

# THE POWER OF SMARKETING.

Inbound Certification Class #9



**#INBOUND**

# AGENDA

1. What is Smarketing and why it is critical
2. Smarketing = alignment
3. 5 steps to integrate Smarketing into your organization
4. Key takeaways and resources

# Inbound Methodology



by **HubSpot**

# 1 WHAT IS SMARKETING AND WHY IT IS CRITICAL?

87%

of the terms sales & marketing  
use to describe each other  
are **negative.**

# SALES

- “simple-minded”
- “incompetent”
- “lazy”



# MARKETING

- “arts and crafts”
- “academics”
- “irrelevant”



SALES + MARKETING =

**SMARKETING.**



Two halves of the same team:  
**Team Revenue**

Companies with strong  
sales & marketing  
alignment get

**20%**

annual revenue growth.

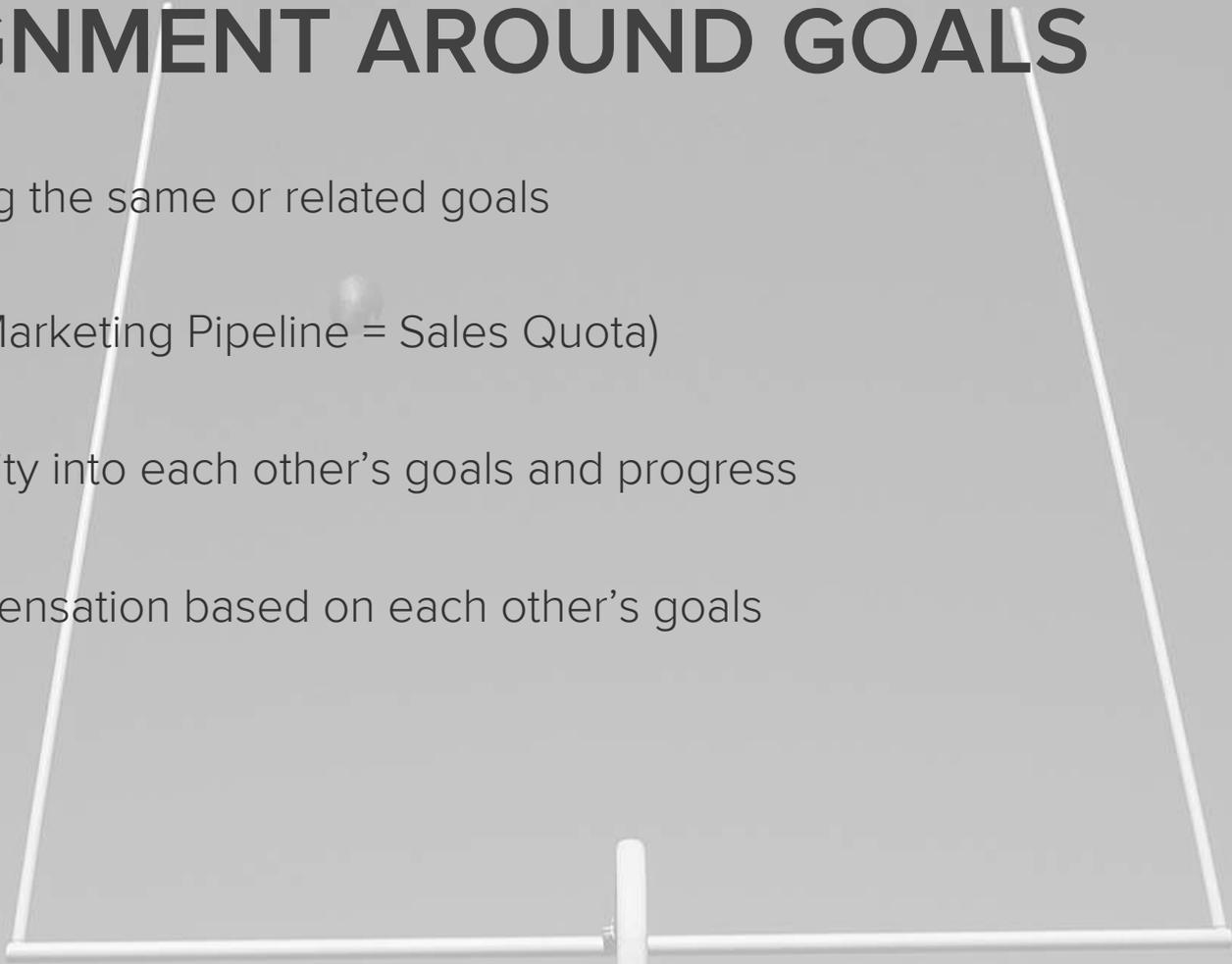
**2** **SMARKETING  
EQUALS ALIGNMENT.**



## Get on the **same team.**

Align both sales and marketing around the same goals and personas.

# ALIGNMENT AROUND GOALS



- Having the same or related goals
- (e.g. Marketing Pipeline = Sales Quota)
- Visibility into each other's goals and progress
- Compensation based on each other's goals

# ALIGNMENT AROUND GOALS

Helps you achieve those goals.



Enterprise  
Marketing



Enterprise  
Sales



# ALIGNMENT AROUND PERSONAS

- Communicate persona details across the company
- Educate each other about new persona details
- Specialize teams around particular personas



# ALIGNMENT AROUND PERSONAS

helps you solve for those personas



Non-Profit  
Marketing



Non-Profit  
Sales



3

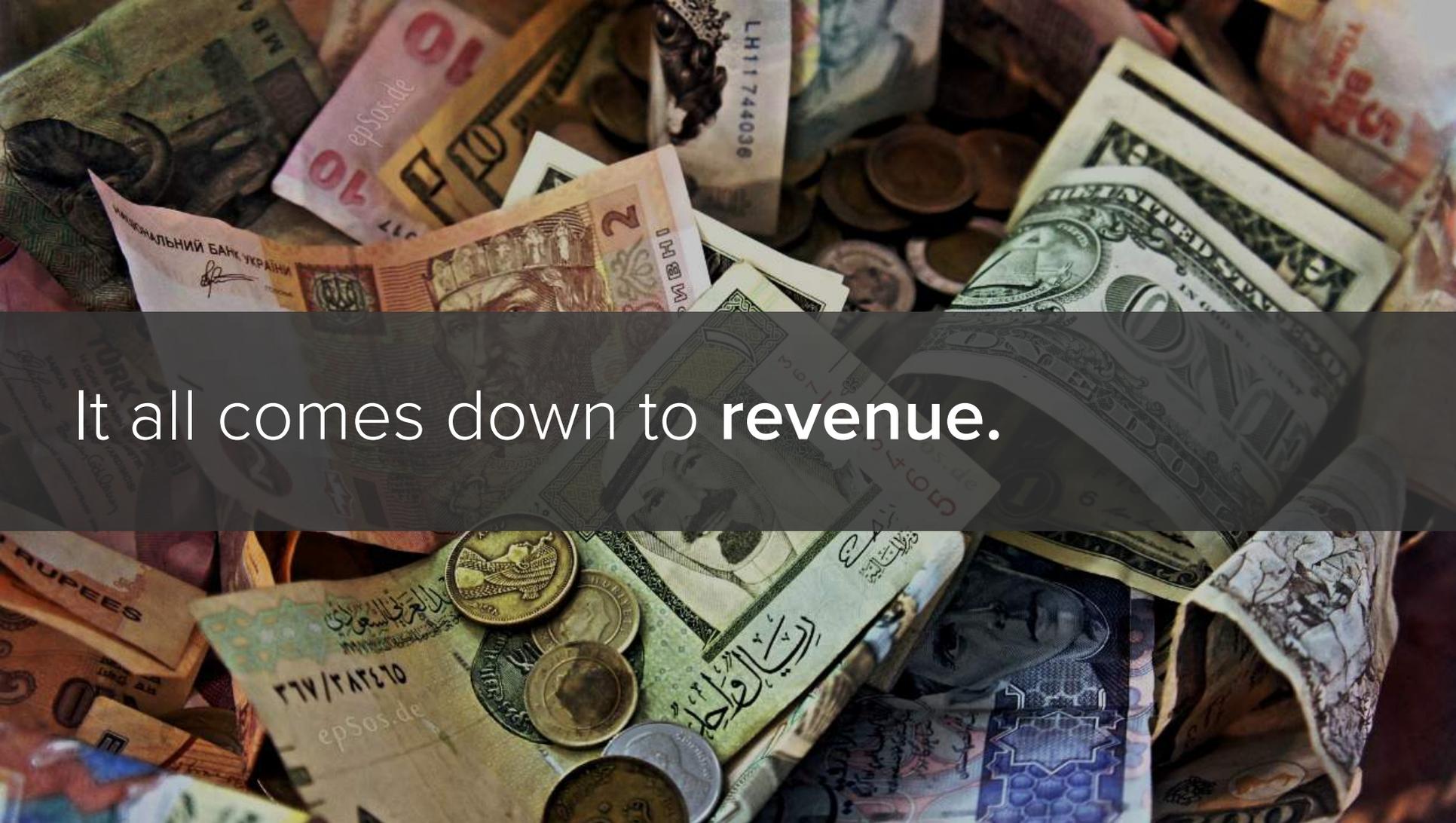
FIVE STEPS TO INTEGRATE  
SMART MARKETING INTO  
YOUR ORGANIZATION.

