing team know what content sales would like them to create?*



Large Companies (>5k Employees)

● No ● Yes



Small Companies (<5k Employees)

● No ● Yes



### ***Building Modern Alignment: Secure Buy-In from the Top***

Even though the catalyst for change can come from lower down the totem pole, **it's imperative that new practices are endorsed by leadership** from marketing and sales alike. Particularly in larger organizations where teams are more likely to be siloed, salespeople are quicker to accept changes like the adoption of centralized content repositories if benefits are communicated from the sales perspective by a trusted source.



CHAPTER 6

# How Far We've Come

*Comparing today's findings with those of 2016*

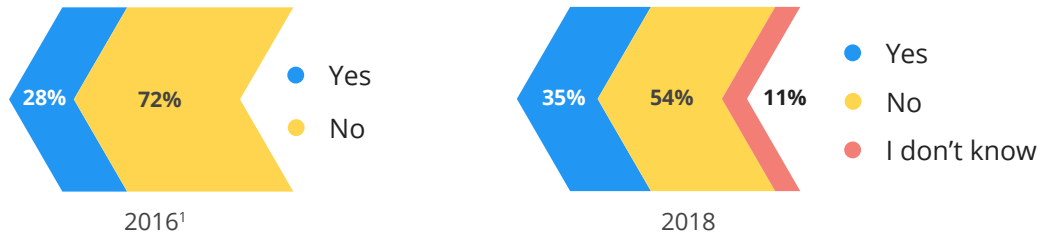


# How Far We've Come

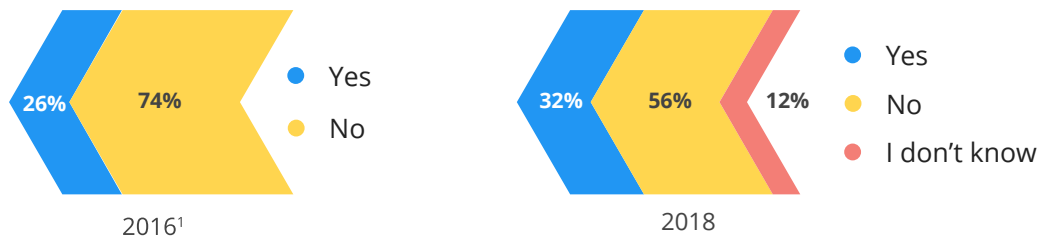
Alignment isn't just creating and sharing content internally—it's fundamentally rooted in the processes that govern the planning, creation, and distribution of the content at large to ensure it makes the greatest impact.

Data suggest we're moving in the right direction—but not at the pace necessary to create the content a modern organization needs.

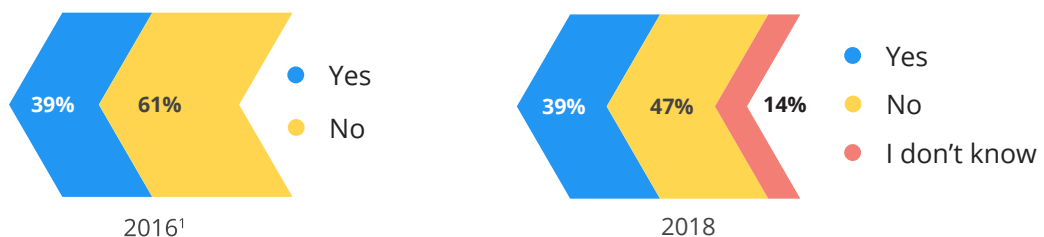
*Do you use internal crowdsourcing for content ideation?*



*Do you identify content gaps by persona?*



*Do you have documented buyer's journeys?*



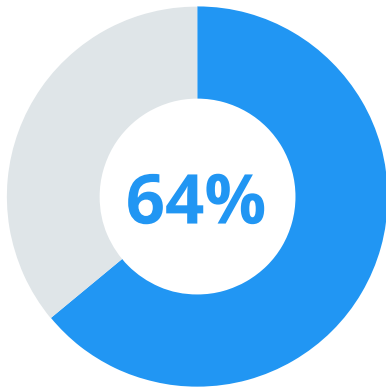
1. Kapost. [Customer Experience Benchmark Report](#) (May 2016)



### Diving In: The Value of Personas

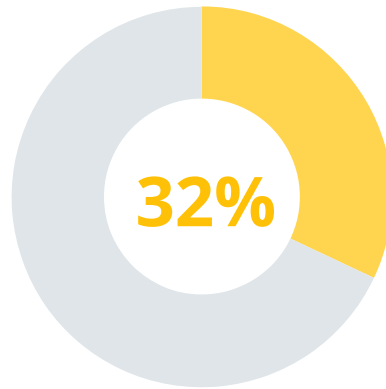
Marketers with a process to identify content gaps by persona are twice as likely to have the ability to assess the performance of their content.

