

# Fuel Growth Through Customer-Centered Alignment

A Handbook For B2B Marketing Leaders



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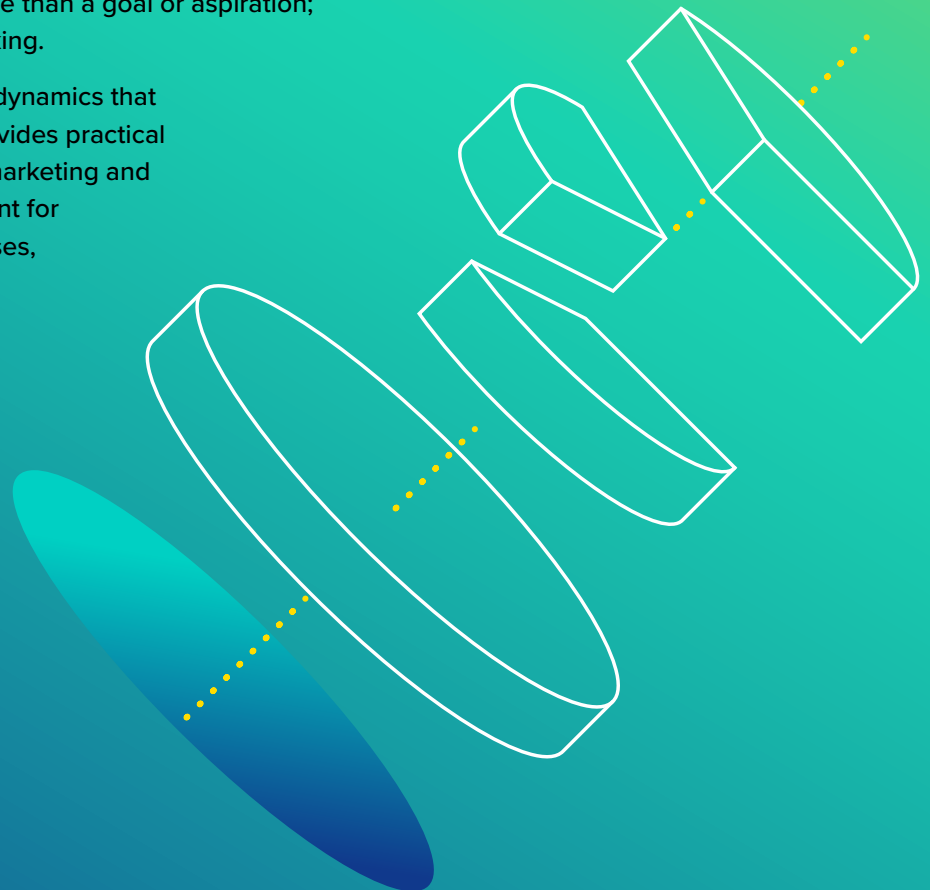
# Alignment Must Be More Than Aspirational

B2B marketing leaders recognize the importance of cross-functional alignment. Improving alignment with sales, product, and other functions has consistently ranked among marketing leaders' top objectives, Forrester's survey data shows. Yet, alignment remains elusive: In the same surveys, marketing leaders have also consistently called lack of alignment a top challenge to achieving marketing goals.

Why is achieving alignment so difficult? For one, many of the ways in which marketing and other teams are evaluated and incentivized are still individual — for example, marketing organizations on marketing-qualified leads; sales on new business closed. Even when some degree of alignment is achieved, it isn't always meaningful. Leaders and teams often think of alignment in terms of internal processes or goals, rather than of those of buyers and customers.

As business buying grows more complex and buyers become ever more empowered and self-directed, marketing, sales, and other customer-facing teams need to work together to deliver experiences that win and retain customers and drive consistent growth. Alignment must be more than a goal or aspiration; it needs to be cemented into ways of working.

This e-book explores the complex buying dynamics that necessitate meaningful alignment and provides practical guidance to build alignment, both within marketing and across B2B functions. It provides a blueprint for driving growth by aligning people, processes, and objectives to the buyer journey and customer lifecycle.



# Rethinking Alignment In A Complex Buying Landscape

B2B buyers' expectations of providers and the buying process have perhaps never been higher. Eighty-three percent of buyers in a recent Forrester survey said they were dissatisfied with the *winning* provider in one or more areas. Silos between marketing, sales, and other customer-facing functions contribute to these pain points — disconnected systems and technology, lack of information-sharing, and tactics executed in isolation from one another can lead to a disjointed experience.

