



EBOOK

The Comprehensive Guide to B2B Healthcare Marketing/Sales Alignment

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Why Cross-Functional Collaboration is Key to Healthcare Marketing Success

In any industry, sales and marketing teams need to be closely aligned to achieve both departmental and organizational goals. This is especially true in the healthcare industry where tight margins, high leadership turnover, and market disruption have led to a more challenging, more competitive environment than ever.

Without cross-functional collaboration between marketing and sales departments, marketing efforts will fall flat, sales calls won't be as fruitful, and departmental goals will drift further away from key strategic organizational objectives.

But something magical happens when sales and marketing are on the same page. Ok, so it's not magical. It's really strong, supportive teamwork that fosters better results for your business, internal culture, and your customers.

When marketing and sales are on the same page, each team's efforts are elevated and more impactful. And marketing teams play a pivotal role in creating this alignment — proving their value as a strategic partner and a direct influencer in sales revenue.



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Misalignment Leads to Missed Opportunities

Misalignment leads to frustration — both internally and externally. When sales and marketing don't align on the areas listed above and support each other, the impact is felt across the entire customer pipeline.

A lack of alignment often manifests as disconnected messaging that's confusing for prospects. — and that means your audience won't understand why they need you. Without a strong, consistent message about the value and necessity of your products or services, marketing and sales aren't rowing in the same direction. This has at least a couple of negative outcomes:

- **Prospects fixate on price because that's now the most important factor to them.**
- **The entire sales call is spent educating prospects, leaving no time for the salesperson to uncover opportunities and add value.**

Ultimately, these extremes start to affect collaboration between teams. Leaders may feel at odds with one another. Instead of working together towards a goal, it can feel like working toward a goal in spite of your colleagues.



Common Challenges to Achieving Marketing and Sales Alignment

Achieving alignment between sales and marketing teams seems simple. Marketing differentiates, promotes, advertises, and generates leads. Then the sales team takes those leads and turns them into customers.

Unfortunately, it's not that straightforward. The obstacles sales and marketing departments face in strategic alignment aren't due to some easily solvable rivalry or disagreement. Many teams that seem to work well together just don't realize they have some fundamental disconnects that result in underperformance. Whether it's a known challenge or not, the most common barriers are often due to structure and communication.

As a marketing leader, here are some of the most common challenges you'll need to address in order to reach true alignment between your team and sales.

Team Structure

As separate departments, it's extremely common for marketing and sales teams within the B2B healthcare industry to have different team roles and reporting structures. This inevitably leads to silos. Think about this chain of command: a marketing manager responsible for digital ads reports to a digital marketing director, who reports to the VP of marketing. That VP of marketing might be the closest link between the marketing and sales teams.

The digital advertising manager is far removed from the sales team, through no fault of their own. But the sales team could very likely help inform digital strategy by passing key insights from customer conversations. Maybe the messaging is great for awareness, but customers have so many questions on

sales calls, that they run out of time before getting to product or contract specifics. What if sales and marketing were better aligned and able to collaborate on how to answer these questions earlier to meet audience needs?

Organizational Objectives and Leadership

Sales and marketing leaders have two different views of day-to-day activities. They are also likely responsible for separate organizational goals and strategic initiatives. These separate objectives don't necessarily torpedo alignment, but they can when they are only connected at the VP or executive level.

For truly effective B2B healthcare marketing efforts, leadership needs to be sure their teams are connected at every level. Marketing and sales work together

strategically and operationally to support internal and external organizational functions. Like a ladder, sales and marketing should be boosting each other at each step, not climbing alone to meet at the top.

Goals

Marketing teams and sales teams have different goals. Marketing focuses on differentiating and sales is about delivering value. It follows that each department will have its own goals and KPIs. Alignment can easily slip through the cracks here when the goals and measurements don't keep each other in mind.

For instance, marketing might generate an overflowing pipeline of leads, but the sales team might deem the majority of them unqualified. While marketing appears to be overachieving, there's a disconnect that ultimately sees those "great metrics" lead to underwhelming results.

