



The Chartered
Institute of Marketing

2011: BUILDING ON



YEARS OF
MARKETING
AND SALES
LEADERSHIP



**Marketing
and sales
fusion**

Foreword

Marketing as a discipline has its roots in sales. Over time, due to the ambitions of the new science of marketing, the two became separate and in many cases, estranged.

This White Paper explains why, in our centenary year, we believe it's time for The Chartered Institute of Marketing to say *mea culpa* and to try and make amends: after all, it has been argued by some that we effectively turned our backs on the sales profession with our change of name back in 1963 when The Institute of Marketing and Sales Management transformed itself into The Institute of Marketing. We feel there's no time to waste in burying the hatchet so that marketing can evolve from a discrete, some sales professionals might even say elitist, discipline to reunify with sales. There is inescapable evidence why businesses will benefit enormously if we bring them back together.

This is a philosophical argument, not a practical guide. We wish to open a dialogue (however robust this may become) and because it is about the "bigger picture", we are particularly keen to reach out to UK PLC, whose buy-in to this cultural shift is critical.

We draw extensively on leading thinkers and practitioners to set out a powerful case for what we hope you will agree is a great opportunity to open up an avenue that, some might contend, we were once foolish enough to close off.

As Philip Kotler, Neil Rackham and Suj Krishnaswamy said in what surely deserves to be seen as a seminal paper entitled *Ending the War Between Marketing and Sales*, "Salespeople accuse marketers of being out of touch with what customers really want or setting prices too high. Marketers insist that salespeople focus too myopically on individual customers and short-term sales at the expense of longer-term profits. Result? Poor coordination between the two teams – which only raises market-entry costs, lengthens sales cycles, and increases cost of sales".¹

Is it time to say "Enough!"? The debate starts here...



David Thorp
Director of Research and Professional Development
The Chartered Institute of Marketing

Marketing and sales fusion

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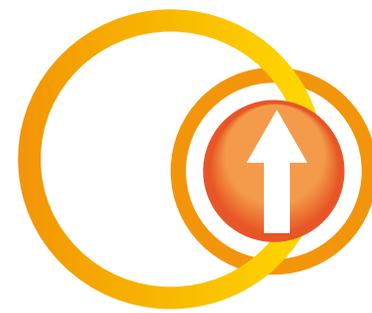


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EXECUTIVE SUMMARY

Marketing and sales fusion



In 10 years from now there will be no such thing as separate marketing and sales departments. There will be one team comprising two interdependent disciplines. This is a vision that we believe has much to recommend it.

Although this requires a major shift in thinking, the concept is not as radical as it sounds. A century ago, The Chartered Institute of Marketing began life as a sales organisation. Over those 100 years, the two disciplines gradually fragmented. The result – as outlined in countless academic papers – is, at best, an on-going battle and, at worst, a war.¹ Even in companies where the two disciplines seem friendly enough on the surface, distinct marketing and sales departments inevitably slip into silo thinking, rife with the kind of subtle conflict which holds back business.²

The CIM takes full responsibility for our part in encouraging marketing to carve out its own niche, but now – to mark our centenary year – we feel it's time to hold up our hands, express a measure of regret, and recognise that both distinctive professional areas can better move ahead together, not apart. Furthermore, we want to put some meat on the

bones of our apology by addressing this problem for the greater good of UK PLC.

In many ways, this is a problem that can no longer be ignored. Both online and offline, the boundaries between marketing and sales activities are becoming increasingly blurred and companies who ignore this, and continue to treat them as separate and independent entities, will appear out of touch and pay a high price in loss of business opportunities. Marketing's reputation will suffer too, with the discipline inevitably reaching the end of its path with no way of moving forward. In the current economic climate – with marketing already being relegated in many organisations and with even tougher times predicted for the UK's future – this is not a welcome option.

The good news is that extensive evidence shows that aligning the two departments leads to better productivity, reduces duplication and

wastage, improves staff motivation and increases customer satisfaction.¹ This is as relevant for B2C as it is for B2B sectors.

“while the sales mission has not changed, the marketing mission has.”