Given the seismic shifts in B2B buying behavior in recent years, longstanding processes and approaches for engaging and winning buyers may no longer help teams make headway. The poor track record of typical marketing and sales approaches underscores this: The conversion ratio from initial engagement to closed/won deal is less than 1% for most B2B marketing and sales organizations, Forrester benchmark metrics data shows.

Understanding the key behavioral shifts is the first step to forging meaningful cross-functional alignment. B2B marketers and their sales and product peers must recognize that:

- **Buyers are increasingly self-directed.** Self-guided interactions now comprise just over half of total types of B2B buying interactions, Forrester's survey data shows. Many buyers prefer to seek information on their own and to engage with a provider only once they are ready. In addition, buyers are increasingly guarded with their contact information, making it hard to know when they're exploring your offerings.
- **Buying scenarios are complex.** The average buying cycle involves three considered vendors, four separate departments, and eight buying group members, four of whom are outside the buyer's company. Marketers and sellers need to work together to understand the connections between buying group members and the role that each plays, along with the larger dynamics driving purchasing decisions.
- **More buyers are stalling or extending their purchasing processes.** B2B marketing decision-makers Forrester has surveyed in recent years indicate that buyers and customers are taking longer to commit to a purchase than they have in the past. In addition, the sequence of steps that buyers follow before they purchase varies and is rarely linear — meaning that their planned stream of tactics will rarely line up neatly with buyers' processes.

The fact that buyers are more empowered and self-directed now than ever before means that the only process that truly matters is the buyer's process. Marketing, sales, and product functions need to align around that process. Given their deep customer understanding, marketing leaders and teams play a critical role in driving alignment around buyer value and building and fueling sustainable [growth that is rooted in customer obsession](#).

# 83%

of B2B buyers  
have expressed  
dissatisfaction with the  
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the purchasing process.

# The Tenets Of Effective Cross-Functional Alignment

Teams that commit to buyer- and customer-centered alignment may not know where to begin or how the end state should look. While this will differ between companies, good intentions may amount to little without a solid action plan. Forrester has spoken with leaders across B2B marketing, sales, and product and identified areas that can have a significant impact. As you work across functions to build and strengthen alignment, consider beginning with these areas and actions.

## Pinpoint Data On What Buyers And Customers Value

Most companies have tons of data but either fail to gather data on what buyers and customers value and how they realize it, or have this data in pockets with select teams. Product teams, for instance, frequently conduct user-needs interviews, but these insights may be inaccessible to marketing. Sellers, meanwhile, may only have visibility into a fraction of interaction types that buyers find meaningful due to the lack of a systematic approach to sharing that information.

Bring together functional leaders to understand what data currently exists in silos and ensure that there are mechanisms for sharing it among teams. If your organization lacks insight into what buyers value or how customers realize value from your products, start gathering it through surveys, conversations with customers, or other mechanisms. Ensuring that there are processes for disseminating and incorporating buyer and customer feedback helps marketers craft more effective messaging, sellers have more productive interactions, and product teams enhance the value of company offerings.


## Rethink Metrics


At many organizations, metrics tend to be internally focused (e.g., marketing-sourced leads, click-through rates, conversion rates). Internal, siloed ways of measuring success can hinder alignment and obscure or even diminish business outcomes: For example, an increase in marketing-qualified


### THE FOUR DIMENSIONS OF VALUE


B2B firms that create genuine value for buyers and customers grow faster than other companies. Forrester's survey data shows that decision-makers at B2B firms with high revenue growth are 2.5 times more likely than their peers at companies with no revenue growth to say that their employees have the resources needed to contribute to customer value creation.

To drive alignment that's truly meaningful, it's critical to understand how buyers and customers derive a sense of value. Forrester's research has shown these dimensions to be key:

 **Economic value.** B2B buyers want to be sure that a solution they're considering justifies the time and effort that they're investing in the purchasing process. Providers create economic value by enabling buyers to find the information they're looking for quickly. Marketers contribute by equipping sales with insights and relevant resources.

 **Functional value.** Buyers want to ensure that the solution they choose will in fact solve for their needs. B2B providers create functional value by understanding buyer needs and infusing this understanding in their solutions and interactions with buyers. Post-purchase, you must ensure that customers continue realizing value from doing business with you.