# 5 STEPS TO INTEGRATE SMARKETING

- 1 Speak the same language
- 2 Set up closed-loop reporting
- 3 Implement a Service Level Agreement
- 4 Maintain open communication
- 5 Rely on data

# 5 STEPS TO INTEGRATE SMARKETING

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It all comes down to **revenue.**

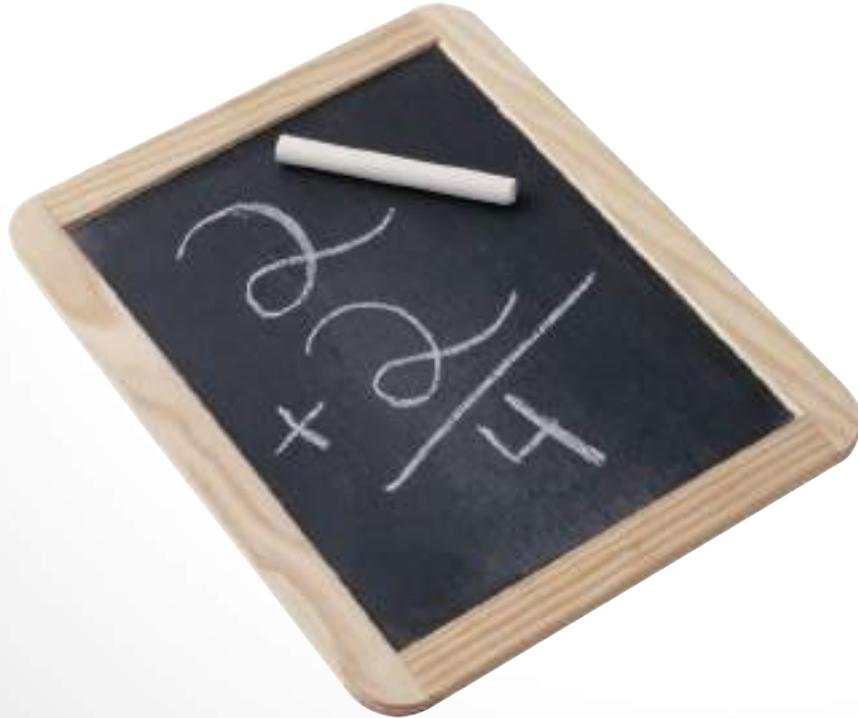
How many marketers have  
signed up for a **number**?



Sales is incredibly  
**numbers-driven.**

Part of getting on the same team is taking  
on a number with them.

# Work **backwards** from sales.



- 1 Start with your shared goal: REVENUE.
- 2 Revenue Goal: \$10,000
- 3 Avg. Deal Size: \$1,000  
- Current Revenue / Current Customers
- 4 Customers Needed: 10  
- Revenue Goal / Avg. Deal Size
- 5 Avg. Lead to Customer %: 2%  
- Current Customers / Current Leads
- 6 Leads Needed: 500  
- Customers Needed / Avg. Lead to Customer

Map the **buyer's journey** to the **lifecycle stages** in the funnel.



Only  
**45%**  
of businesses  
have established a  
company-wide definition  
of a sales-ready lead.

# SALES

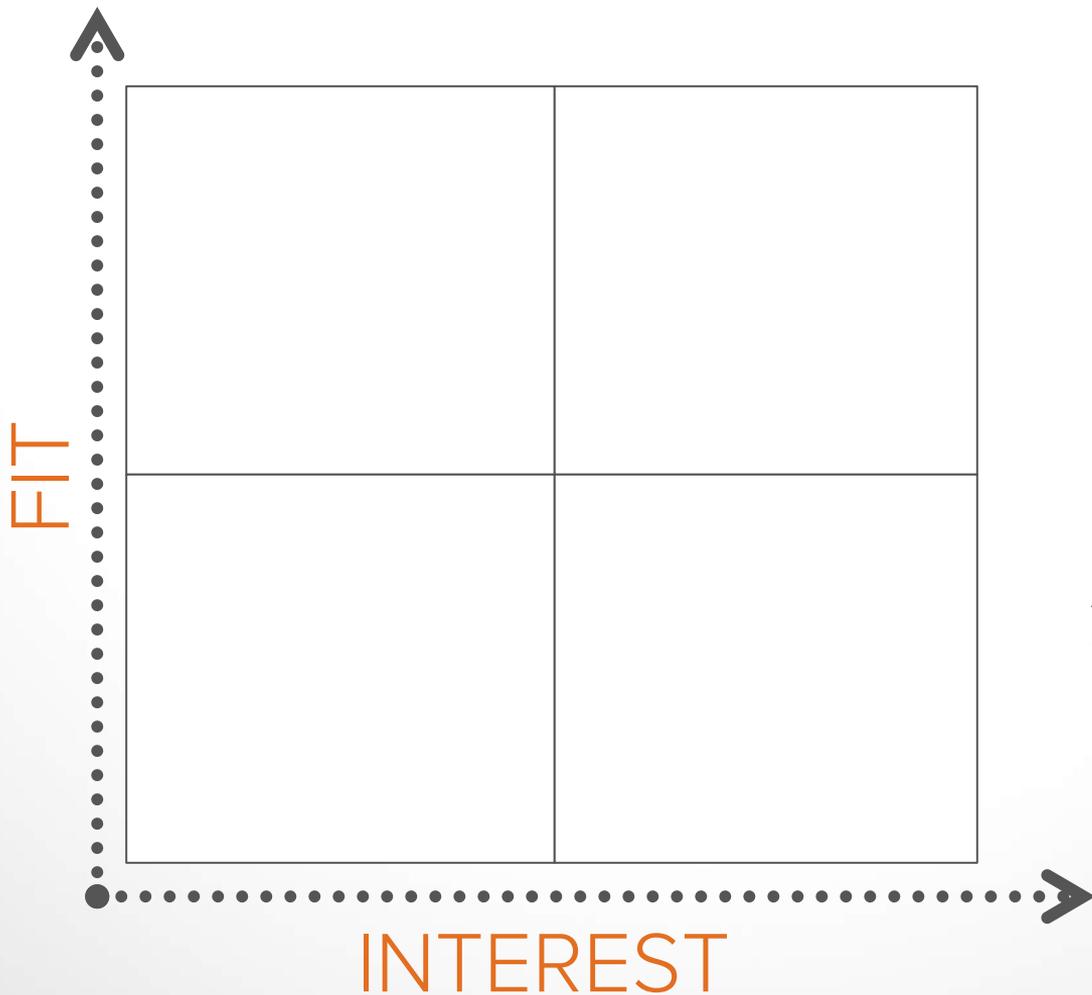
“Marketing leads are terrible quality.”



# MARKETING

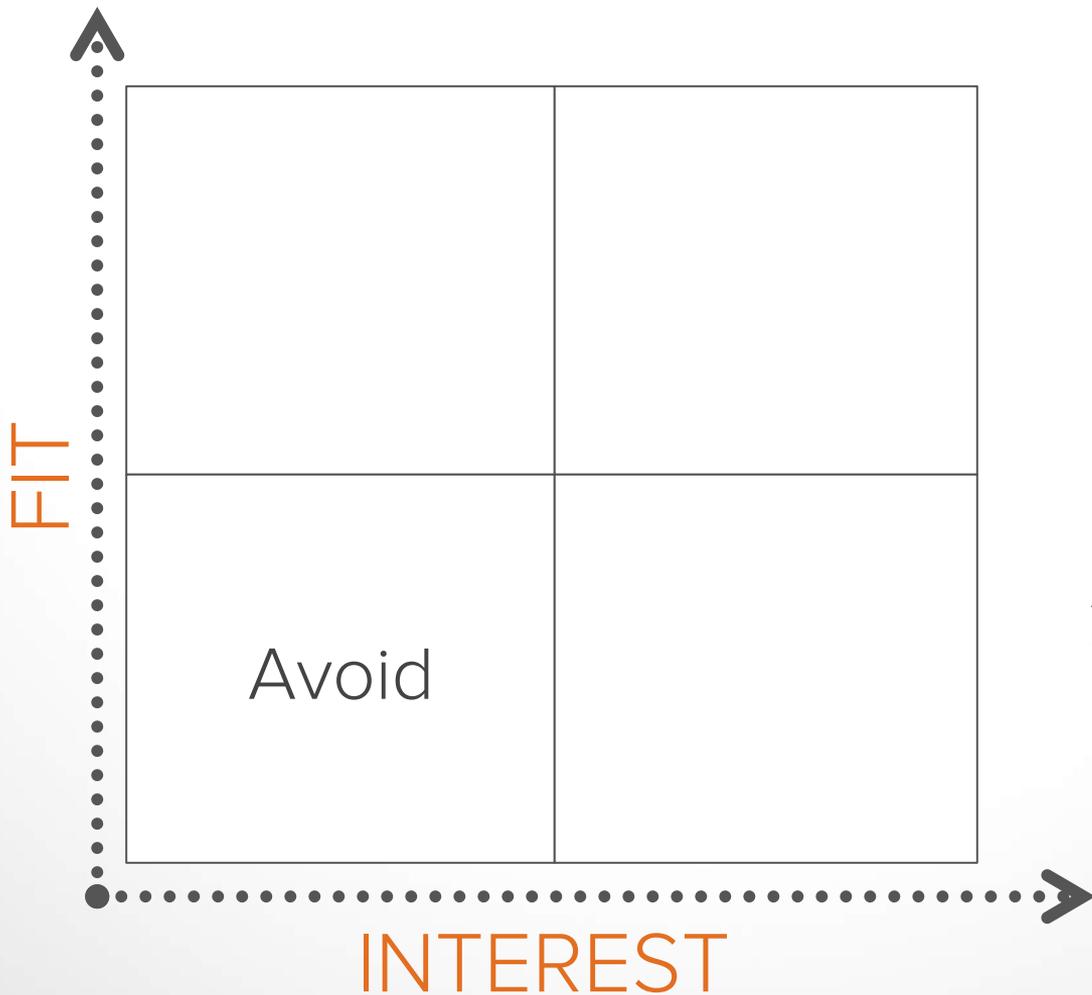
“Sales doesn't work our leads.”