*Do you have the ability to accurately assess your content's performance?*



**Teams that Identify Gaps by Persona**

● No ● Yes



**Teams that Do Not Identify Gaps by Persona**

● No ● Yes

#### ***Building Modern Alignment: Create Company-Wide Personas***



Want to ensure your content is usable? Get stakeholders from product, sales, customer success, and marketing in a room to hammer out **universal personas**. Chances are, even if your marketing team uses personas to map content gaps, they're different from those used by other departments. **Agree on who your target personas are**, how they behave, their biggest pain points, etc. That way, content developed for specific personas will be consistent across teams.



CHAPTER 7

# The Future of Alignment

*Habits of top performers and the impact of technology*



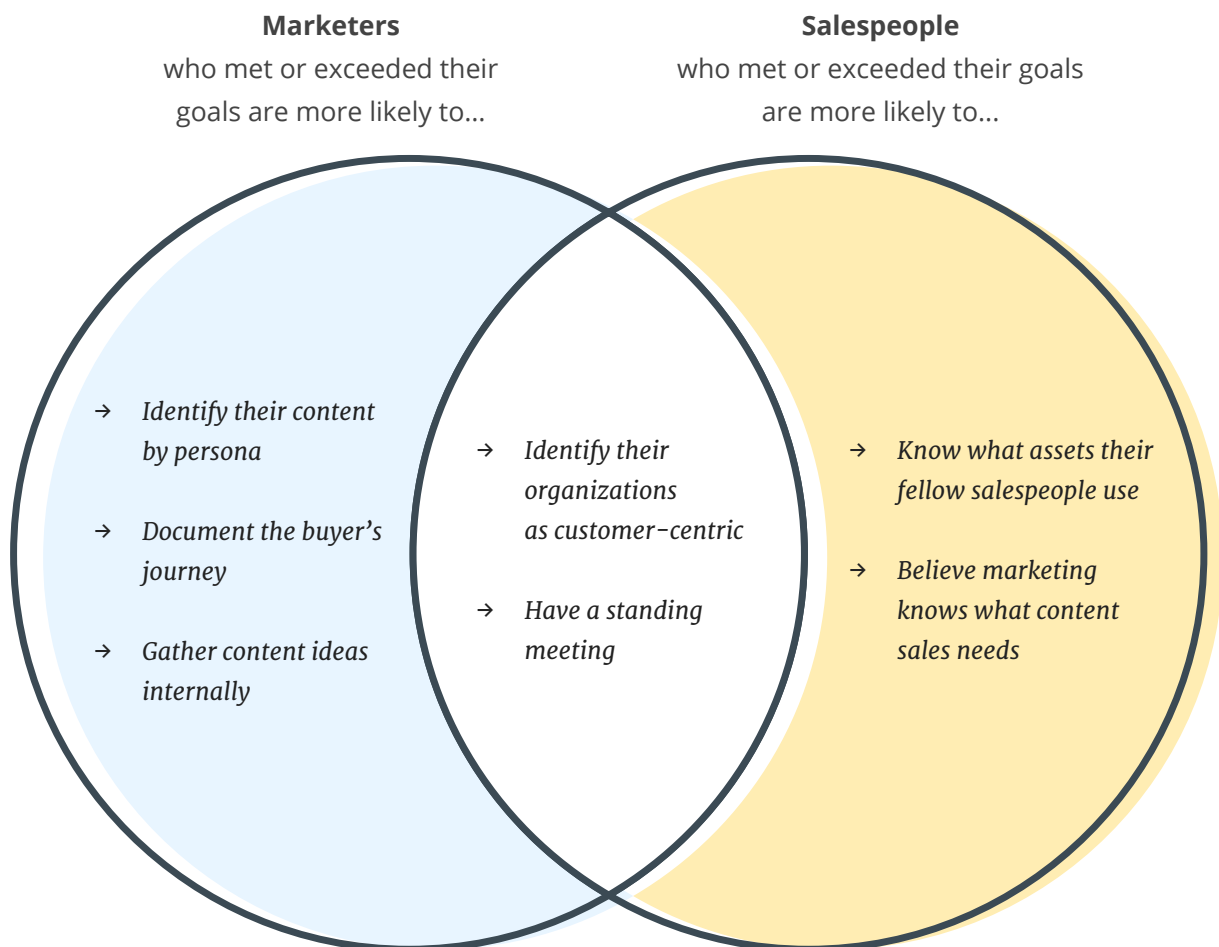


# The Future of Alignment: Habits of Top Performers

When writing a benchmark, it's easy to make overblown claims about the differences between high and low achievers, inevitably concluding that the topic is the be-all-end-all indicator of marketing success. While it's imperative to avoid this sort of unscientific pitfall, it's also important to highlight the trends associated with top performers.

While those who met or exceeded their goals last year still have work to do, the data are clear: industry leaders are working actively towards better alignment.

Top performing marketing and sales teams are more likely to be aligned.



