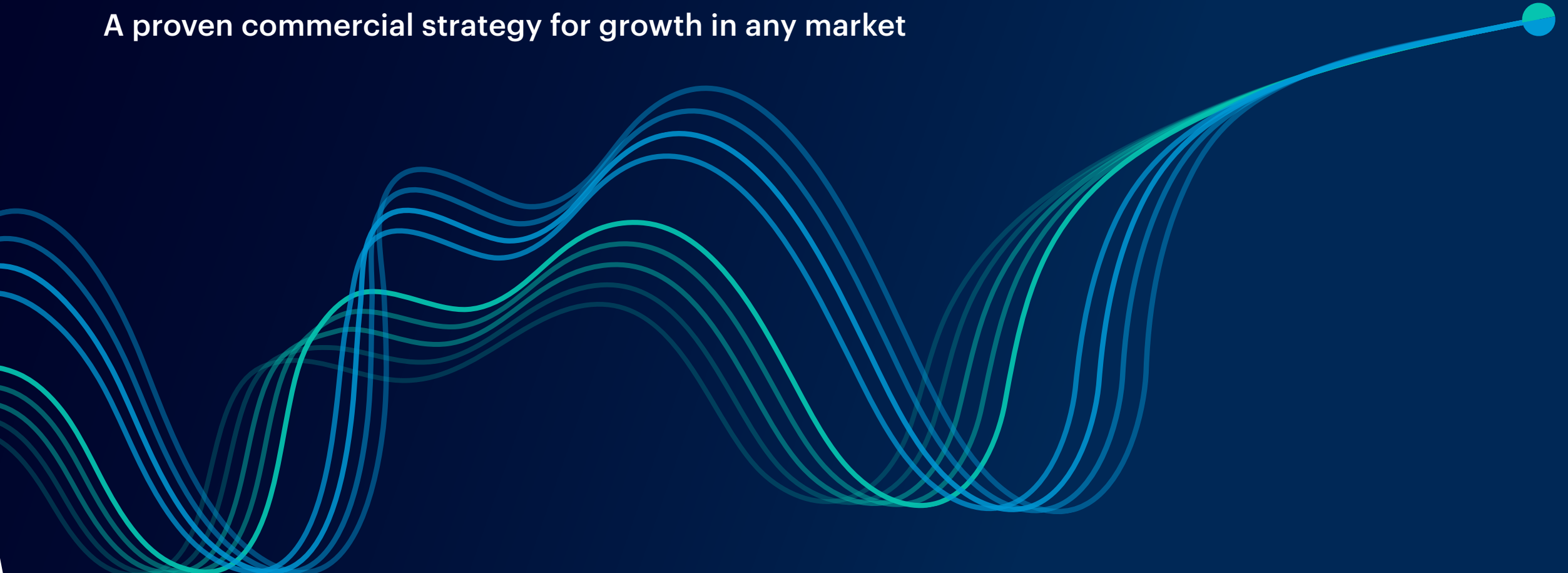


Gartner for Sales Leaders

Gartner®

# Integrating Sales and Marketing to Drive Demand

A proven commercial strategy for growth in any market



## Orchestrated digital and sales rep interactions deepen customer learning and lead to higher-quality deals

A seamless omnichannel customer experience and guidance from reps are important — but only when they work together to foster deep buyer learning and self-reflection necessary for productive B2B buying. As buyer journeys become more complex, commercial organizations must deliver a more integrated human and digital customer learning experience.

Breaking down silos between sales and marketing to help customers learn and buy more is an incremental process. Wherever your organization is on the journey, you can take steps to build a streamlined commercial engine.

### How do you get started? In this eBook we provide:

- An outline of the desired B2B buyer experience and where sellers fit in
- The four phases of sales and marketing alignment
- The six main areas to assess for maturity
- Two real-life examples of companies that have gotten results with a unified commercial strategy



A bar chart with a teal bar representing a 2.96x increase. The bar is positioned on a horizontal axis. The value '2.96x' is written in white text inside the bar.

