

ONE BUYER
TRUTH
TEAM

 freshworks

Why a Unified CRM is the Key to Sales and Marketing Alignment



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Steve Jobs and Steve Wozniak. Bill Hewlett and Dave Packard. Larry Page and Sergey Brin. The world is full of famous business partners.

The sales and marketing partnership should be up there with them. Sally from sales and Mark from marketing. Mark finds leads and Sally turns them into buyers. It's a match made in heaven.

But somewhere along the line, their relationship turned... toxic.

Sally started grumbling that Mark only ever sent her dud leads. Mark complained that Sally wasn't following up enough. Sally said she could find her own leads. Mark said sales reps were chasing the wrong type of buyers. Sally demanded more context. Mark pleaded for better feedback.

It was like they were speaking different languages. Sally obsessed over new opportunity figures, meetings booked, and close rates. Mark only cared about traffic, engagement, and MQLs.

When their relationship collapsed, Sally and Mark stopped talking to each other entirely. The rift grew bigger. They began acting like two people who had never met, rather than one united power couple.



Here's the thing: Misalignment like this isn't just a topic for a cheesy rom-com.

[Nearly 90%](#) of sales and marketing professionals say effective collaboration between their teams enables critical business growth. In other words, when Sally and Mark are fighting, your business isn't growing.

Revenue leaders and organizational consultants have been trying to improve sales and marketing alignment for decades.

“While there is no quick fix to solve all alignment challenges, there are some actions that both operations teams can take to improve matters for the long term,” [claimed](#) one commentator back in 2014.

“Involve sales in content marketing,” [suggested](#) another in 2016.

“Constant communication is key,” [argued](#) a third in 2018.



The fact that we're still talking about sales and marketing alignment suggests that no one's got it right. It turns out effective alignment isn't all that easy and it takes more than just involving both parties in meetings.

When you start to unpack the problem, you discover that everyone has ignored a gigantic piece of the puzzle — technology.

Often, alignment initiatives focus on communication, collaboration, and feedback. These are important — but if your technical foundations aren't perfect, it's all for nothing.

But that's all about to change.

In this eBook, we'll unpack the challenges standing in the way of sales and marketing alignment. We'll explore how legacy systems are sabotaging Sally and Mark's relationship. And we'll investigate a new generation of technology poised to revolutionize how the pair work together.

But first, a quick question: Why should you care about sales and marketing alignment?

The answer? Performance, revenue, and growth.



**Misalignment is
burning money**



1

Misalignment is burning money

Through the late-1990s and early-2000s, IBM's sales and marketing teams operated entirely independently of one another.

According to senior executives Anil Menon and Dan Pelino, IBM's sales reps only worried about fulfilling product demand, not creating it. And its marketers failed to link ad spend to closed sales, so no one knew the actual impact of campaigns.

Worse, because the computing giant's go-to-market teams were so poorly coordinated, marketing often announced new products without checking if their sales colleagues were prepared for a significant influx of inquiries.

In short, it was chaos.

But it didn't stay that way. IBM's leadership team resolved to align sales and marketing by merging them into one team. When sales reps and marketers joined forces under one team, everything changed.

“There is no question that, when sales and marketing work well together, companies see substantial improvement on important performance metrics: Sales cycles are shorter, market-entry costs go down, and the cost of sales is lower,” wrote researchers from Harvard Business Review. “That’s exactly what happened when IBM merged its siloed sales and marketing teams into one well-aligned organization.”

It's easy to brush off alignment as some kumbaya approach to business. But as IBM's accomplishments illustrate, the impact of sales and marketing alignment goes well beyond creating a harmonious workplace. When Sally and Mark work together as one team, they produce outstanding commercial results.

According to B2B marketing consultants, MarketingProfs, aligning sales and marketing drives [38%](#) higher sales win rates and [9.9%](#) higher customer retention rates.

Better sales performance ladders up into stronger overall growth. B2B organizations with closely-aligned sales and marketing departments experience [24%](#) faster three-year revenue growth and [27%](#) faster three-year profit growth, says research from SiriusDecisions.

Ignoring alignment doesn't just mean missing out on these sorts of benefits. When Sally and Mark are at war with each other, your revenue can shrink.



When the Forrester Research analyzed alignment and company performance, they found that alignment laggards experience, on average, a [7%](#) decline in company revenue.

Poor or ineffective alignment feels like an insidious performance woe — but it's not. LinkedIn's Moments of Trust survey revealed that an astounding [90%](#) of revenue professionals know they are misaligned across strategy, process, content, and culture.