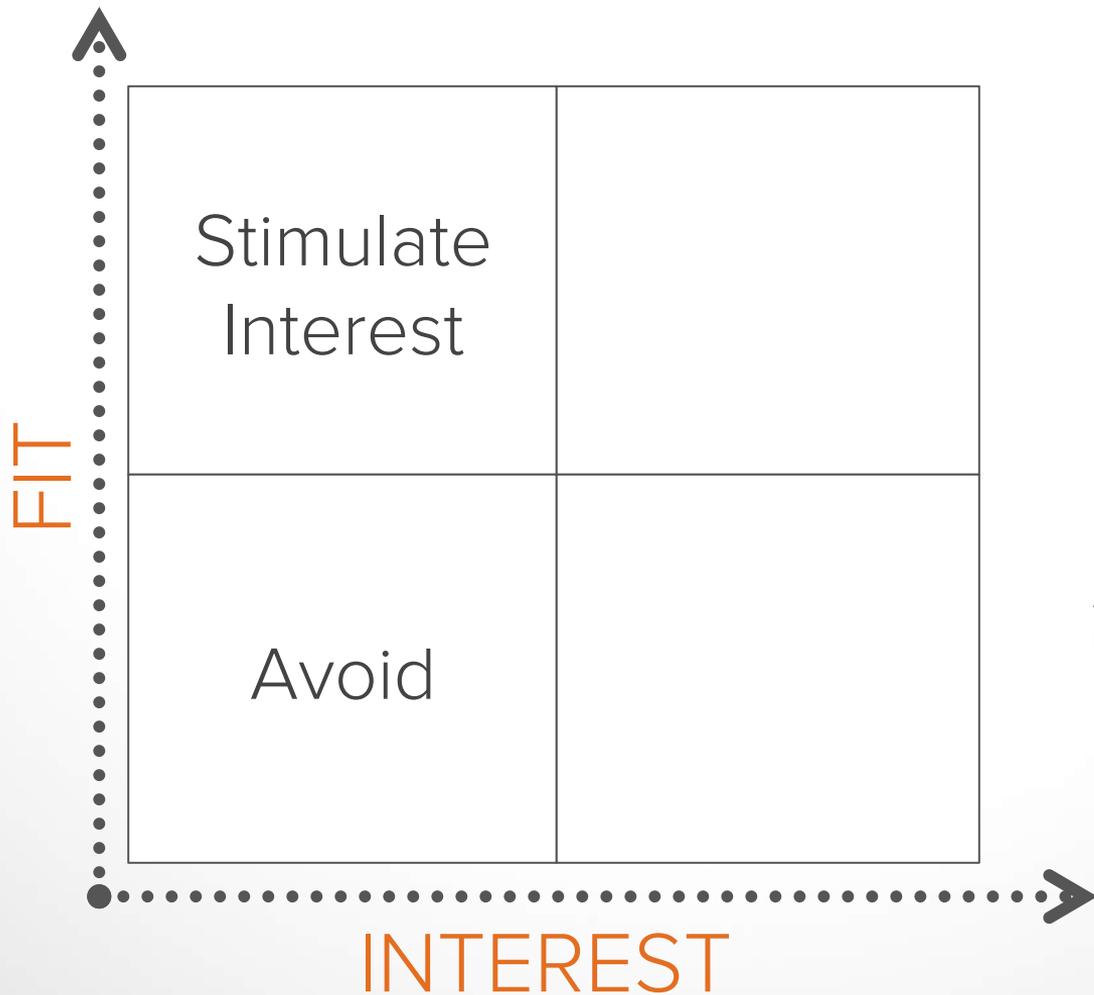
What is a **sales-ready** lead?

A great fit lead with high level of interest.



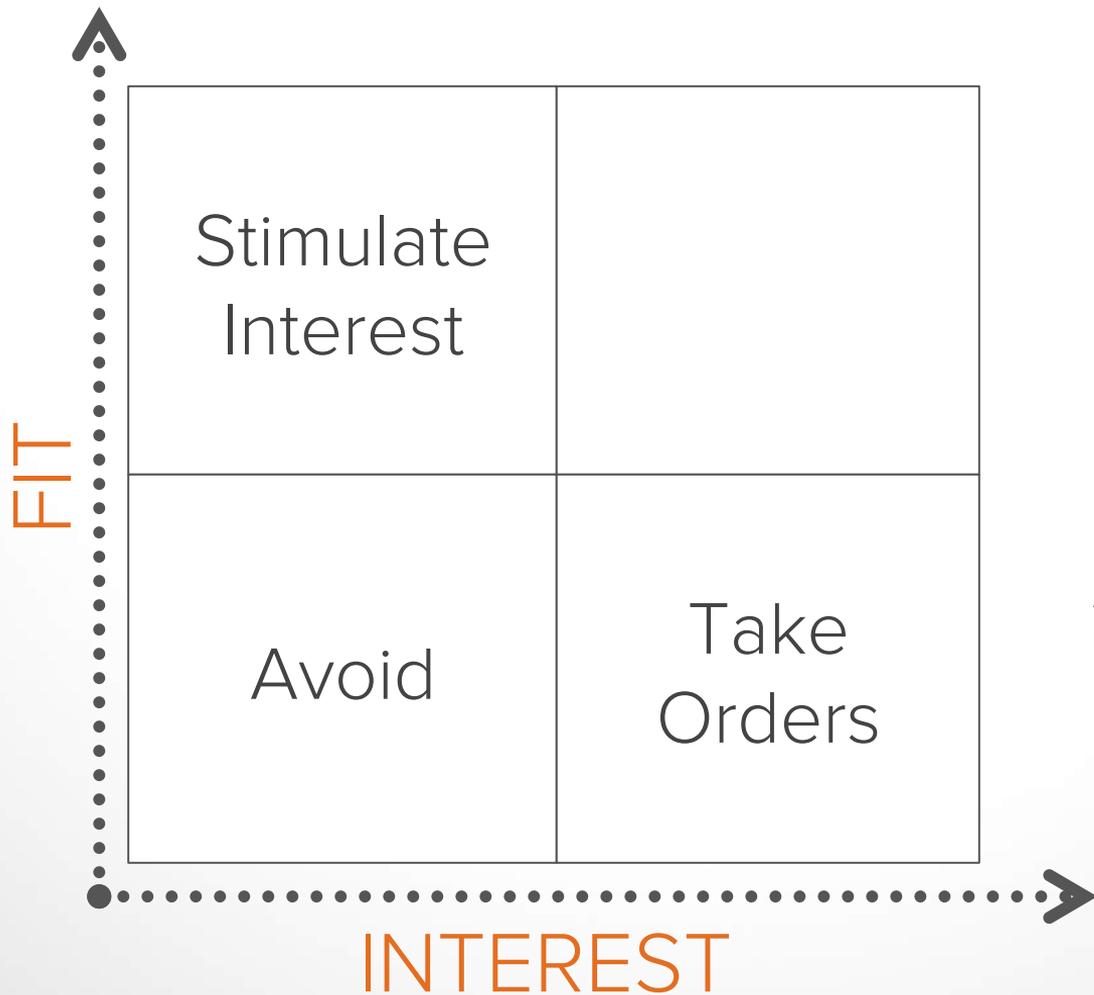
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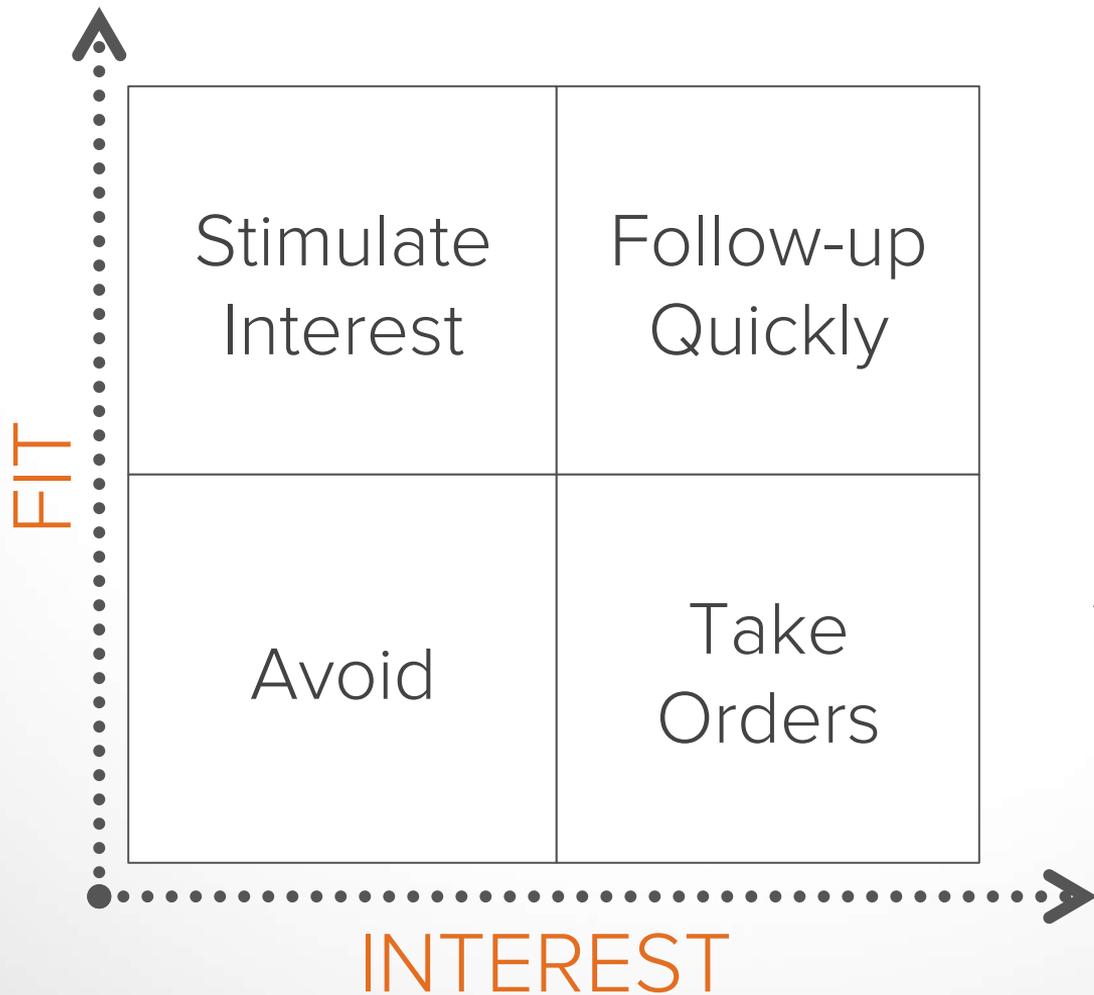
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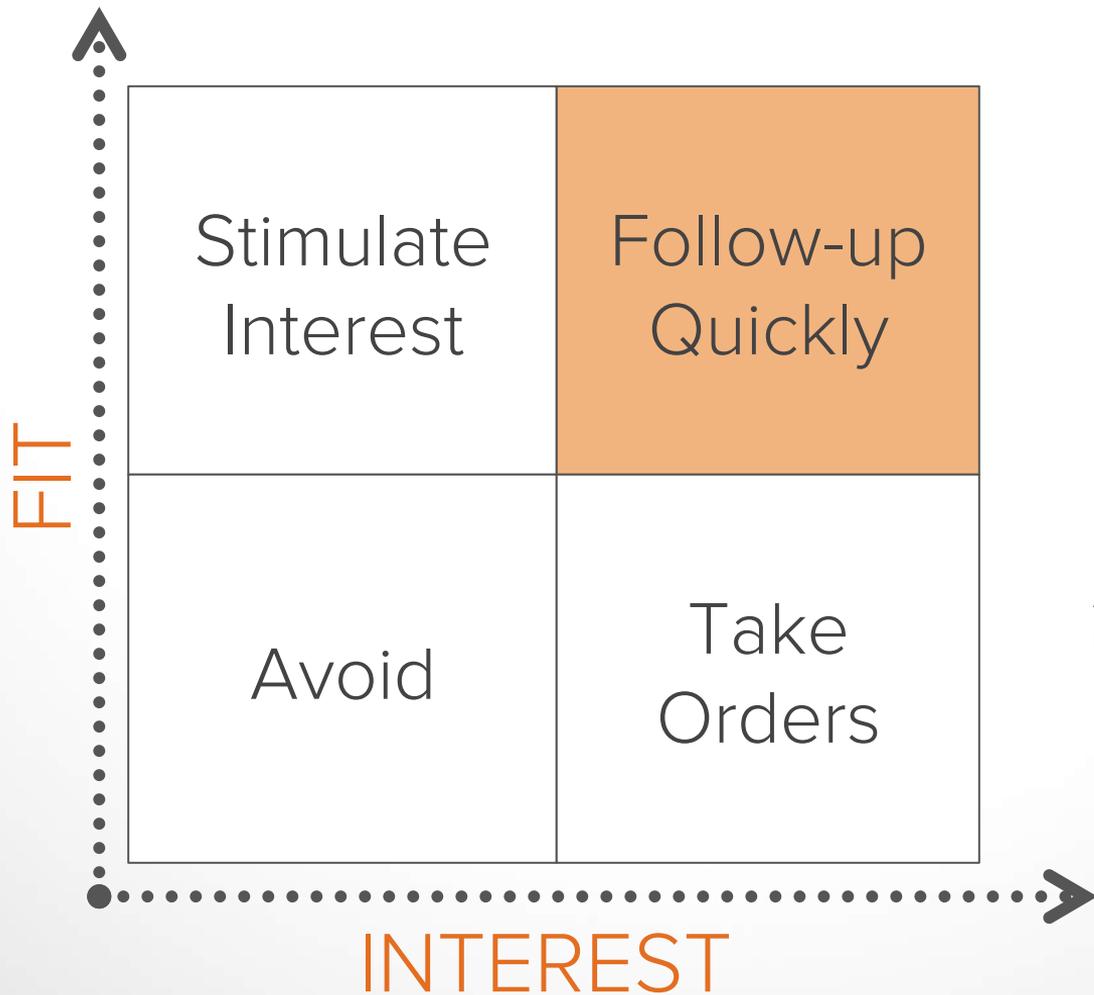
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What is a **sales-ready** lead?