Commercial Integration Maturity Model for Marketing

Marketing Activities That Contribute to Progressive Maturity

	Strategic Alignment	Operational Alignment	Strategic Integration	Operational Integration
 Audience Understanding	Marketing prioritizes market segments in collaboration with Sales.	Marketing works with Sales to profile target buyers and accounts.	Marketing and Sales prioritize accounts based on psychographics.	Marketing and Sales dynamically segment and prioritize accounts.
 Messaging	Marketing creates messaging and content and shares it with Sales.	Marketing uses Sales input to create or refine messaging and content.	Marketing and Sales co-create integrated multichannel engagement.	Marketing and Sales co-create a messaging and content strategy.
 Measurement	Marketing measures quantity of leads generated for Sales.	Marketing measures quality and quantity of leads generated for Sales.	Marketing and Sales track and credit activities throughout the funnel.	Marketing and Sales track revenue through shared KPIs.
 Revenue Enablement	Marketing creates and manages resources for sellers.	Marketing coordinates with the sales enablement function.	Marketing and Sales provide joint enablement of the buying journey.	A unified enablement function spans customer-facing roles for end-to-end revenue production.
 Process Design	Marketing prioritizes and qualifies leads using lead scoring methodologies.	Marketing collaborates with Sales to refine lead scoring and qualification criteria.	Marketing and Sales ensure harmonized multichannel buyer interactions.	Marketing and Sales co-create a strategy to dynamically guide customer behaviors.
 Customer Data and Systems	Marketing maintains its own customer data and systems.	Marketing formalizes data collection processes with Sales and conducts ad hoc integration.	Marketing and Sales use revenue intelligence to jointly plan programs.	A formalized process prioritizes data governance and future technology investments.

Source: Gartner analysis
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This commercial integration model from Gartner demonstrates how marketing and sales can work together strategically and operationally throughout the customer journey.

Internal Benefits of Alignment

Once you address these obstacles and create a plan to better align your sales and marketing teams, you'll start to realize the benefits to your entire organization — not to mention your prospects. It's true that creating alignment doesn't happen overnight, but when you put in the effort to achieve it, you can create impactful campaigns that serve your internal and external audiences. What does that look like in practice? Consider these benefits alignment brings.

Consistent and Resonant Messaging

Everything works better when marketing and sales are aligned. To start, the flow of information between departments leads to a more cohesive messaging strategy. This gives your brand a huge head start on differentiating in a crowded, competitive industry.

The stakes are high in healthcare, and brand recognition and differentiation are key to successful business-to-business

campaigns. For example, when marketing has access to customer data from sales calls, it can better inform your messaging. This ensures you can consistently craft messages that will be memorable and persuasive to the audiences you want to reach.

More Right-Fit Inbound Leads

When you have on-target, precise messaging that resonates with your target market, you'll be more equipped to attract your ideal prospects. The quality of leads is just as important as the quantity — and strong marketing-sales alignment means your streamlined efforts will likely capture better prospects at a higher rate than disconnected efforts from each department individually.

Customers Who are Ready to Buy

When there's internal alignment, that continuity flows through to the customer's experience. After you've handed your

marketing-qualified leads to your sales team, it's time for them to make their pitch. A strong alignment between marketing and sales will result in a prospect that understands the value and is ready to take the next step.

Messaging that focuses on benefits and centers on the audience can educate potential buyers so that when it's time to sell, the customer is already primed for the conversation.

Customer Benefits of Alignment

Internal alignment between marketing and sales makes the customer journey easier. Marketers are in a position to build better relationships that lead to better customer experiences. Consider how internal continuity, or a lack thereof, impacts the external customers you work with.

You Build More Trust with Customers

Whether it's a small contract or a massive services agreement, it's important to build trust with customers — especially when the stakes are high and the margins are thin, like in the healthcare industry. Marketing messages and sales interactions that share consistent messages build this level of trust in your audience, prospects, and customers.

Sales Become More Efficient

There are multiple ways B2B sales happen in the healthcare industry.

Healthcare products and services are typically not sold directly to the end user. The more complex the sales process is, the more important it is for marketing and sales departments to work closely.

And when marketing and sales teams are on the same page, it increases the efficiency of both departments. Alignment means both teams are focused on the activities that drive customers toward the ultimate goal: a sale.

Third Parties are Supported to Make Sales

Finally, with a distribution or dealer partner involved, the sales process becomes multi-faceted. Third-party channel partners usually have different requirements when it comes to marketing and support materials.

When the marketing department is aligned with the sales goals for these channel partners, additional campaigns, sales enablement materials, and product information sheets can be created specifically for dealers and distributors. Point-of-purchase materials, training programs, and marketing materials all go a long way to help them sell through to the end customer.

How to Create and Maintain Alignment

The challenges are clear, and so are the benefits. The next step is to make your plan and gain support for alignment across the marketing and sales teams. Approaching marketing planning through a cross-functional lens can elevate your internal standing and showcase your team as a valuable strategic partner.

1. Start With an Open Mind

Marketing and sales are functionally linked. As a result, both teams need to feel a sense of responsibility for each other's success.

Marketing and sales teams: in most organizations, the two departments see themselves as drivers behind the strategy and outcomes, with the other as a passenger, supporting the outcomes. The problem? Neither wants to be relegated to the role of passenger.

In reality, it's like each team is in their own car, carrying half the load, with plans to meet at a designated location. But if one team gets off track or loses a piece of luggage, both teams will wind up frustrated at the final destination, or worse yet, end up in different places.