That poses an interesting question: If we agree that alignment is essential to business growth and we know that we're misaligned, why haven't we fixed it?

It comes back to the underlying challenge we highlighted at the start — technology.

As you're about to see, a lot of the friction between Mark and Sally stems from the patchwork system of tools they use.



**Clunky, complicated,
and absurdly
overpriced**



2

Clunky, complicated, and absurdly overpriced

Sally and Mark live and work in two totally different technology ecosystems. Sally has individual tools for sales intelligence, enablement, engagement, and analytics. Meanwhile, Mark works across separate acquisition, communication, and marketing operations services.

What that means is they produce two different views of the same buyer.

Consider a prospect who signs up for a webinar, downloads an eBook, and reads every email Mark's nurture campaigns send him. The marketing systems track all of those interactions. To Mark, the prospect looks engaged, active, and red hot.

But if Sally doesn't have access to that behavioral and engagement data, she has a completely different perspective. She might look at the buyer's firmographic data and discount them as a low-quality lead.



Their fractured technology also undermines their customer experience.

If Sally can't access a prospect's background information, she's going into meetings blind. Instead of picking up the conversation from wherever marketing left it, she's starting again from scratch.

For buyers, this is an awful experience. Instead of enjoying a seamless, personalized experience from start to finish, they're dealing with two entirely separate organizations, neither of which is tuned in to what the other is doing. The buyers are repeating themselves, answering the same questions, and struggling through the repeated processes and workflows.

It's infuriating — and frustrated customers won't hang around.

Modern buyers rank customer experience as [more important](#) than both price or product. So when your sales process feels clunky, your meetings booked metric will plummet and your win rate will drop off a cliff.

The disruption flows up into the C-suite, too. Instead of hearing one harmonious voice, CROs, CEOs, and CGOs receive two sets of contrasting data — one from Sally and one from Mark.



But none of this is Sally's or Mark's fault.

The technology they use is setting them up to fail.

Legacy systems are infamously clunky, overly complicated, and absurdly overpriced. The reality is that few of the systems were ever meant to work together. Organizations stitch them into one Frankensteinish monstrosity.

And convoluted, piecemeal systems are not easy to maintain. Organizations will pour resources into operational design and maintenance, trying to customize and integrate systems. In the end, the solution becomes so complex that businesses need to hire full-time employees to babysit the software.

Businesses soldier on with their makeshift platforms and end up with disjointed customer data, no actionable insights, and unhappy teams. That undermines internal collaboration and productivity, leading to poorer performance.

But it doesn't have to be that way.



One buyer.
One truth.
One team.



3

One buyer. One truth. One team.

Sally and Mark deserve better technology. They deserve a platform that can unite their fractured sales and marketing systems into one product. They deserve something that can bring their teams together, foster understanding, and help them collaborate better.