A great fit lead with high level of interest.

# EXAMPLES OF SALES-READY LEADS

- Contact who **downloaded an ebook** on lead gen, company is 200-1,000 employees and in North America.
- A contact at a company in the US who filled out the form to **request a sales demo** or **started a trial**.
- A contact at a company whose role makes him/her a **decision maker**, e.g. a VP or Director.

Define the  
**handoff** process



Owned  
by  
Marketing

Owned  
by  
Sales

# Define your buyer persona



I am a...

Marketing professional that wears multiple hats

## Internal Notes

<b>Roles</b>	Marketing Manager, Marketing Director
<b>Goals</b>	Support the sales team by generating qualified leads each month.
<b>Challenges</b>	Too much to do, not enough resources, not enough time.

## Demographics

<b>Age</b>	25-50
<b>Income</b>	\$70,000 - \$100,000
<b>Education</b>	Bachelor's Degree or MBA

## Story

<b>Story</b>	Mary is a professional marketer at a mid-sized company (25-200 employees). She knows a fair amount about marketing - with expertise in areas such as tradeshow, email marketing, advertising, and sales collateral - but is not a lead generation or analytical marketing guru. She wants to learn about new, more sophisticated marketing techniques, wants her job to be easier, and wants a tool to make her seem smarter and more competent to her boss.
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# WHAT HAVE YOU DEFINED?

- Stages of the sales & marketing funnel
- What is a sales-ready lead
- The handoff process from Marketing to Sales
- Buyer personas

# 5 STEPS TO INTEGRATE SMARKETING

- 1 Speak the same language
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# ARE YOU MISSING CLOSED-LOOP REPORTING?

- Do you send leads to Sales and never hear if they were good?
- Do you end up creating and trying to manage duplicate leads?
- Do you send leads to Sales with the basic contact information without intelligence about what content those leads consumed?
- Are you unsure of the impact your marketing efforts have on revenue?

# Closed-Loop Reporting

completes the feedback loop between  
Marketing and Sales.



# CLOSED-LOOP REPORTING ALLOWS YOU TO

pass more intel to and get feedback from Sales.

- Benefits for **Marketing**
  - Get up to date contact info and status updates
  - Learn which marketing programs are working and which aren't
  - Increase Marketing ROI
- Benefits for **Sales**
  - De-duplicate leads
  - Help prioritize leads
  - Help make warmer calls
  - Increase close rate and Sales ROI



# CUSTOMERS BY MARKETING SOURCE

Measure how each marketing effort performs through the funnel over time: visits, leads, customers, as well as funnel conversion rates from stage to stage.



# CONVERSION ASSISTS

Analyze which content assists in closing customers, and surface that on your website and nurturing.

The screenshot displays the HubSpot Conversion Assists interface. At the top, it shows filters for 'All Pages', 'Viewed By Customers', and a date range of '01/02/2011 - 02/05/2011'. Below the filters is a table listing the top pages by assist count. The table has two columns: 'Page' and 'ASSISTS'. The top page is 'HubSpot | All-in-one Inbound Marketing Software' with 535 assists. Other pages include 'Overview | HubSpot's Inbound Marketing Software' (387), 'Inbound Marketing Software | Product Versions & Pricing' (269), 'Marketing Tools & Resources | Ebooks, Webinars, Whitepapers by HubSpot' (222), 'Internet Marketing Company' (221), 'All Posts | Inbound Marketing Software Success Stories | Customer Case Studies' (199), and '50 Days-Free | HubSpot Software Trial Request' (185). To the right of the table, there is a section titled 'What are Conversion Assists?' which explains that the list shows pages viewed by customers before becoming a customer. It also provides suggestions for improving conversion rates, such as writing more blog posts, promoting top pages, and aligning follow-up emails.

Page	ASSISTS
<a href="http://www.hubspot.com">HubSpot   All-in-one Inbound Marketing Software</a>	535
<a href="http://www.hubspot.com/products">Overview   HubSpot's Inbound Marketing Software</a>	387
<a href="http://www.hubspot.com/products/pricing">Inbound Marketing Software   Product Versions &amp; Pricing</a>	269
<a href="http://www.hubspot.com/marketing-resources">Marketing Tools &amp; Resources   Ebooks, Webinars, Whitepapers by HubSpot</a>	222
<a href="http://www.hubspot.com/internet-marketing-company">Internet Marketing Company</a>	221
<a href="http://www.hubspot.com/customer-success-stories">All Posts   Inbound Marketing Software Success Stories   Customer Case Studies</a>	199
<a href="http://www.hubspot.com/50-days-free">50 Days-Free   HubSpot Software Trial Request</a>	185

**What are Conversion Assists?**

Listed to the left are the pages on your website and the number of customers who viewed the pages prior to becoming a customer.

Pages with a high assist percentage have one or more of the following going for them:

- Great content that attracts more qualified leads to those pages.
- Great calls-to-action that help your visitors convert into customers.