Having a unified department, concludes Giorgio Delpiano, General Manager Sales West Europe and South Africa at Shell, is “essential to drive growth.” Indeed, a study in cooperation with Northern Illinois University found that organisations with a strong alignment between sales and marketing performed better, with more new customers, higher client retention, improved sales figures and better average order values than those companies with looser alignment.⁴ The belief that “we are in it together” helps each discipline appreciate the value added by the other discipline to their activities, and recognise the constraints under which they are operating, confirms Avinash Malsh.²

“My data suggest that while it takes time to build *esprit de corps*, when achieved, it helped firms overcome many challenges,” he says.

It's easy to see where, how and why things go wrong. At the level of small business it's not generally an issue because there is usually no formal marketing function. It may not even be an issue when a marketing person or two is brought in to help relieve the sales force. This person conducts research to calibrate the size of the market, choose the best markets and channels and determine potential buyers' motives and influences. But as companies become larger and more successful, they realise there is more to marketing than setting the four Ps: product, price, place and promotion. It is decided that effective marketing calls for people skilled in segmentation, targeting and positioning – and it is once companies hire marketers with these skills, that marketing tends to become an independent player and starts to compete with sales for funding.¹ “While the sales mission has not changed, the marketing mission has. Disagreements arise. Each function takes on tasks it believes the other should be doing

EXECUTIVE SUMMARY Marketing and sales fusion

but isn't," reports Kotler.¹ Before you know it, senior management describes the working relationship between marketing and sales as unsatisfactory – characterised by lack of communication, underperforming and over complaining.

The CIM believes this situation is not inevitable. With a top-down focus on keeping marketing and sales together rather than separate, the two functions can work in a genuinely coordinated way, boosting both top-line and bottom-line growth.

Nobody expects businesses to throw out all the furniture on a Friday afternoon ready for an entirely new way of working on Monday morning. Yes, the cultural shift that's required is significant, but the first step is to recognise the need for it. Only after this philosophical breakthrough in UK PLC thinking can the consequent structural changes make a lasting difference. The result will be the ability to present marketing and sales in a far more commercial light, and businesses that are more streamlined, profitable and future-proof.

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SECTION ONE

History



A hundred years ago you'd have been met with a blank look if you mentioned the term marketing. Sales was the only game in town and it incorporated everything we now call marketing. What became The Chartered Institute of Marketing was originally called the Incorporated Sales Managers' Association (ISMA).

Fast forward to the 1950s and a more strategic, longer-term arm of sales started to flourish. In other words, the discipline of marketing was born and by 1961 ISMA added the term to its title, becoming the Institute of Marketing and Sales Management. It was, it said, "... aware of the change in international thinking, from a single selling action to the wider concept of marketing as the management operation embracing all activities concerned with the relationship between user and producer".³

In *The Profit Maximization Paradox*, Glen Peterson explains that the changes in the competitive marketplace in the 1950s – notably the explosion of choice for customers – pushed marketing and sales into separate departments.⁴ But whilst in theory, the change was a logical response to changing times, in practice, marketing went off in its own direction.

By 1963, even the Institute had resolved to drop the word sales from its name, becoming The Institute of Marketing. "The proposal for this change in name..." stated the Council's Report to Members in 1964,³ "... is a sign of the Institute's looking outwards to new and changing conditions in the world of commerce." It went on to explain in an article published in its magazine *Marketing*, "... the change of name is in keeping with a general change taking place nationally – that it is in keeping with an unmistakable change which is taking place in world conditions – and perhaps most important of all that it is in keeping with a change in management thinking throughout industry and commerce today."⁵

Let's be clear – this was not a case of the Institute turning its back on sales. At least that wasn't the intention. Its aim – possibly naïve in hindsight – was that just as sales had once incorporated

marketing, the ever widening discipline of marketing would now encompass sales. "The membership of the Institute is in fact engaged, at every level, in the performance of two related commercial functions, ie the planning of sales and the execution of sales plans, and these are two sides of the same bright medal. The members of this Institute are ALL engaged in marketing" the Institute announced in 1964.⁵

In reality, however, marketing developed an increasingly academic and complex worldview, incorporated into business degrees and the subject of countless textbooks, and as it did so, it continued to move further and further away from its sales-orientated origins. So while sales might be said to have remained true to its artisan roots, marketing became a 'quasi-science' that many would argue got carried away with itself. In 1973, Peter Drucker reflected a growing belief among marketers of the time when he said, "The aim of marketing is to make selling superfluous"⁶ – an ironic statement, given that the sales department has more influence than marketing itself on many so-called 'marketing' decisions'.⁷