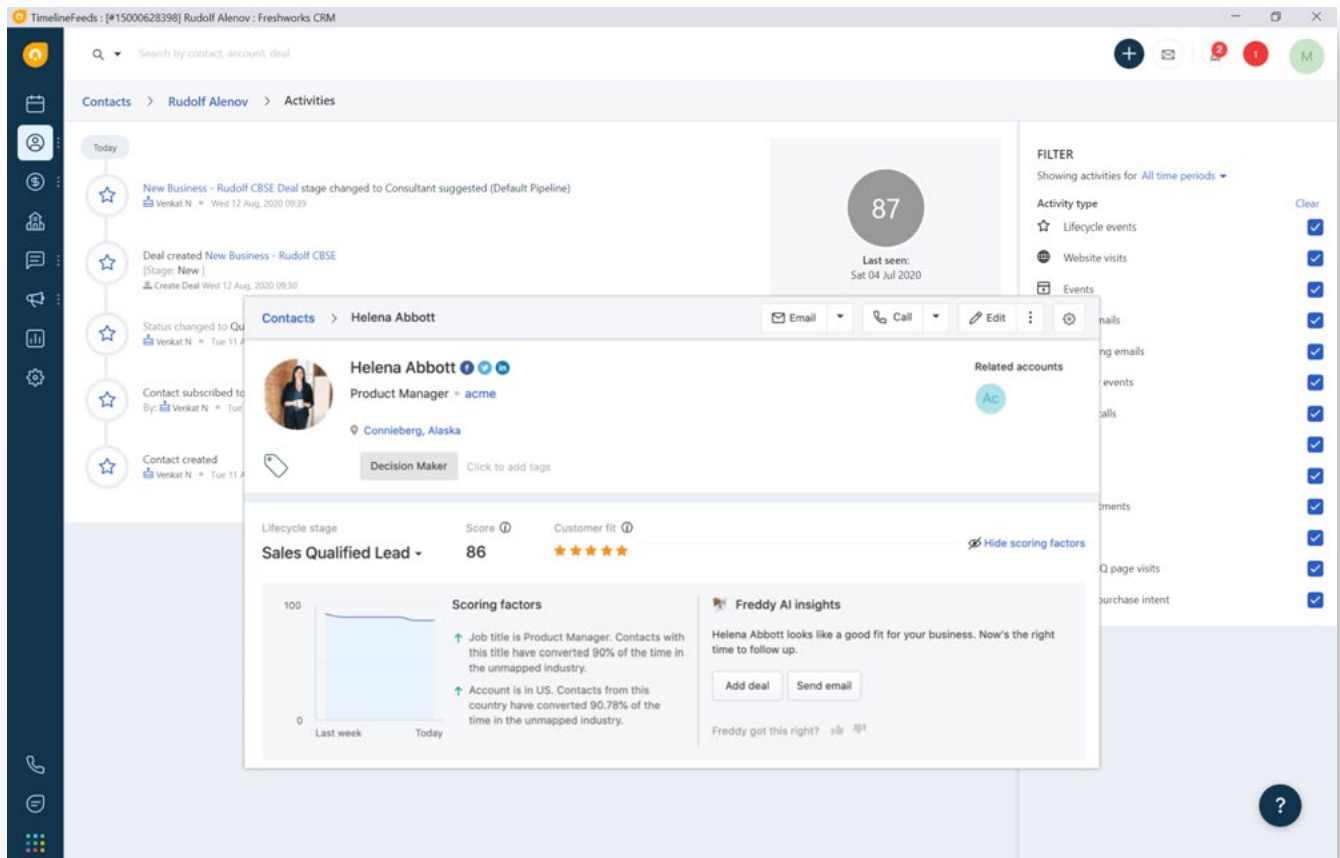
They need something that can nurture customers for life — from the first second they contact a vendor to the moment they retire.

They need a unified solution for sales and marketing teams.

This new generation of technology is an AI-powered customer relationship management platform that combines the power of sales automation, marketing automation, chat, and telephone. It's everything Sally and Mark need in one solution.

With a unified CRM, Sally and Mark stop operating with different versions of the same buyer. There's one buyer and one buyer only. The technology creates a single source of truth for your information across all teams. Instead of having data fractured and siloed, every piece of transactional, behavioral, and engagement data lives in the same place.





When they have a shared workspace, Sally and Mark can stop acting as separate departments. They can come together to provide one seamless customer experience, focusing on the entire customer journey and earning a customer for life.



A glimpse of the future



4

A glimpse of the future

After countless years spent stuck in legacy systems, it's difficult to imagine how different a unified solution is. So allow us to paint you a picture.