As a marketing leader, you have the ability to break teams out of the traditional siloed approach and communicate with both about how and why they need to be open-minded.

2. Develop an Internal Framework for Collaboration

Marketing and sales teams can think of each other as internal clients and recognize that they have shared goals. For example, sales teams need to understand that marketing helps drive revenue and there are areas where it's beneficial to rely on marketing to support sales processes.

From a marketing perspective, you know your department drives revenue through:

- **Differentiation**
- **Corporate and product branding**
- **Product positioning**
- **Building awareness and educating customers**
- **Driving inbound demand and generating leads**
- **Providing sales enablement and support**

Remember, sales teams aren't always privy to these activities and results. They may only see the leads and sales enablement materials.

To help marketing and sales teams understand how their goals and responsibilities intersect, have each team independently rank the relative importance of all marketing and sales functions, and

then compare. This provides an opportunity to reach a shared agreement on priorities that can help galvanize collaboration.

TIP: Keep lines of communication open between marketing and sales teams by having regular check-ins and deciding on shared goals that both teams own together.

3. Identify Stakeholders

Once your teams have reached a consensus on internal priorities, it's time to broaden the scope of what marketing-sales alignment means for your business goals. The best way to do this is by identifying each person or group that is impacted by your marketing and sales activities. Once you've created a list of the stakeholders, you can create a map, or network, of how they are related and connected through your marketing campaigns, internal communications, and external campaigns.

4. Map the Buyer Journey and Consider Every Critical Touchpoint

After mapping all key stakeholders, you can drill down and focus on the buyer journey. We recommend identifying all the possible marketing or sales touchpoints. Each interaction has the potential to influence a purchase, so don't consider them in a vacuum. In the same way you identified and connected stakeholders, it's important to identify and connect the touchpoints to see how buyers experience your business from one end of their journey to the other.

TIP: Stakeholder identification and journey mapping should involve both sales and marketing teams, so both teams feel a sense of ownership over the entire customer journey.

5. Implement a Process

Last, use the insights and determinations you've made in the previous steps to implement processes that create and

maintain alignment. Activities like regular meetings, holding joint customer calls/ meetings and creating channels for constructive feedback all help keep teams closely linked and driving in the same direction.

It's also important for your marketing department to position itself as an expert and leader in creating and prioritizing resources that help the whole organization. Implementing processes or frameworks of communication between departments, particularly where work requests are concerned, can help develop and maintain alignment.

To aid your marketing team, distribute a strategic request form to other departments. This will help them think through their request in a way that aligns with overall business objectives while also empowering your marketing team to deliver the most impactful asset or strategy, rather than being order takers for requests like, "we need a brochure."

Strategic Request Form

On the following page is an example of a strategic request input form we've developed to help our clients work through requests for marketing support. It's designed to dig into the "what, who, where, when, why, and how" to increase visibility into strategic initiatives between departments. In addition, this form helps marketing teams prioritize the requests they constantly field, and position themselves as a strategic partner rather than a bank fielding withdrawal requests.

This form gives marketing teams more input on projects, a higher-level strategic view across the organization, and the ability to understand and analyze how each request is linked to marketing and sales activities.



1. Describe the opportunity/idea in two sentences or fewer.

2. Who are the target audiences we are trying to reach? What do they currently think/feel/do? What do we want them to think/feel/do?

3. How does this request align with our current growth initiatives? What is the overall impact on the business?

4. What is the time frame including any milestone dates or deadlines?

5. Please include the location of any physical events and/or communication channels (e.g., trade shows, customer meetings, publications, websites, etc.)

6. What resources are required to support this (money, time, people, and otherwise)?

7. On a scale of 1 (nice to do) to 5 (must do), how would you rank this? Are there other initiatives that we should stop in order to do this?

8. How will we measure the success of this initiative?

Better Alignment Creates Better Business Outcomes

Marketing departments in healthcare product and service organizations are in a position to revitalize the relationship with sales.

When these departments are aligned, the entire organization benefits. Alignment increases efficiency by creating a flow and structure of teamwork that helps both departments achieve their goals. It creates a more effective sales process for prospects that encourages and influences more purchases.

Ultimately, by creating alignment, marketing leaders have the ability to shape the future of their organizations, by working through complexities between departments, fostering collaboration, and emerging as a strong, united team, laser-focused on one singular goal: driving profitable sales.

Core can help drive internal and external brand alignment to solve the biggest challenges healthcare marketers face, making sure you shine in the process.

[Reach out for more information.](#) We'd love to talk!



Alignment creates a more effective sales process for prospects that encourages and influences more purchases.





Helping people live healthier, more engaged lives.

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