By the 21st century, the two disciplines had frequently become completely fragmented, working in silos, often

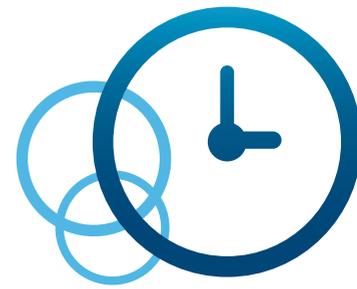
in conflict and usually competing for budgets. Marketing personnel were perceived by sales as ivory tower headquarters theorists, who were unaware of field realities.⁸ Marketing, meanwhile, saw sales as short-termist and narrow in their thinking.⁹ It had, in short, become a relationship lacking collaboration and harmony, with Dewsnap and Jobber famously describing it as "characterised by lack of cohesion, poor co-ordination, conflict, non-cooperation, distrust, dissatisfaction and mutual negative stereotyping".⁸

"marketing went off in its own direction"

"In many companies, sales forces and marketers feud like Capulets and Montagues – with disastrous results," says Kotler,¹ whose research found that some level of dysfunction usually exists, even in cases where the heads of Sales and Marketing are friendly. Perhaps most worrying of all is that so many companies seem to be indifferent. According to a report by CMO Council, just 40% of companies now have formal programmes, systems or processes in place to align and integrate the two functions.¹⁰

SECTION TWO

Time for change



This is The Chartered Institute of Marketing's centenary year. Whilst this may appear a superficial reason for addressing the growing divide between marketing and sales, it in fact provides a perfect opportunity.

Anniversaries are inevitably a time for reflection and if there is one overriding trend that has shaped our 100-year history, it is our growing separation from our brethren in sales. What better time to attempt to right this wrong and work towards a brighter future for UK PLC through reunification? The Institute has always recognised marketing as a constantly evolving discipline and this decision is testament to that.

Further rationale to act now comes as the online sphere increasingly shows up the divide between marketing and sales as artificial. As it becomes harder and harder to distinguish a sales activity from a marketing activity, companies that don't align the two functions as a unified team will miss out on valuable opportunities. Think about it: sales has always remained at the sharp end – close to customers and the market – whilst marketing has traditionally had a more strategic focus on the entire business. But online marketing regularly involves engaging directly with customers in a way that

would have historically been limited to the sales function, whilst with social media, the marketing team often carries out all the early stages of the sales cycle.

Even outside the online sphere, changes are taking place that are blurring the lines between marketing and sales. "In order to deliver superior customer value in the consumer goods sector, firms are forced to consider changes in the conventional distinction between marketing strategy formulation and sales implementation," say Dewsnap and Jobber.⁸ "Many traditional marketing responsibilities have shifted to the key account sales manager, and marketing is increasingly dependent on input from their colleagues in sales for the development of brand plans that will receive adoption by an increasingly demanding trade customer (Cespedes 1993). Furthermore, required levels of sales-marketing integration increase in line with the increase in value added demand by customers operating in the

type of concentrated trade channels found in the consumer goods sector."

Meanwhile, Nigel Piercy reports that the strategic importance of managing relationships with B2B customers has escalated dramatically in most markets. "The challenge to the sales organisation is to deliver effective strategy in a dramatically changed world of buyers," he says.⁶

A third reason for change is the growing recognition that even where the two functions may not conflict openly with one another, underlying clashes can still do strategic harm to business. "Many subtle differences between the two may work against forging stronger connections," reports Malshe.² "Lack of alignment over objectives or lack of clear role definition may cause subtle acrimony. Firms may also encounter challenges such as cultural mismatch between sales and marketing."