 **Experiential value.** When buyers feel supported and respected in every interaction of their journey, providers have created experiential value. Providing clear, simple steps toward a purchase also contributes to experiential value.

 **Symbolic value.** Buyers derive symbolic value when they feel that their association with a company confers status on them or their work. Learning opportunities that offer progressively higher levels of mastery, for instance, offer symbolic value. Customer communities also offer symbolic value through a sense of belonging.

leads may be seen as a success for marketing but not necessarily reflect the amount of business that has actually closed.

Work with your peers across functions to understand how well the metrics used to gauge marketing results reflect success holistically. Explore introducing shared metrics that are buyer- and customer value-focused. For example, a “speed of information” metric could gauge how efficiently prospective buyers find the information they’re seeking on your website. Post-purchase, you might consider a metric based on the percentage of customers who have achieved specific milestones with a product or service.

## Rightsize Revenue Technology

Nearly 40% of B2B marketing leaders spend more than 15% of their budget on technology, Forrester survey data shows. Some of that technology may overlap with other tech tools in the revenue ecosystem — for example, you may have multiple CRM systems or duplicative marketing automation platforms. Break the cycle by looking for efficiencies. Along with reducing redundancies and costs, streamlining and consolidating can improve internal process agility and make for a smoother customer experience.

~40%

of B2B marketing  
leaders spend more  
than 15% of their  
budget on technology.

## Invest In Revenue Operations Capabilities

Implementing a [revenue operations function](#) is the most direct way to close persistent alignment gaps in B2B organizations. Revenue operations leaders and teams unify data, processes, technology, and talent to better serve the customer lifecycle and drive growth. Revenue operations is not an organizational construct but rather, a strategy designed to maximize customer value and, with it, company performance. By breaking down silos of data and insights across the business, revenue operations enables companies to form a shared view of the customer and ensure consistency in all customer acquisition, growth, and retention interactions.

## Cultivate A Collective Customer-First Mindset

Many B2B organizations — even those that consider themselves to be customer-focused — still orient their goals and strategies in their products. Meaningful, growth-building alignment needs to be rooted in buyer and customer centricity. Marketing leaders are in a prime position to [foster a culture of customer obsession](#), both within their teams and throughout the organization.

Encourage your team to take a customer lens to their public-facing materials and buyer and customer outreach. (For example, try filling out a form to download an asset or entering yourself into your prospecting nurture stream.) At the company level, work to cultivate a customer-first mindset by encouraging company leadership to audit their board minutes, earnings calls, and mission statements to honestly assess how well they create value for customers. If an activity or program doesn’t show up on executive reports or dashboards, no amount of process lower in the organization will have meaningful impact.

As you embark on this journey, consider the role that change management will play. Top-performing firms actively dedicate time and resources to change management — they think through employee hiring and training, the language they use internally, and the stories they celebrate to reflect customer value and drive the change that they wish to effect. Marketing leaders play a pivotal role in setting the tone for companywide customer-centered change.

# Uplevel Marketing-Sales Alignment

For marketers, perhaps the most critical cross-functional relationship is with sales. Given the handoffs from marketing to sales, tight alignment is key to a smooth, cohesive experience. A lack of alignment often results in disjointed communications, duplicative efforts, blame- or credit-seeking behavior, and missed opportunities.

These three actions give marketing leaders and teams a solid starting point for more closely aligning people, processes, and technology with sales.

## 1. Map The Buyer's Expected Workflow And Information Needs

Review what buyers typically need to complete their journeys. Start with existing journey maps — for example, those created by portfolio marketing or customer experience teams. These maps should include the steps involving interactions between a buyer and your organization as well as those that the buyer takes independently. Supplement these with insights into asset downloads, sales conversations, and other touchpoints to understand what content and messaging resonates. Because B2B purchases are often high stakes — and buyers seek out so much information on their own — provide self-service resources such as white papers, product information, case studies, and product trials to help buyers understand your offering and validate their decision-making.

## 2. Shift From A Leads Focus To An Opportunities Mindset

To be effective, go-to-market teams must move from treating buyers as individual leads toward viewing them in the manner they actually buy: in groups, with participants in different departments (or even outside of the company). Forrester's [B2B Revenue Waterfall™](#) provides a common framework for teams to link buying group members with one another, rather than treating them as isolated leads or, worse, duplicate leads. It enables marketing and sales teams to engage buying group members more effectively and track opportunities as they progress along the path to purchase. Using the waterfall framework also helps teams more effectively capture retention, cross-sell, and upsell opportunities.