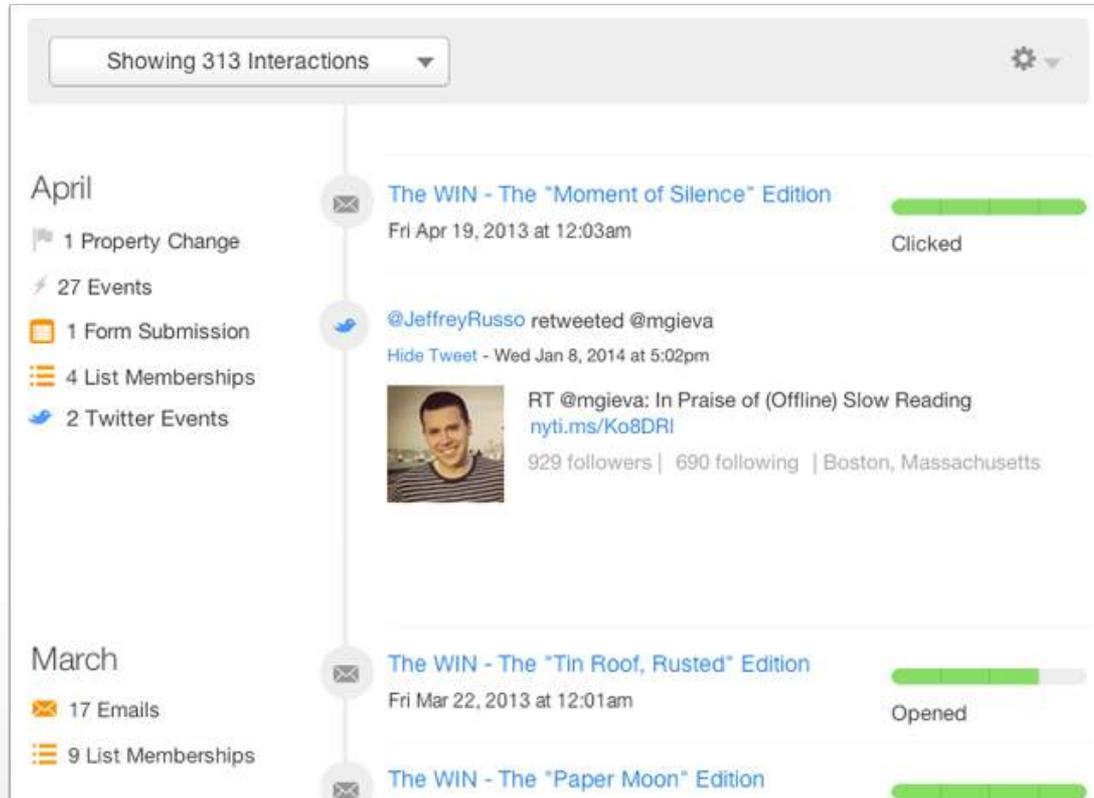
**Suggestions**

To improve your lead conversion rates, try these next steps:

- Write more blog posts like your top articles to increase the footprint of your best content.
- Promote your top pages via lead nurturing to attract more of your leads to your best material.
- Align your follow-up emails with your top content. By focusing on the topics covered in your top pages, you'll address what your leads care about most.

# CLOSED-LOOP LEAD INTELLIGENCE

Follow the interactions and conversion path of a particular contact, from the content they download, the emails they click, and other changes.



# CLOSED LOOP CRM INTEGRATION

Share interaction highlights with your sales team, make it easy for them to leverage lead intelligence, and get data on if leads convert to customers.

### Lead Detail

Lead Owner	David Miller (Change)	Lead Status	In Progress
Name	Mike Volpe	Bad Lead Reason	No
Title	CEO / Executive Manager	Reason	
Company	Acme Corp.	Reopened	✓
Record ID	00Q7000000Z0ULW	Website	acmecorp.com
Partner		Phone	123-456-7890
Partner Account		Email	mvolpe@acme.com
Time Zone	Other	Role	CEO / Executive Management

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#### ▼ HubSpot Intelligence

Generate more leads from Facebook for VNP Jun 18th 2013 - 4:04 pm	Visits: 194	Page Views: 454	Submissions: 45	<b>HUBSPOT SCORE:</b> <h1>58</h1> <a href="#">View in HubSpot</a>
HSCM-urbounce-comarketing-lead-generation-ebook-20130611 Jun 18th 2013 - 3:40 pm	Last Seen 5 hours ago through: Generate more leads from Facebook for VNP			
Free Ebook: How to Generate Leads Using Facebook Jun 18th 2013 - 3:39 pm	Became a lead 7 months ago through: 20 Marketing Trends and Predictions for 2013 and Beyond			
Generic Form with Progressive Profiling - Download Jun 18th 2013 - 3:38 pm	First seen 2 years ago via organic search through hubspot			

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#### Past Emails

- MK VSB Workflow Platypus to New 1's - Second**  
LN VSB New 1-0s and Med, High In Progress to Platypus
- MK VSB Workflow Step by Step Guide**  
LN VSB New 1-0s and Med, High In Progress to Platypus
- MK VSB Workflow Platypus to New 1's - First**  
LN VSB New 1-0s and Med, High In Progress to Platypus
- Send Email**  
Internal workflow

#### Scheduled Emails

Contact does not have any future emails scheduled

LN Campaign - SMBs

[Enroll in Workflow](#)

Contact is enrolled in 1 workflow

# CLOSED-LOOP LEAD ALERTS

Send automatic updates to your sales team when their leads revisit the website or take other key actions, to make sure to follow up at the best time.

HubSpot Lead **Revisit** Notification for hubspot.com Inbox x Print Share

 **success@hubspot.com** Jul 24 (1 day ago) Star Reply More

to me ▾

**One of your leads came back to [hubspot.com](https://hubspot.com).**  
Let's get busy.



Paula Yakubik

[paula@massmediacc.com](mailto:paula@massmediacc.com)

[View this contact](#)

# 5 STEPS TO INTEGRATE SMARKETING

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# DEFINITION OF A **SERVICE LEVEL AGREEMENT**

A Sales-Marketing SLA defines what each team commits to accomplishing in order to support the other.

The background of the slide is a soft-focus bokeh effect. It consists of numerous overlapping circles of light in shades of pale blue, light green, and warm yellow, creating a shimmering, ethereal atmosphere. The circles vary in size and brightness, with some appearing as sharp highlights and others as gentle glows.

An SLA crystallizes  
the alignment around **goals.**

# SLAs GO BOTH WAYS.

## MARKETING → SALES

Number and quality of leads required to hit company revenue goals.



## SALES → MARKETING

Speed and depth of lead follow-up that makes economic sense.



# CALCULATING THE SLA

MARKETING → SALES

How many leads of a certain quality does a sales rep need to make quota?

- $\text{Quota (revenue)} / \text{avg. revenue per customer} = \# \text{ customers needed}$
- $\text{Customers} / \text{avg. lead to customer close \%} = \# \text{ leads needed}$
- May vary by type (quality) of lead

# CALCULATING THE SLA

SALES → MARKETING

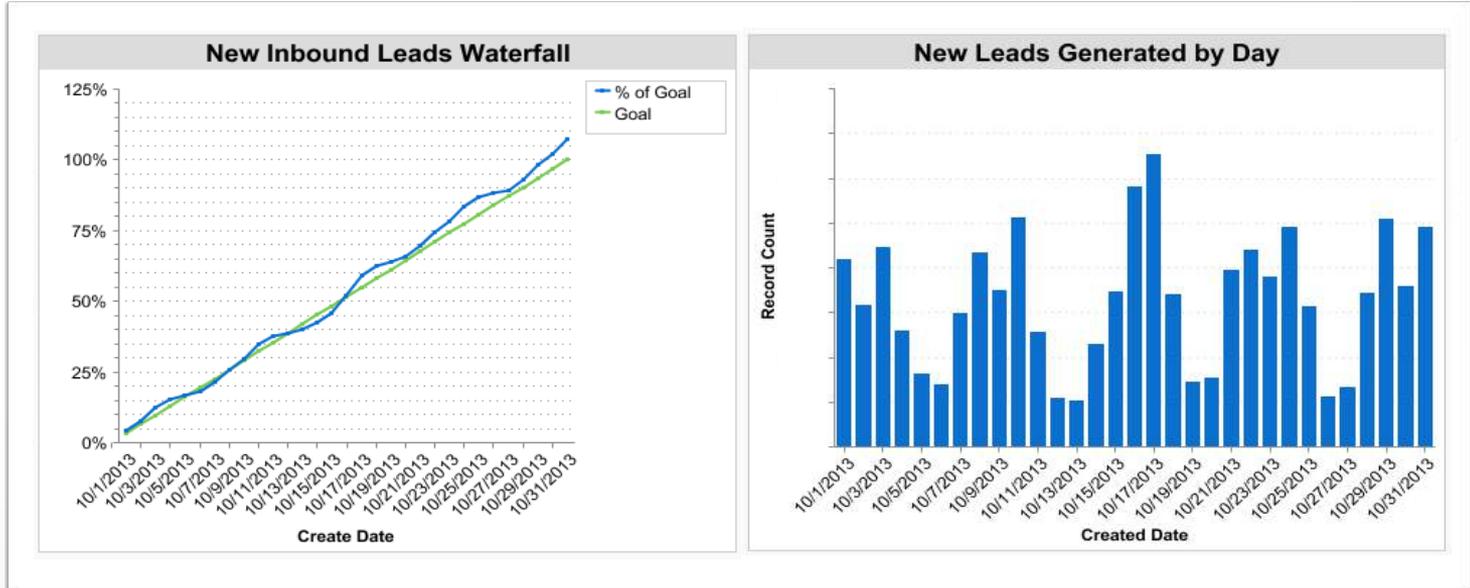
How many call/email attempts to engage should a sales rep make to every lead to not waste leads?

With **X** leads and **Y** hours/month, how many follow-up attempts should a sales rep be able to complete per lead?

# EXAMPLE SLAs

- Marketing will deliver 100 leads per sales representative, per month.
- Sales will make 1 attempt to engage in 4 business hours, with 5 attempts in 14 days.

# TRACK SLA PROGRESS DAILY



# 5 STEPS TO INTEGRATE SMARKETING

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# WEEKLY SMARKETING MEETING

Your entire Sales and Marketing teams attend to get on the same page about: team successes, product info, persona education, SLA waterfalls.