These cultural differences between sales and marketing often lead each function to not give due importance to the work performed by the other. Many times, sales people do not follow suggested marketing strategies or utilise marketing collateral, since they think that marketing is out

of touch with reality.¹¹ Equally, the marketing function can't perform adequately unless it is sufficiently connected with what is happening in the marketplace, say David Lyus *et al.*¹²

"marketing is already dead in the water"

Conversely, the few businesses that have successfully integrated the two functions reap the benefits – not least because an effective sales-marketing interface becomes an important determinant of how well the firm creates, delivers and communicates its value proposition.²

Fourthly and perhaps most significantly, marketing has no choice but to go back to its roots because it has reached an evolutionary cul-de-sac. "Marketing is already dead in the water in the majority of organisations," confirms Malcolm McDonald, professor at Cranfield School of Management and chairman of Brand Finance. One of the main reasons, he says, is that the 'division' of marketing and sales has led to the latter being increasingly perceived merely as a wasteful promotional

SECTION TWO Time for change

department, often spending very large sums of money with little or no financial justification. “Just think about it for a minute. Sales people will often sell the products they find easiest to sell to customers who treat them nicest (please forgive this slight exaggeration). This is a million miles removed from the classical role of marketing, which plans the product mix, the market mix and the customer mix. But with many sales directors being ‘barons’ in their own right, most organisations end up

with a situation where the tail (sales) wags the dog (marketing). Hence marketing gets driven inexorably down the promotions route. Indeed, in most organisations, marketing has been relegated to a promotional role precisely because of this separation.”

Professor John Saunders, at Aston University, agrees. Whilst researching the CIM’s White Paper on the Future of Marketing, he found the leader of the four Ps always winds up being ‘promotion’.¹³

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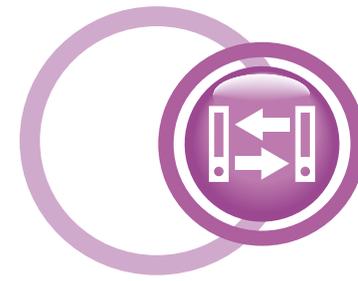
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SECTION THREE

Best for business



“The organisational separation of the two functions of marketing and sales is nonsensical in the extreme. It is a bit like separating market research, sales promotion and advertising from marketing,” says Professor McDonald.

It sounds obvious enough. But all too often marketing and sales are treated as separate entities, rather than two sides of the same coin, often with completely separate senior management and directorship (and even if there is a joint head, there tends to be a much stronger emphasis on either marketing or sales, depending on their own career history). The upshot of the inevitable tribal mentalities is damage to customer interests and the company as a whole. Integrating the functions as genuinely unified departments, on the other hand, puts the customer at the centre of operations and has been proven to lead to better performance and increased employee and customer satisfaction.²

“Product designers learned years ago that they’d save time and money if they consulted with their colleagues in manufacturing rather than just throwing new designs over the wall. The two functions realised it wasn’t enough just to coexist – not

when they could work together to create value for the company and for customers. You’d think that marketing and sales teams, whose work is also deeply interconnected, would have discovered something similar. As a rule, though, they’re separate functions within an organisation,” says Kotler,¹ who reports that he’s seen “only a few cases where the two functions are fully integrated”.

Even when they do work together, they are often set up so that they don’t always get along, he says. “When sales are disappointing, marketing blames the sales force for its poor execution of an otherwise brilliant rollout plan. The sales team, in turn, claims that marketing sets prices too high and uses too much of the budget, which instead should go toward hiring more salespeople or paying the sales reps higher commissions. More broadly, sales departments tend to believe that marketers are out of touch with what’s really going on with customers. Marketing believes the

sales force is myopic – too focused on individual customer experiences, insufficiently aware of the larger market, and blind to its future. In short, each group often undervalues the other’s contributions.”

No wonder this lack of alignment, which can only be resolved by a top-down integrated approach, ends up hurting corporate performance. “Time and time again, during research and consulting assignments, we’ve seen both groups stumble and the organisation suffer because they were out of sync,” says Kotler. “Conversely, 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.”

Research shows that this is exactly what happened when IBM integrated its sales and marketing groups to create a new function called Channel Enablement. When the functions operated independently of one another, marketers failed to link advertising money spent to actual sales made, so sales couldn’t see the value of marketing efforts and because the groups were so

disparate, marketing’s new product announcements often came at a time when sales felt they couldn’t capitalise on them.¹

“create value for the company and for customers”

In Rolls Royce, says Robert Nuttall, marketing and sales functions have never been separate. “They have always been distinct disciplines, but they have worked side by side within the same team. Our business is such that according to the task in hand, we form bespoke teams, but the point is they are always made up of both sales and marketing. Complexity is high in our projects because they are so large, but whilst some might say this is a good reason to keep things separate, we say it’s even more reason to keep them together. The result is good for business – in fact, I cannot imagine it functioning any other way.”