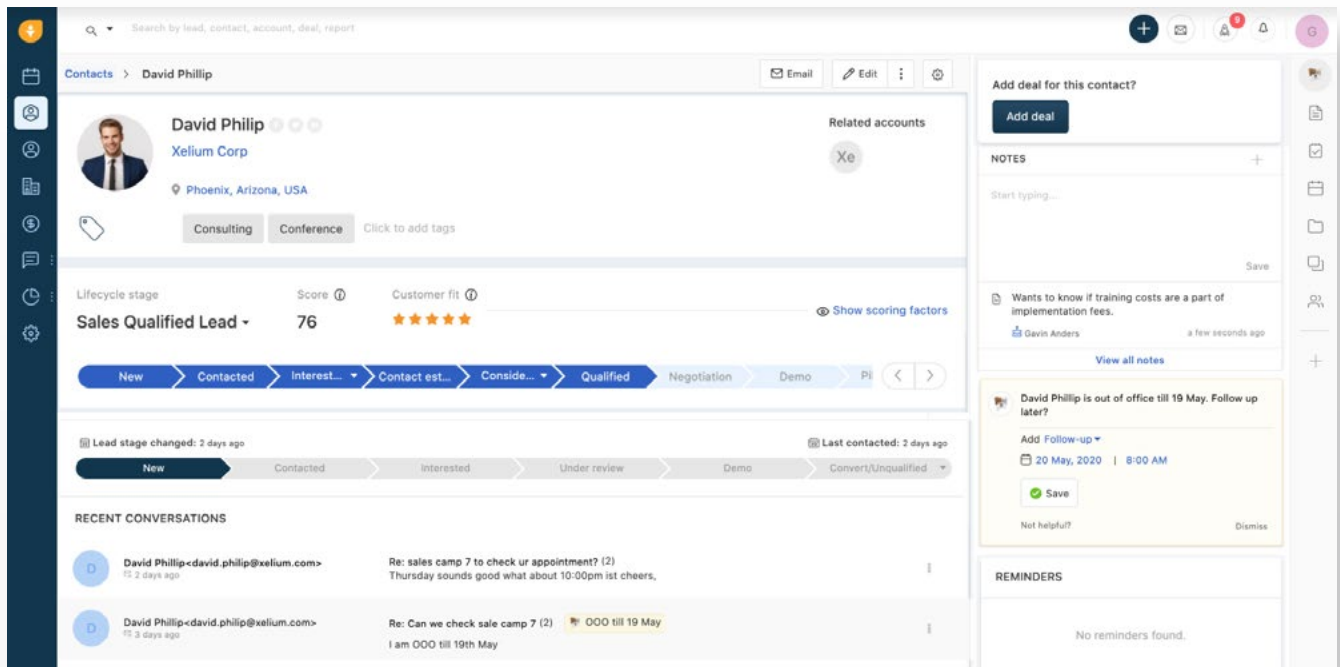
Effortless marketing automation

Let's say Mark and Sally work at a SaaS company that sells project management tools.

Mark runs a lead generation campaign, attracting new traffic from social media, paid search, and email marketing. One prospect lands on his site and downloads an eBook on organizational strategy. After reading the book, the prospect chats with a marketing rep via live chat about some of the book's themes.

From there, the prospect drops into a personalized nurture campaign, tapping into all the contextual data surrounding the prospect. Automated emails nudge the prospect down the funnel. Eventually, the system highlights the buyer as a marketing qualified lead and passes them off to sales.