Sales organizations that prioritize alignment with marketing are nearly **three times more likely** to exceed new customer acquisition targets.

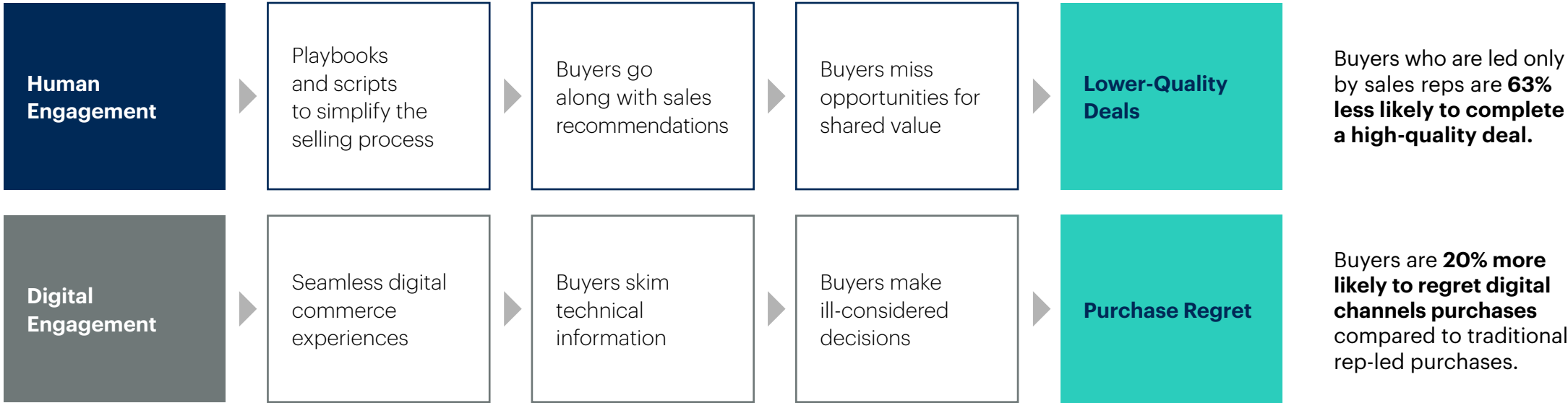
Source: Gartner

# Separate sales rep and digital engagement stifles customer learning

To meet customers' needs across channels, chief sales officers (CSOs) take two approaches:

- Focus on talent acquisition, development and strategy by way of human-led channels.
- Increase investment on digital channels, relying on marketing to drive commercial results.

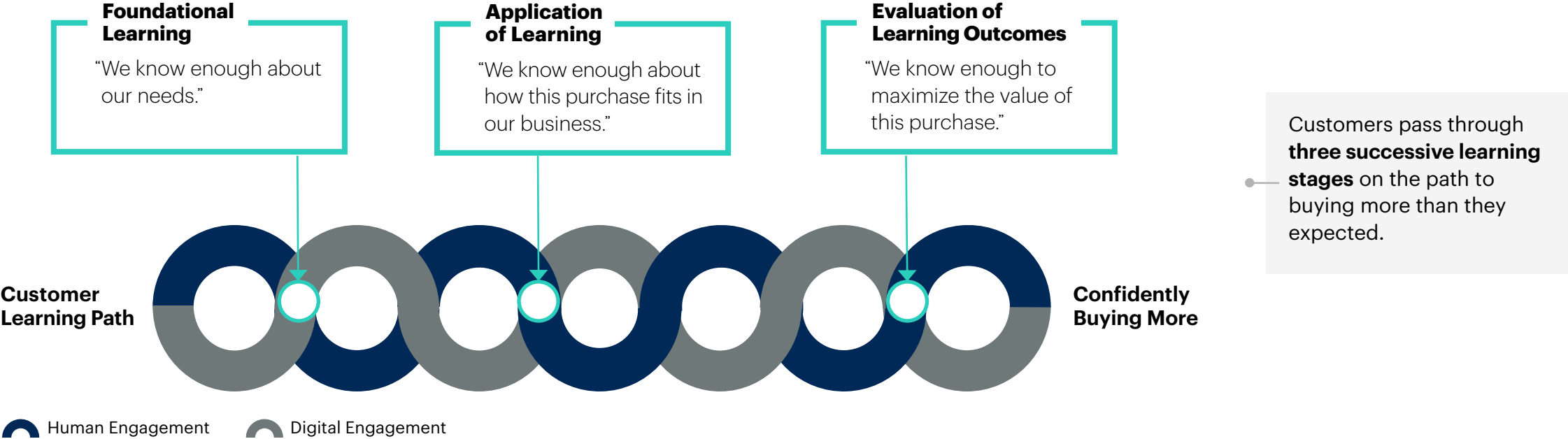
Neither approach is likely to solve the underlying problem: ineffective customer learning.