Everything from better information flows to accurate return on investment (ROI) and cost benefit accounting to strategic direction setting, reports Professor Alan Tapp, professor of

SECTION THREE **Best for business**

marketing at the University of the West of England. The alternative – that is, a fragmented marketing and sales team – makes customer relationship management harder, is an obstacle to retaining customers in a cross-channel world where the customer needs to be pulled rather than pushed, is harder to accurately measure ROI; and value-chain thinking harder to calculate.

“nicer and certainly more productive to work in a more collaborative atmosphere”

The impact on other departments is also significant, adds Holger Ernst, providing the example of NPD performance.¹⁴ “Because of their different departmental orientations, marketing and sales provide complementary information that is valuable for the NPD process. Marketing provides strategic marketing

information, while sales provides specific customer information. Combining this information is critical because it helps avoid niche solutions for an individual customer that, in turn, neglect the attractiveness of larger market segments or market trends or are not aligned with the firm’s overall product portfolio.”

Research, particularly from 2006 onwards, is packed with examples such as this showing success when marketing and sales are integrated and failure where it isn’t, confirms Beth Rogers, principal lecturer in sales management at the University of Portsmouth. “It all comes down to the fact that their shareholders benefit as a result of more profitable revenue growth. Their customers benefit because of better and more streamlined customer service experience and a better product or service offering. And their employees benefit because it’s nicer and certainly more productive to work in a more collaborative atmosphere than where there are struggles.”



SECTION FOUR

Success in practice



Integration does not just mean more talking. “There are companies that have tried to address this problem by endless meetings where the two teams co-operate and socialise, but that’s missing the point,” says Beth Rogers. “This isn’t just about exchanging information.”

Nor does the reunification of marketing and sales simply require practical measures. It’s not that these proposals, explored in depth in recent academic papers, notably integrating sales and marketing metrics, introducing job rotations, setting shared revenue targets and reward systems, are unimportant – far from it. But these measures cannot streamline business processes successfully in the long term without a whole new philosophy acting as a framework. The first step must therefore be the conceptual leap – the recognition that genuine integration can only come from a new mindset from the top levels of UK PLC.

This cultural shift will require analysis on a number of issues. “Marketing and sales have spoken a different language for too long,” says Nick Porter. “Marketing will go to sales asking why they haven’t actioned the

leads they gave them. Sales say they were rubbish. But when you peel the onion back, it turns out the word ‘lead’ alone means different things. Sales sees it as an opportunity – a nurtured contact ready to make a purchase; marketing sees it as a white paper. This disconnect is often entrenched between the two functions.”

“the first step must therefore be the conceptual leap”

Avinash Malshe agrees. “Before rolling out a strategy, even if the VPs agree upon definitions of a firm’s value proposition of what constitutes a lead, it is plausible that in the field, the lower-level executives will hold different notions compared to their superiors, or their sales counterparts about what value or a lead mean.”²

Then there is the fact that education and training programmes for marketing and sales have traditionally been poles apart. Not only is there no under graduate degree in sales, but there are few marketing degrees with whole modules devoted to sales. Meanwhile, few salespeople have spent time in marketing disciplines and *vice versa*. A unified model for anyone wanting to go into sales or marketing would enable marketers to be more aware of how the sales process works and what’s involved and sales people to be more aware of marketing functions and how they can deliver the results the company is looking for.

If sales and marketing are to be truly cohesive, thought could also be given to the possibility of shared budgets. Colin Hurst, Change Communication and Training EMA SAP Implementation at Merck, explains, “It makes far more sense to keep share of budget under one head. If sales and marketing can see the logic for why a selection of budget isn’t forthcoming, even if they don’t agree with it, it will help them see the same direction they are travelling in for the benefit of the company; rather than retiring to their respective covens and fostering discontent.”