# MONTHLY MANAGEMENT MEETING

Key managers attend to discuss topics in depth and resolve issues.



Hi Elora,

I hope you're all recovered from the holiday party and are ready to rock it with marketing offers after rickng with DJ Nick S&S. Going forth, I'm going to share offers that were recently launched as well as some upcoming this week, in order to keep you in the complete marketing loop.

#### RECENTLY LAUNCHED OFFERS

- [27 Pre-Designed Calls-to-Action for Your Customization](#)



Assets: [Landing Page](#), [Thank You Page](#), [Email](#)

Launch Date: Jan. 10

Product Focus: CTA Tool

Soundbite: Changing the design of your calls-to-action can improve clickthrough rate by 138%, or more. To help you see such success, we've built 27 pre-designed CTA buttons in PowerPoint for you to customize and use! Afterwards, I'm happy to show you how you can use HubSpot's CTA tool to start collecting performance metrics for this CTA.

[Tweet this Offer](#) | [Share on Facebook](#) | [Share on LinkedIn](#)

#### EVENTS

- CMO Mike Volpe to speak for Boston Product Marketing Association in Boston, MA on Jan. 17, 2013.
- Head of Enterprise Marketing Jessica Meher to speak at EnWCo in San Francisco, CA on January 28-31.

#### LOCAL HUBSPOT USER GROUPS

Are you leveraging local HubSpot user group (HUG) meetings to close deals? Here are some great new opportunities:

- [Indianapolis](#) January 16
- [Montreal](#) January 15
- [Chicago](#) January 30

# CAMPAIGN COMMUNICATION

Market your campaigns to your sales team – share the info they need in order to be successful.



Hi Elora,

You were looking pretty fly on Friday night. The only way you could look any better would be to explain all of this week's new product features on the spot. Read on and I bet you could :)

## Progressive Profiling on the New Forms Tool

Beginning today, Professional and Enterprise customers will now have access to Progressive Profiling.

Progressive Profiling is a feature of forms that hides previously filled out fields and replaces them with new questions that a marketer wants to ask of her contacts.

Professional +  
Enterprise  
Customers Only

### Why Customers Will Love This

- Increase conversion rates by controlling form length
- Learn more about contacts each time they re-convert
- Re-use the same form across many landing pages

The Forms user interface has also undergone some changes like to all HubSpot 3 customers, including keeping the same look and feel as other COS tools. Read the blog post to see all the UI and Progressive Profiling changes in detail.



# PRODUCT COMMUNICATION

Share updates about products and services – arm the sales team with the details and why customers/prospects will care.

An office cubicle with a wooden desk. On the desk, there is a spiral notebook, a printer, and a computer monitor. A small stuffed animal is on a chair in the background. The text "Communication isn't just meetings." is overlaid in white.

Communication isn't just meetings.



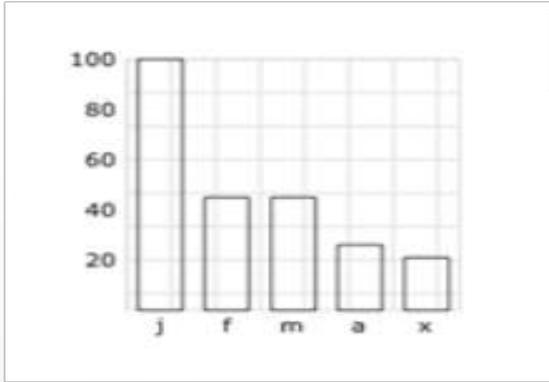
Communication isn't just  
**bullet points.**

# 5 STEPS TO INTEGRATE SMARKETING

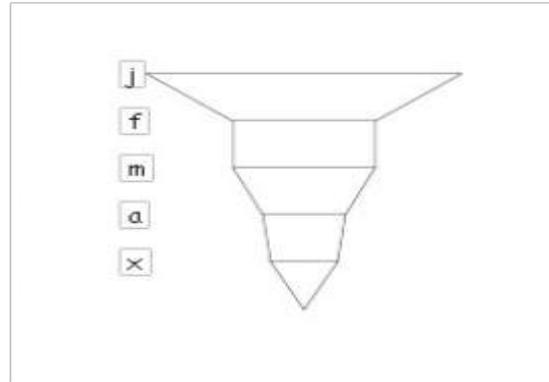
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# USE DASHBOARDS

Create and share a common dashboard with the reports aligned with the teams' goals. Check the dashboard daily and encourage individuals to fix problems.



Frequent



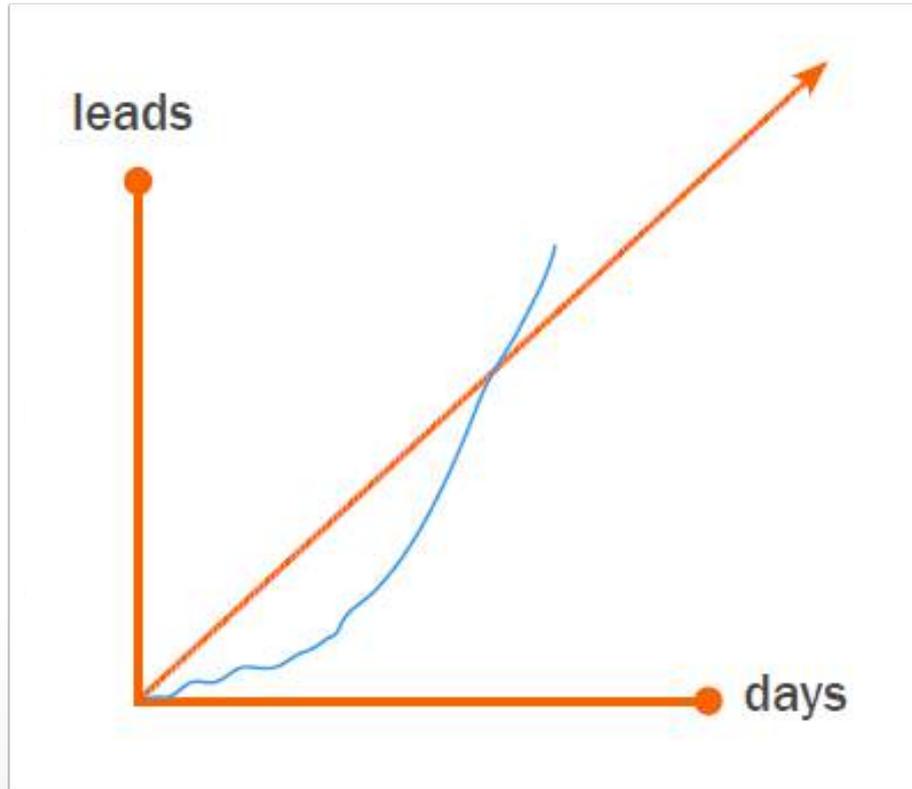
Public



Transparent

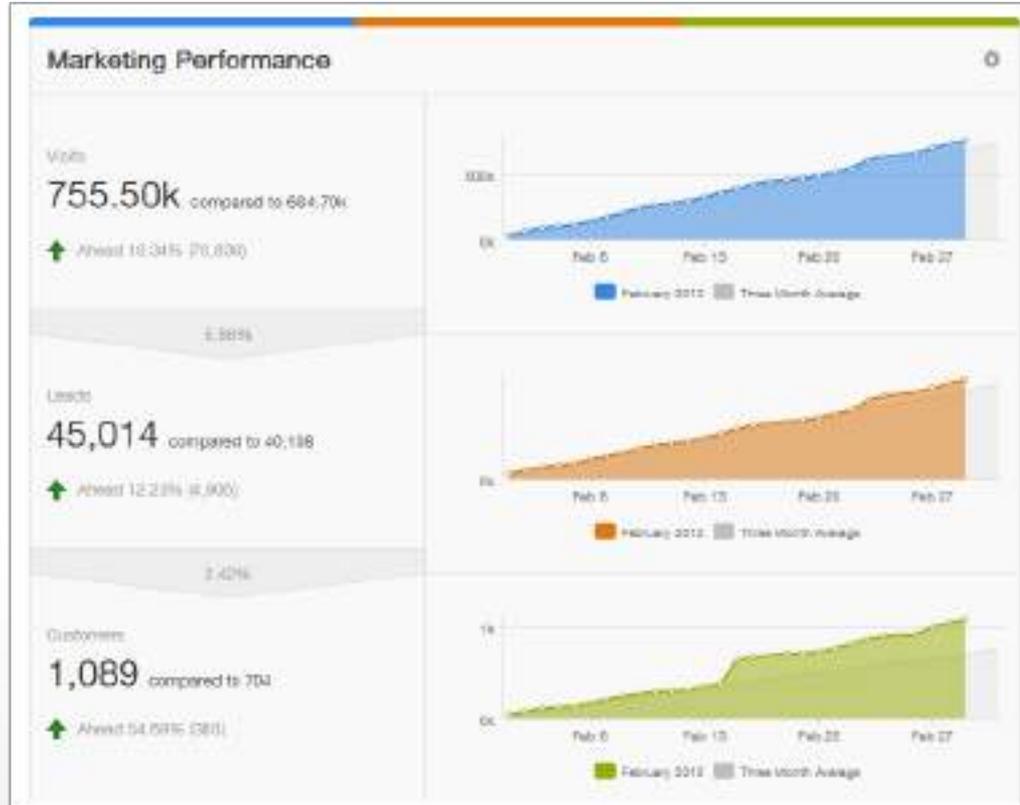
# MARKETING DASHBOARDS

Measure and communicate progress towards primary goals as agreed upon in the SLA.