Source: Gartner

# Unified sales rep and digital engagement deepens 3 stages of learning

Sales and marketing can work together to create an integrated, customer-centric commercial strategy that choreographs customer learning moments across channels.



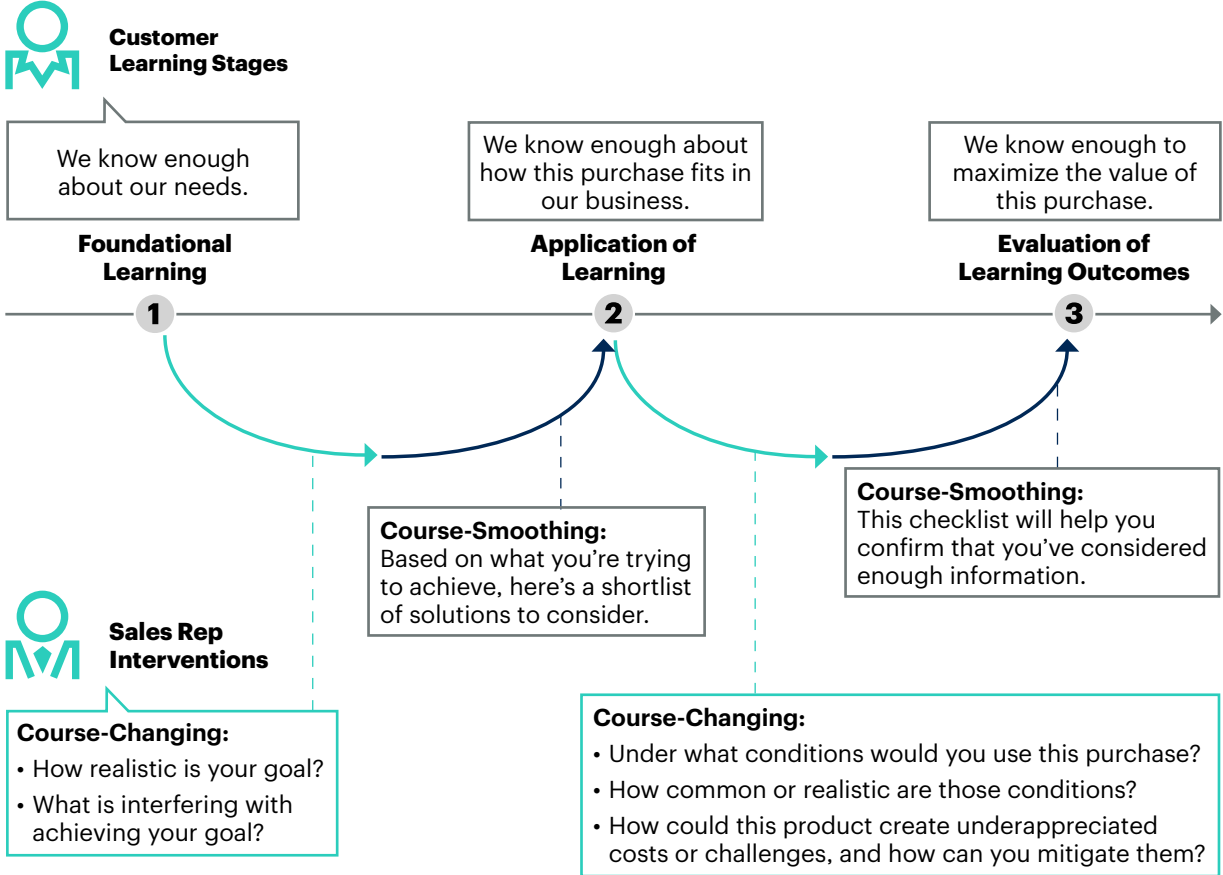
Source: Gartner analysis of in-depth customer interviews, Gartner Consumer Community panels and academic literature. See for example: Bloom, Benjamin S. Taxonomy of Educational Objectives: The Classification of Educational Goals. New York: Longmans, Green, 1956.