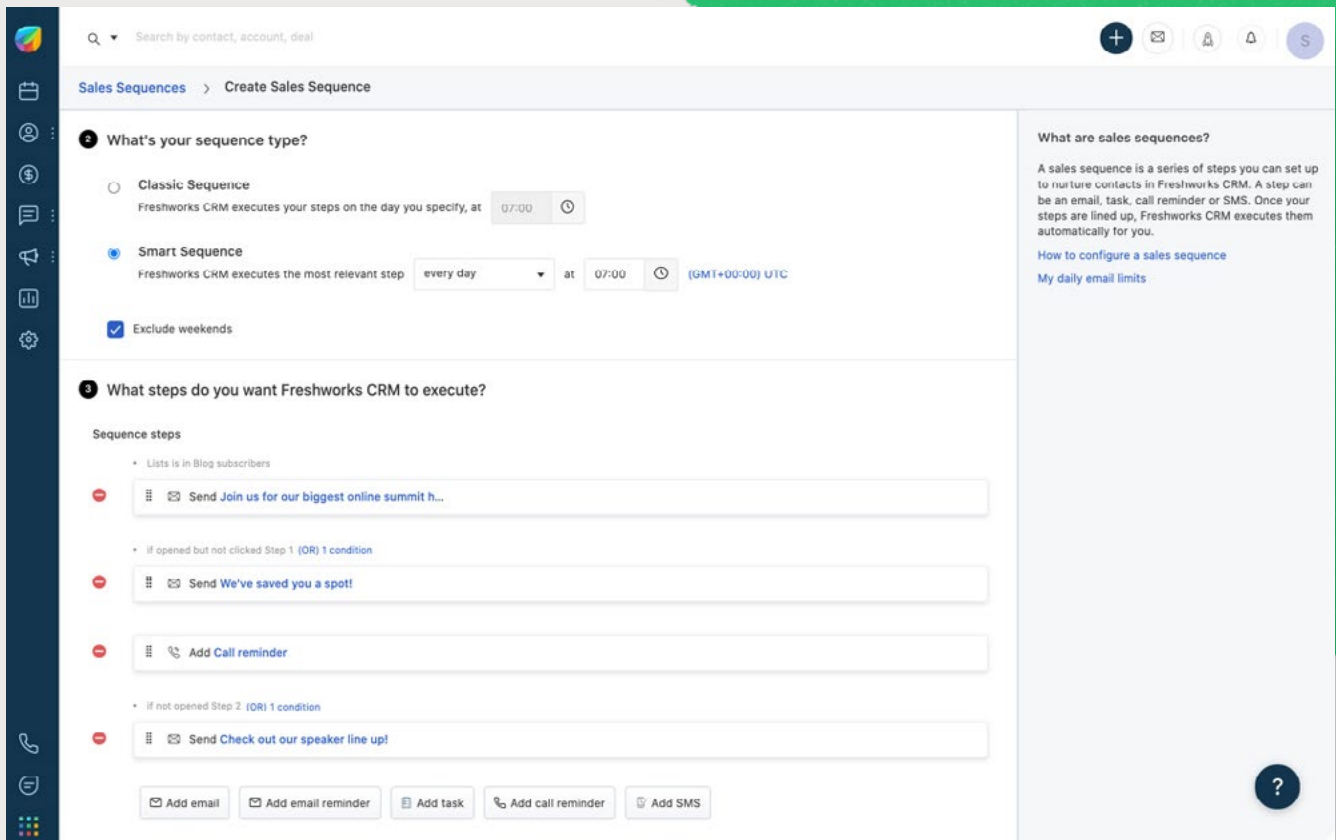




Seamless transition to sales

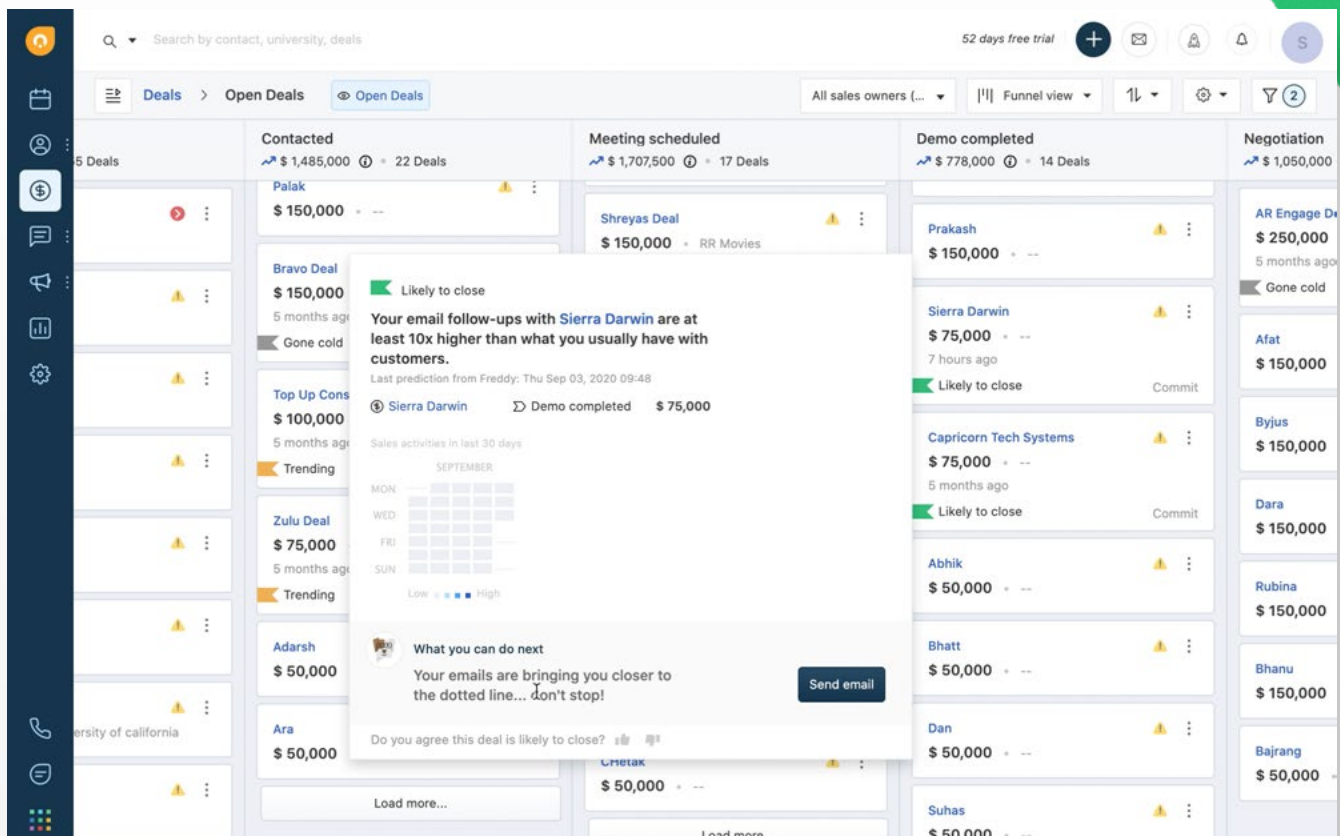
The aforementioned lead falls into Sally's inbox. Unlike before, she has access to the prospect and all of their data. She can see their lead generation channel, the eBook they downloaded, the conversation they had via live chat. She uses that context to build a personalized transactional email campaign.