Shared goals may be beneficial too, say some researchers who have found that employees who believe their goals are cooperative interact effectively and make progress on their tasks.² In the sales-marketing context, Kotler proposes that if revenue generation is made a joint responsibility for marketing and sales, it motivates them to integrate their thought worlds, market perspectives and organisational structures.¹

These are just a few examples of the kinds of areas requiring attention under the new mindset. But above and beyond the finer detail, there must be one overriding goal – for marketing and sales to cover a single process that exists on a continuum, says Kotler. The point of failure, he points out, is the handover between marketing and sales – which ultimately means that nut can be cracked by reunification.¹

SECTION FIVE

Conclusion

This is not an argument against specialism. Nobody is suggesting that marketing and sales should be merged into one discipline. But by integrating the two functions – as they once were – there is ample evidence that they would complement each other, rather than compete against each other.

“This isn’t about group think,” confirms Beth Rogers. “It is in business interests for marketing and sales to have their different points of view, but to work closely together. It is, after all, an artificial distinction.” Or to put it another way, same job, different angle.

“What marketing and sales have in common is responsibility for revenue generation and a responsibility for the interface with customers, which annual reports keeps telling us is the most important thing of all. With those two things in common, anything they don’t share is pretty unimportant,” concludes Rogers.

“the result will be a new, dynamic approach to business”

Many small businesses have got it right already. Such businesses already equate marketing with selling and the two functions’ work is closely aligned in order for the company to achieve maximum profit.¹ The two groups develop and implement shared metrics, for instance, and budgets are flexible and less contentious than in their larger counterparts. Large corporates, it seems, have much to learn from them.

It is time for marketing and sales to put aside our differences and realise there is more in our DNA that is the same than is different. The result will be a new, dynamic approach to business that we hope will shape the next 100 years of sales...and marketing.

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Using Customer Value to Integrate Sales and Marketing

Marketing and sales often seem disconnected, with marketing accused of lacking understanding of the customer's reality. This course uses concepts of customer value to integrate and align marketing and sales into a seamless unit focused on driving business growth. Delegates will learn how to apply the latest thinking on customer value to their marketing strategies, communications activities and lead generation campaigns.

2 day advanced level course
Next course date:
26-27 January 2012 (Moor Hall)
www.cim.co.uk/0436

Courses combine to show how marketing and sales can work together in practice...

CIM take a unique approach to two of their strategic level courses Strategic Marketing Masterclass and Strategic Sales Planning Masterclass. These courses are scheduled to run at the same time so that delegates from both courses can join together and take part in specific exercises designed to explore the complex relationship between marketing and sales.

Two joint exercises have been developed to look at the issues and challenges between marketing and sales and see how barriers can be broken down. Discussions include:

- What are the underlying causes of tension between marketing and sales and what practical steps can be taken to resolve them?
- What processes, protocols and recommendations could you make to align the strategic marketing and sales plans?
- How to identify key decisions or areas of control that need to be made by marketing and sales. Which is clearly a sales decision, which a marketing one? See areas of overlap and try and work out who should take the lead.
- How to design a truly integrated marketing and sales function for a large organisation.

The overall objective is to show how marketing and sales should be aligned and integrated and how this can benefit the organisation. For further details on either of these courses, please see details opposite.

Strategic Marketing Masterclass

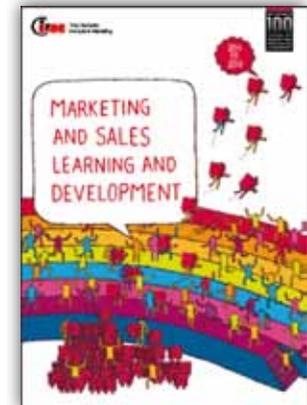
This masterclass shows you how to structure and write strategic and operational marketing plans that are customer focused and externally orientated. It provides an opportunity to review your current approaches and identify new areas of competitive advantage.

5 day programme (split 3 days + 2 days)
Next date:
14-17 February and 26-27 March 2012,
15-18 May and 25-26 June 2012
www.cim.co.uk/0174

Strategic Sales Planning Masterclass

This masterclass provides delegates with the knowledge, tools and techniques to contribute to the sales section of the business plan and manage the preparation of operational sales plans. Delegates will benefit from learning new ideas about sales planning and how to maximise ROI through a customer orientated approach to decisions.

5 day programme (split 3 days + 2 days)
Next date:
14-17 February and 26-27 March 2012,
15-18 May and 25-26 June 2012
www.cim.co.uk/0177



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