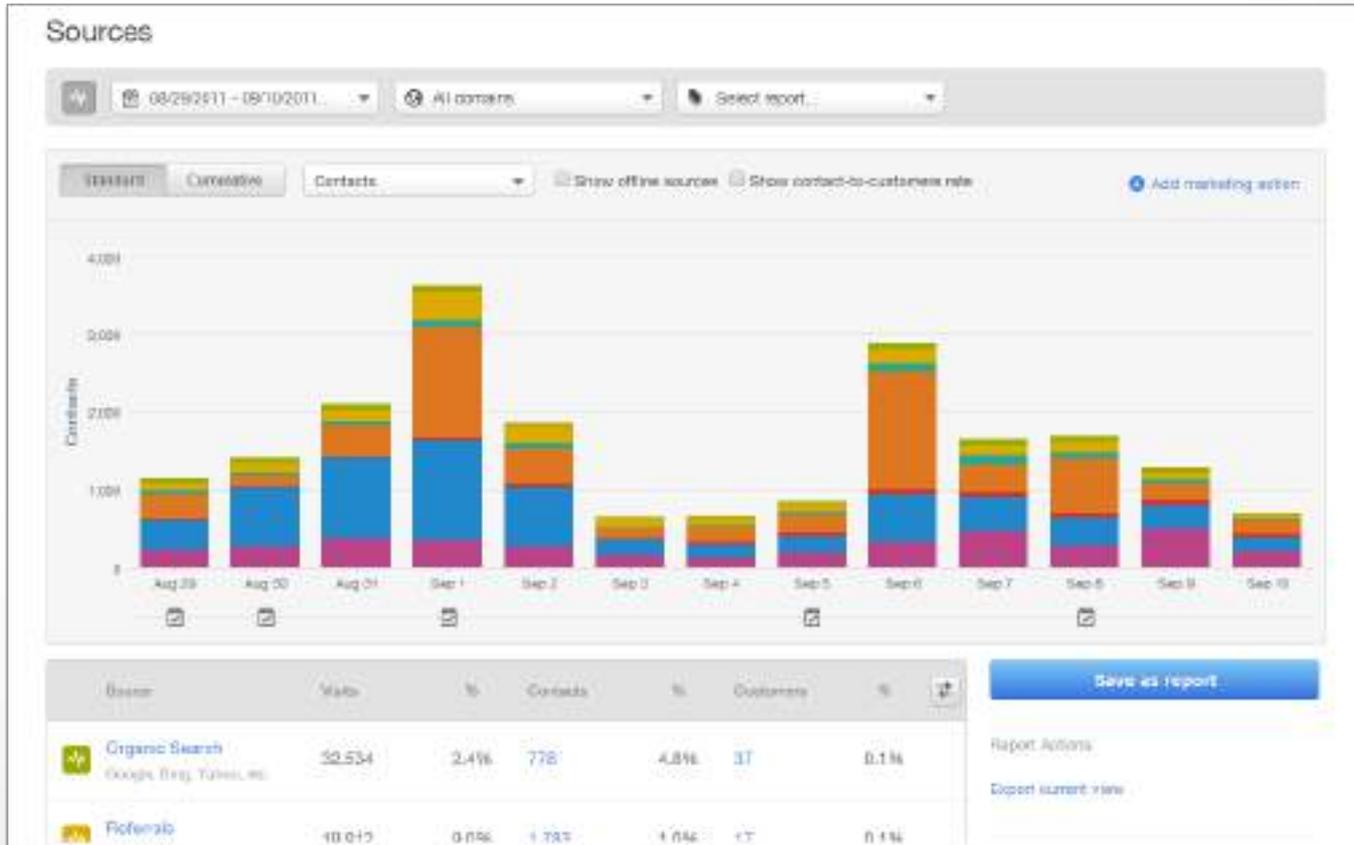
# MARKETING DASHBOARDS

Measure volume of leads or volume of quality leads against the monthly goal, and check daily to adjust.



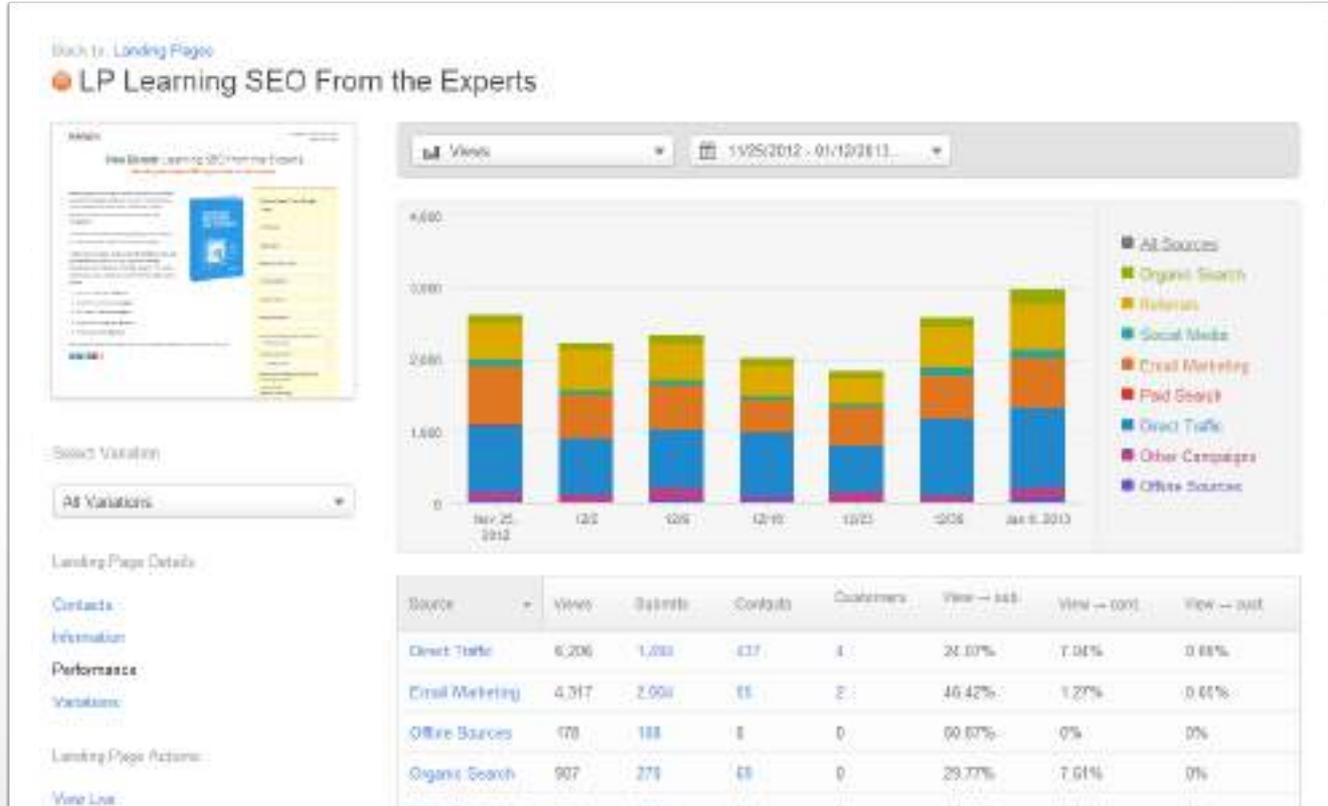
# TRACK LEADS BY SOURCE

Set goals per source and measure progress for each of your efforts.



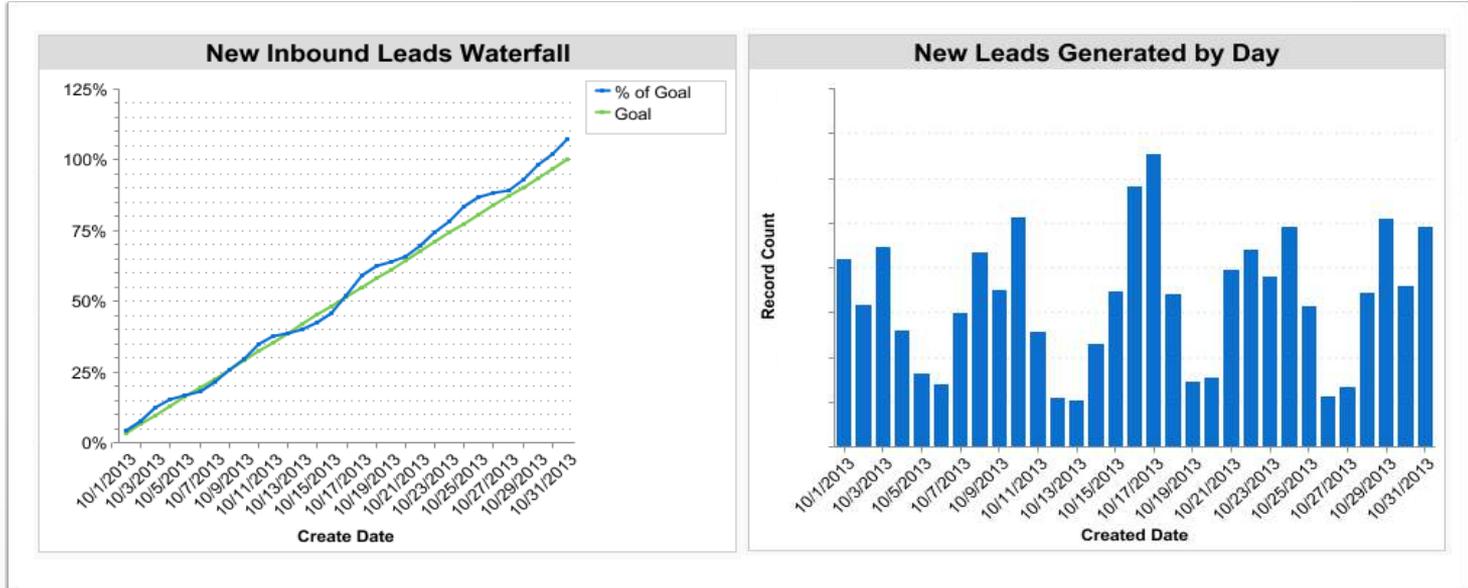
# TRACK LEADS BY CAMPAIGN

Analyze the results for each campaign – which efforts successfully drive traffic, leads, and customers.