At every stage, the CRM's built-in AI is whirring away behind the scenes.

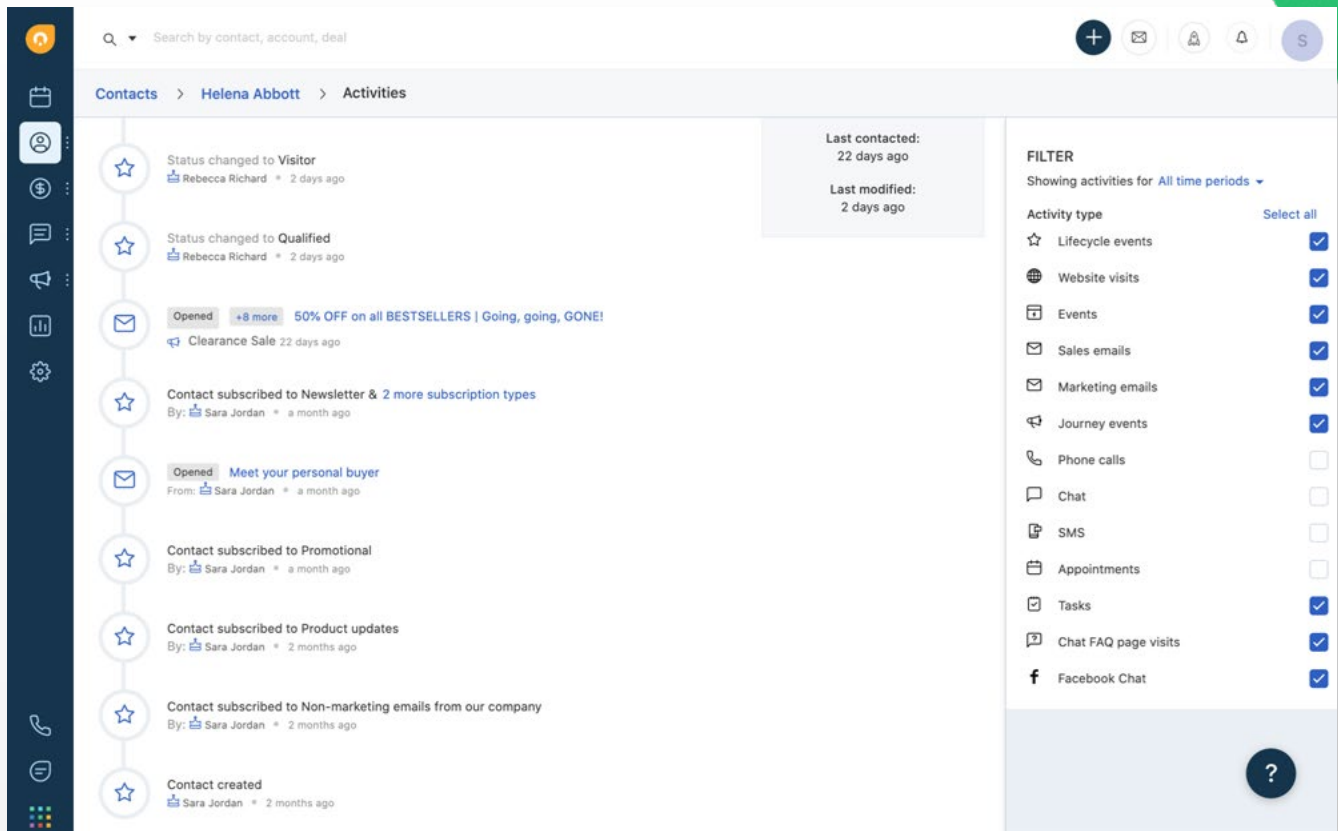
It calculates contact score and customer fit by finding patterns in historical contact properties, email opens and response rates, and website and in-app activities. It analyzes the prospect's interactions and suggests the most effective next step — an email here, a phone call there, perhaps share some sales collateral.



Having access to a 360-degree view of the prospect and an AI co-pilot supercharges Sally's sales work. The prospect flies through the sales funnel and converts into a customer.