# How and when sellers intervene is key to deep learning

Sales reps can coordinate with marketing to deliver course-smoothing and course-changing interventions at key moments across the purchase journey. Choreographing these interventions ensures that customers progress smoothly through three stages of learning, ultimately culminating in a high-quality deal.

Customers that take the time to reflect on their purchase decision and realize something new about their own needs and goals are **16% more likely to have high confidence**. Decision confidence results in a higher likelihood of completing a high-quality deal.

[Learn more about creating customer learning paths](#)



Source: Gartner

# Where does your organization stand? 4 levels of sales and marketing alignment

Chart your path to a unified commercial strategy across four levels:

**How Marketing and Sales Leaders Can Progressively Advance in Maturity**  
Illustrative



Source: Gartner

# Where does your organization stand?

## 6 main areas of maturity

To achieve the desired buyer journey, sales and marketing leaders should assess six main areas that are essential to customer-centric, go-to-market strategy:



## Case study

# SMART Technologies: A new way to organize



**Summary:** Siloed commercial operations posed a hidden yet significant threat to growth. SMART Technologies integrated sales, marketing and service silos into a single commercial engine to develop a unified go-to-market strategy with teams whose responsibilities are tied to buying jobs.

### Problem

As B2B buyers increase digital and multichannel buying, siloed commercial operations led to a discontinuous purchase experience, resulting in operational redundancies, excess spend and loss of business.

### Action

- Created a compelling, customer-centric change narrative to get C-suite buy-in
- Redesigned customer-facing commercial roles to align to customer buying jobs
- Combined newly defined roles into cohesive six- to 10-person teams to enable shared visibility and accountability
- Established customer-centric business processes to jointly deliver value across the customer journey



### Results

- **Increased year over year (YoY) revenue by about 48%, lead volume by 50% and lead acceptance rate by 35%**
- Defined all customer tasks and supporting organizational activities — regardless of legacy functional responsibilities — and mapped out skills needed to execute on each to develop customer-centric commercial roles
- Combined newly defined roles into cohesive teams with shared objectives to enable visibility and team leader accountability at scale

[Read Full Story ↗](#)



## Case study

# Altium: Organizing data for more transparent buying journeys

# Altium

**Summary:** Extensive virtual collaboration among B2B buying group members adds unwanted complexity to purchase processes. Altium developed a simple external-facing tool to help marketers, sellers and buying groups track progress, build consensus and optimize interactions.

### Problem

In a complex purchase journey, members of buying groups may be unsure of their progress within the buying journey or struggle to communicate decisions or questions to other members. This makes it hard for commercial teams to intervene and assist buyers.