# Tools Won't Save Us

---

As easy as it would be for us, a software company, to conclude that the solution to your alignment woes is attainable through tools alone, we know this isn't the case. Tools are crucial in enabling marketers to execute on their good intentions, but are only as strategic as the people who use them.

Marketers in organizations that invested in a comprehensive content marketing platform like Kapost were more likely to have a documented buyer's journey, identify gaps by persona, and have visibility into asset usage by the sales team—all crucial steps to marketing success.

**However, CMP users are just as likely as non-CMP users to suspect their content isn't being used to its full potential by sales.**

Reaching alignment—and the benefits that come with it—is only possible if stakeholders from sales and marketing fundamentally shift the way they approach the problem. Like an elliptical gathering dust in the basement, a tool's success hinges on a commitment to change.

That's why true alignment starts with a [content operation](#)—the collection of people, processes, and technology that allows us to strategically plan, produce, distribute, and analyze our content.

**A content operation is [more than just content marketing](#): it prioritizes strategy, collaboration, accessibility, and insight in order to make less matter more.**





CHAPTER 8

# Your Next Steps

*Tactical resources to build alignment at your organization*



# Surveying the Horizon: Your Next Steps

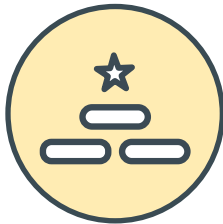
Because we know that you, the customer, are in control, we're leaving it to you to choose the next stop on your alignment adventure.



## I probably need to start from scratch.

Need to get key stakeholders bought in on the benefits of a strategic content operation before you can work towards alignment? Not to worry. We've put together personalized scripts and talking points to empower you to be the changemaker you always knew you could be.

[Download the guide.](#)



## I'm ready to build better sales-marketing alignment!

Great! Here's a facilitation worksheet to help you start the conversation with your sales team.

[Get the printable guide.](#)



## I've tried everything. Help!

It may be time to call in the experts. Kapost has worked with hundreds of the world's top-performing marketing organizations and has all the resources you need, deliverable right to your door. Our professional services team will help your team create lasting change—no software required.

[Learn more.](#)



**BONUS!**

# **Insights from Experts**



# Insights from Experts

We asked some of marketing’s most illuminating thought leaders to weigh in on why the need for alignment is so urgent today, how marketers can enable sales with great content, and what we can expect in the future. While their takes varied, everyone agreed that alignment is central to building trust with customers and prospects—and that losing said trust can spell disaster.

*The traditional illustration of the sales process is a funnel, which suggests that people simply fall into the top and flow effortlessly through the phases to the bottom. In reality, the sales process rarely happens that smoothly—or that fast!*

**—Jim Edwards**  
Chief Visionary, SpryIdeas

*“The lines between sales and marketing are fading. The modern sales professional is an information concierge and a content connoisseur. She educates and engages her buyers (with content) where her buyers are learning.”*

**—Jill Rowley**  
Chief Growth Advisor, Marketo

*“Marketing and sales must be aligned for successful companies today. In this “Age of the Customer,” customers expect and demand epic experiences on a consistent basis.”*

**—Cathy McPhillips**  
VP of Marketing, Content Marketing Institute

*“As privacy concerns escalate, brands have to be on point throughout the customer journey. That means sales, marketing, customer service—everybody performing in unison. It only takes one off-putting interaction to lose a prospect or customer forever.”*


**—Andrea Fryrear**  
President and Lead Trainer, AgileSherpas



# Insights from Experts

*“Lose trust and you lose customers. Marketing and sales must be aligned on promises made during the sales process to set up maximum post-sale customer satisfaction and loyalty.”*

**—Drew Neisser**  
Founder & CEO, Renegade




*“If your marketing and sales teams aren’t aligned on the story they’re sharing, it’s more than likely there will be a misstep that will cost you in customer trust and business.”*

**—Ardath Albee**  
B2B Marketing Strategist & CEO of Marketing Interactions, Inc.

*“By connecting content to sales, we increase our value and cement our positions as critical to business success. Few people have been fired or laid off for increasing sales.”*

**—Scott Abel**  
Content Wrangler



*“Many companies have strategic alignment, but few get to operational alignment on a daily basis. Don’t underestimate the importance of culture change to drive that alignment in a meaningful, sustainable way.*

**—Matt Heinz**  
President, Heinz Marketing Inc

*Marketing has to earn the right for sales to have a conversation and they do that by more personalized and relevant marketing experiences.*

**—Seth Lieberman,**  
CEO and Founder of SnapApp





## About Kapost

*Kapost partners with B2B marketers as they build and manage a content operation that produces and delivers the right content to the right customer at the right time at scale. Kapost offers benchmarked, expert consulting services and a comprehensive software platform to support B2B marketers as they apply a new operating model to the processes and software with which they plan, produce, distribute, and analyze marketing content. Marketing teams at IBM, GE, FedEx, Ciena, Salesforce, AT&T, Extreme Networks, DatAvail, and more are investing in a content operation with Kapost.*