Keep the conversation going

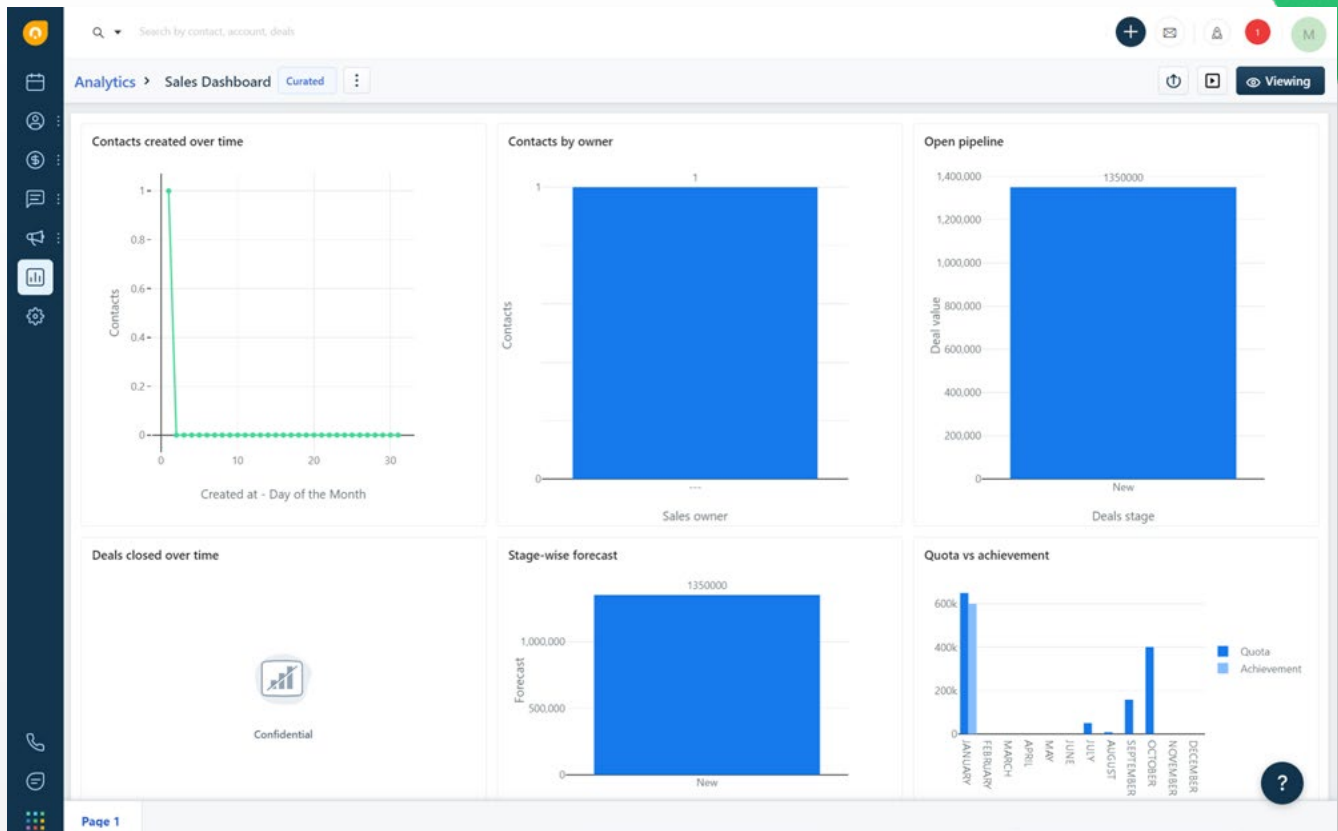
After the deal is done, the CRM keeps delivering value. Customer success can step in and take over the conversation. Instead of tabbing between a dozen different services to get up to speed, they have every last piece of transactional, behavioural, and engagement data at their fingertips.



Marketing and sales can join forces to help each customer grow. Instead of dividing the customer journey into discrete sections, your go-to-market teams can come together to deliver personalized onboarding, support, and education. Every stage in the customer journey flows seamlessly into the next like one natural conversation.

Turn data into actionable insights

CRMs deliver powerful sales goals and analytics because all your data is in one place. You can analyze performance, set periodic goals, and track progress. Keep your team motivated and accountable to drive growth, create customizable visual reports to measure your KPIs, and put them up on your dashboard for a bird's-eye view with productivity.