### Action

- Created a simple tracking tool editable by buyers, sellers and marketers to enable shared understanding of a purchase journey to help all parties quickly surface and resolve challenges
- Prioritized data fields to minimize the burden of data entry and increase their ease of use



### Results

- **Propelled Altium to increase its close rate to 80% from roughly 20%**
- Shortened Altium's sales cycle by enabling commercial teams to better diagnose problems in the buying process
- Improved coordination between sales and marketing, smoothed handoffs in the commercial process and allowed more effective onboarding of new sellers and marketers

[Read Full Story](#) ↗

# How Gartner guides CSOs to build and execute a unified commercial strategy

## Diagnose and Evaluate →

### Connect With Peers

#### Attend Virtual Executive Retreat — The CSO’s Role in a Unified Commercial Strategy

Join your peers to learn how progressive organizations align commercial strategy and operations to deliver high-value deals in today’s complex B2B environment.

### Benchmark & Tools

#### Assess Sales and Marketing Alignment

Use the Gartner [Marketing and Sales Maturity Model\\*](#) to benchmark your organization’s level of alignment between marketing and sales.

### Actionable Insight

#### Align the Sales Process to the B2B Customer Buying Journey

Examine your alignment with the customer buying journey using the [Ignition Guide to Aligning a Sales Process With the B2B Customer Buying Journey\\*](#).

### Expert Guidance

#### Progress Check

Engage with a Gartner expert to review commercial alignment strengths and gaps and how they could impact your sales strategy.

## Develop the Plan →

### Actionable Insight

#### Prepare to Plan

Review this research to understand challenges with strategic planning — [Strategic Planning: 3 Critical Pitfalls and How to Avoid Them\\*](#).

### Expert Guidance

#### Build the Plan

Inquiry with a Gartner expert to prioritize actions to address gaps in commercial alignment using the [Ignition Guide to Strategic Planning for Sales\\*](#) to assist in planning efforts.

### Actionable Insight

#### Explore Best Practices

Review the best practice [Case Study: Unified and Customer-Journey-Aligned Commercial Organization\\*](#) to understand how a client organization collapsed functional siloes into a single commercial engine.

### Expert Guidance

#### Design the Modern Revenue Tech Stack

Engage with a Gartner expert to explore revenue data solutions to accelerate commercial coordination.

## Execute the Strategy →

### Benchmark & Tools

#### Build the Change Story

Use the Gartner [Tool: Sales Strategy Change Story Template\\*](#) to craft a change story that builds buy-in and accelerates progress.

### Expert Guidance

#### Expert Discussion on Change Management

Speak with Gartner Sales experts to discuss change management and how to develop a framework to align with your commercial strategy.

### Actionable Insight

#### Prioritize Customer Learning Paths to Drive Digital Sales

Evolve your sales strategy with learning paths to increase the likelihood of customers buying more than expected — [Create Customer Learning Paths to Unlock Digital Sales\\*](#).

### Connect With Peers

#### Gartner Event

Attend an in-person sales executive retreat to discuss the most pressing challenges with other chief sales officers.

## Ongoing Support

### Connect With Peers

#### Gartner Event

Attend the Gartner premiere event for sales leaders, Gartner CSO and Sales Leader Conference.

### Actionable Insight

#### Drive Buying Group Collaboration

Review this [Case Study: Help B2B Buyers Transparently Track Complex Buying Journeys\\*](#) to learn how Altium shortened its sales cycle and improved close rates by launching a tool to help commercial teams and buyers collaborate virtually.

### Benchmark & Tools

#### Benchmark Against Peer Organizations

Participate in the [Sales Budget, Operations and Efficiency Benchmark\\*](#) to compare your organization’s structure, headcount, spend, budgets, functional efficiency and operations function to your peers.

\*Gartner client login required

# Connect With Us

Get actionable, objective insight to deliver on your mission-critical priorities. Our expert guidance and tools enable faster, smarter decisions and stronger performance. Contact us to become a client:

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**International:** +44 (0) 3330 607 044

[Become a Client](#)

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