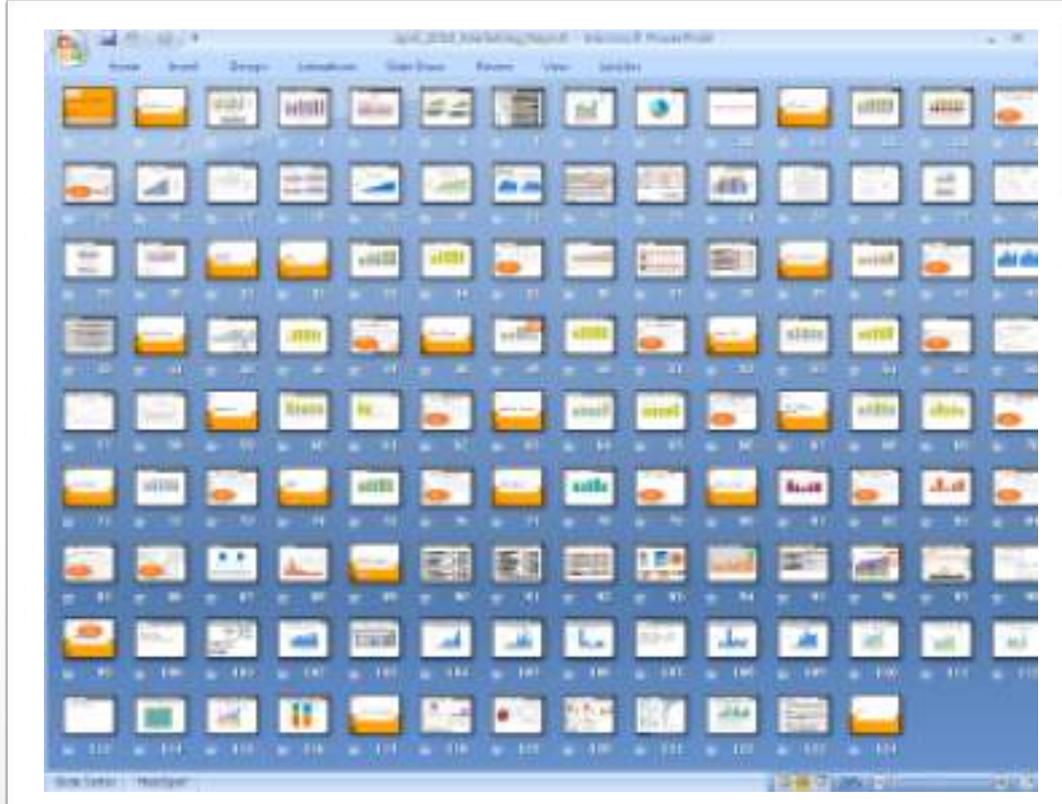
# TRACK THE VOLUME OF MQLs

Measure how many MQLs – and which types – are generated.



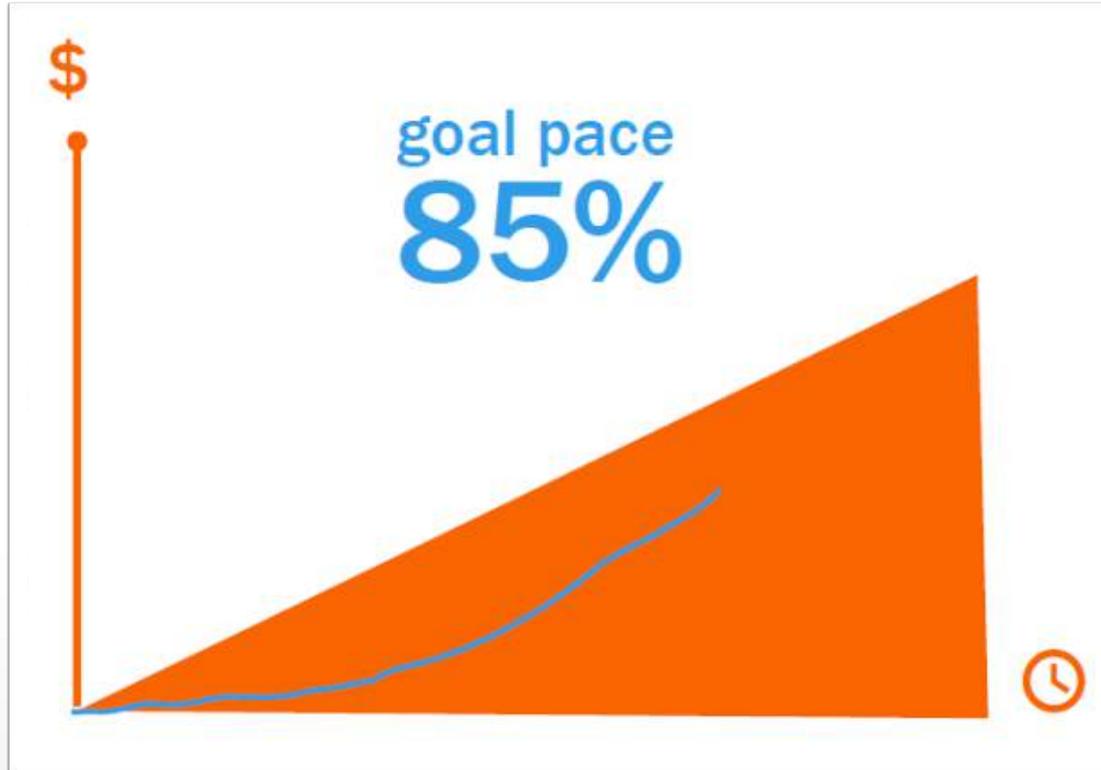
# MONTHLY MARKETING REPORT

Do a full analysis on a monthly basis to dig into all the important metrics and evaluate why Marketing did or did not hit targets. Share it across the company.



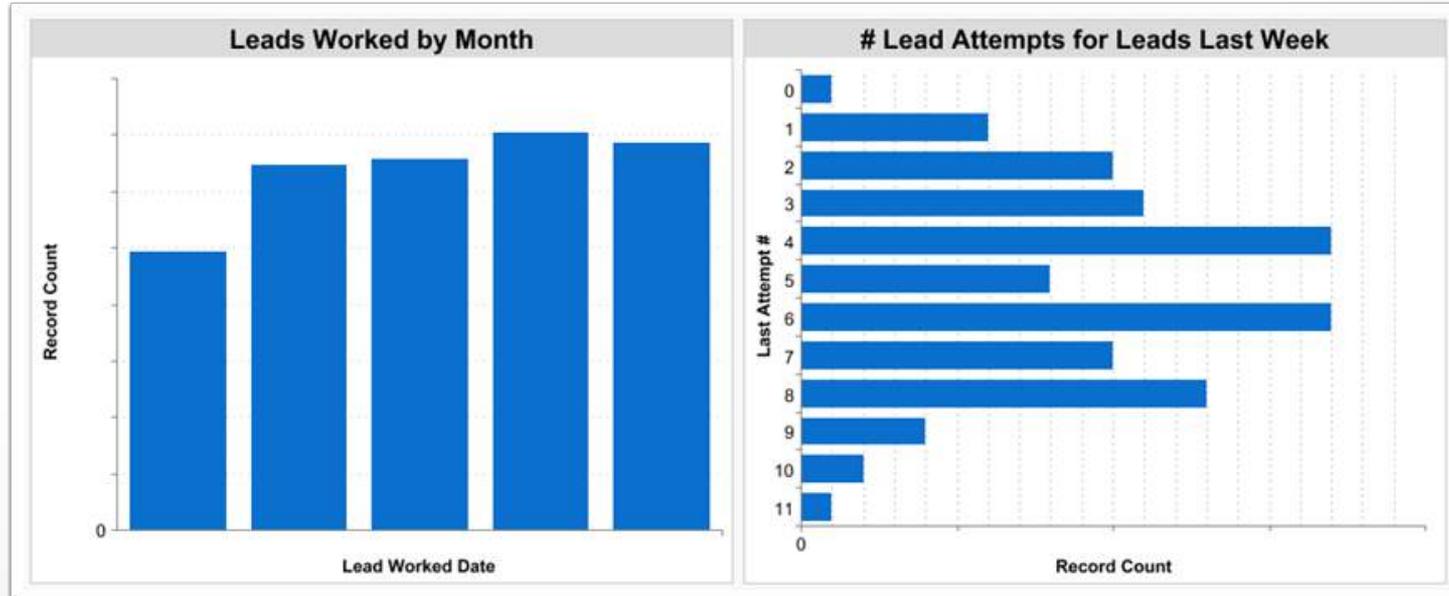
# SALES BY DAY DASHBOARD

Measure progress towards the sales goal and compare against previous month.



# SALES ACTIVITY REPORTS

Track how many and how deeply leads are worked by the sales team.



What to do  
when things  
go **wrong.**





Rely on **data**,  
not emotions.

Separate reality from perception.



What did you do the last time  
something went **wrong**?

# Remember, you're in the **same boat.**

Use data to figure out what's wrong and how to fix it.



# 4 KEY TAKEAWAYS AND RESOURCES.

# KEY TAKEAWAYS

## SMARTETING.

alignment between **sales** and **marketing** around goals and personas.

# KEY TAKEAWAYS

## 5 STEPS TO INTEGRATE SMARKETING

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# RESOURCES

- 1 [How to calculate an SLA](#) [blog post]
- 2 [Sales & marketing metrics](#) [blog post]
- 3 [Intro to closed-loop reporting](#) [eBook]
- 4 [Calculate smarketing SLA goals](#) [downloadable template]
- 5 [Plan annual goals](#) [downloadable template]