Sales and marketing become one team

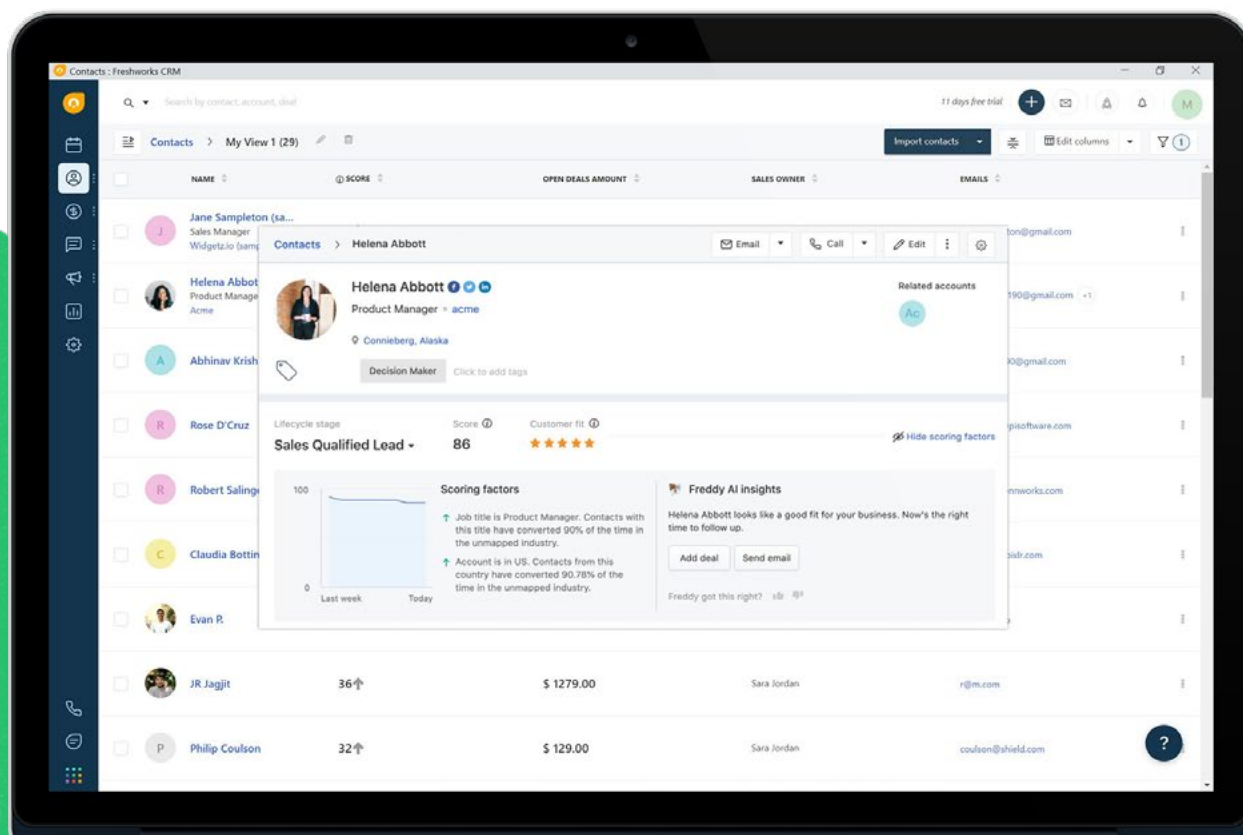
With better technology, Sally and Mark can finally understand each other. When they work from one shared platform, they stop seeing two versions of the world. When they look at a buyer, they see the same person, context, and data.

With a shared understanding, their relationship thaws. They learn to communicate, collaborate, and share. Instead of fighting against each other as opposing teams, they join forces as one united revenue organization.

Your sales force needs a better CRM

The Freshworks CRM acts as a single source of truth for your business and provides a 360° view of your customer, by capturing and combining customer experiences in one place. As they work together to provide one seamless customer experience, you don't just win a customer. You earn them for life.

Find out why more than 40,000 customers already trust us and [try the Freshworks CRM today.](#)



Take advantage of the unified customer view in your CRM

By now, you know you can reap great rewards by implementing a unified customer view. Let's recap the benefits:

- 1** You'll get an instant, unified customer view in one place. No more jumping between tools!
- 2** Take advantage of AI-powered contact scoring so you can focus on building relationships and optimizing your sales cycle.
- 3** Use the visual sales pipeline to collaborate with sales reps and assist them in key moments during the sales process.
- 4** Track how your customers use your product and optimize it for maximum retention and enhanced customer experience.
- 5** Turn your website into a lead- and revenue-generating machine by tracking user behavior and tailoring your marketing to your user's actions.

Need help making this a reality?

You'll love Freshworks CRM. It allows you to find the best leads, close more deals, and nurture existing customers—all from one platform.



Freshworks CRM helps break internal silos and deliver personalized experiences across marketing and sales. The AI-powered CRM enables sales and marketing professionals to better understand customers with the right customer insights at the right time across each touchpoint. The CRM includes salesforce automation, marketing automation, chat, and telephony all in one solution. [Signup for a free trial of Freshworks CRM today.](#)