## 3. Implement A Cross-Functional Technology Strategy

Advancing opportunities and providing a smooth experience for buyers and customers requires marketing and sales teams to pool insights collected across their various technology tools to gain a holistic view. (Insights from customer success teams play an important role here, as well, in capturing cross-sell and upsell opportunities.) Catalog the insights to which you have access and analyze them to deliver more meaningful interactions. For example, if a customer has achieved great success with one of your products, you might accelerate cross-sell conversations for another related product. Conversely, if a customer has expressed dissatisfaction, you might hold off on a retention conversation until the issue is resolved.

Some of the benefits of taking these steps — namely, reduced friction and improved efficiency — may manifest quickly. More importantly, tighter alignment will improve buyers' experience with your company and pave the way for stronger revenue growth.

# Strengthen Alignment Within Marketing

To best support alignment with other functions, marketing organizations need to align within. This is especially critical of frontline marketing teams (i.e., demand, account-based, and customer marketing) whose work has the most direct impact on buyer and customer experience.

Coordinating across siloed marketing teams continues to be a top challenge for B2B marketing leaders in implementing programs and campaigns, Forrester's survey data shows. Just as disconnected insights, metrics, and processes between revenue-generating teams can diminish buyer and customer experience, disconnects within marketing can have a similar detrimental result.

Adopting a customer lifecycle-oriented approach — which Forrester calls [lifecycle revenue marketing](#) — can help break through silos and capture a full range of revenue opportunities, not only new acquisition but also retention, cross-sell, and upsell. The key shifts involved in this approach include:

- **Thinking beyond channels or functions.** Buyers and customers don't think in terms of channels or functions as they're moving toward a purchase or once they've become a customer. Marketing teams must shift their approach to align more closely with the often idiosyncratic processes that buyers and customers follow. That requires marketers across subfunctions to pool persona profiles, data, and insights from across the buyer journey and post-sale lifecycle and map their content and approaches to buyers' and customers' approaches.
- **Treating buyers as partners.** Buyers rely on all kinds of partnerships to make better decisions, but the provider partnership is particularly important. Buyers will often look to providers they have worked with previously when they are investigating a solution. Adopting a partnership mindset helps marketers align their actions to buyers and customers, rather than to internal processes.
- **Marrying persona profiles with data and insights.** The detailed buyer persona profiles that portfolio marketing teams develop and the intent data and engagement insights picked up by frontline marketing teams (for example, video views or white paper downloads) often are disconnected from one another. Bringing these together enables marketers to develop better-personalized, more compelling experiences. For example, a company targeting financial services buyers could use intent data to home in on which buyers are in market for its solution and firmographic data to understand in which cities prospects are located and then create more tailored messaging.
- **Considering the full range of opportunities.** Forrester's survey data shows that existing customers account for more than three-quarters of annual revenue for B2B organizations. A lifecycle approach encompasses the full range of opportunities and buying motions, rather than prioritizing new logos. Along with acting on signals from buyers leading up to a purchase, marketers solicit and use customer survey data and other customer experience insights to champion customer needs long-term.



of annual revenue for  
B2B organizations comes  
from existing customers.



- **Setting shared goals and complementary KPIs.** Replacing divergent goals and KPIs with ones that align teams' efforts across the lifecycle reduces friction and competition for resources. For example, an organization creating a cross-sell goal should ensure that demand and customer marketing are aligned on ownership, strategy, and execution. Otherwise, the teams might work in parallel, without coordination on resources or content, program, and measurement activities.

A lifecycle approach instills an alignment mindset that sets a strong foundation for aligning across functions. It also improves efficiency within marketing and enables marketers to run more adaptive, responsive programs with greater resonance to buyers and customers.

## Start Your Alignment Journey

Recognize that building cross-functional alignment takes a long-term commitment and requires patience and flexibility. Start by focusing on marketing — understand where silos currently exist between teams and build a plan to share buyer and customer insights and develop better-integrated ways of working. Be sure that you, as a wider organization, have mechanisms for gathering and sharing customer feedback, along with using it to guide product innovations, messaging, and ways of interacting with customers and buyers.

For more in-depth, personalized guidance on building alignment within your company, [reach out to us](#).

## Additional Resources

### More Alignment Resources

Explore these complementary reports and other resources to help you strengthen alignment within marketing and across functions.

- [The B2B Customer-Obsessed Growth Engine](#) (complementary report): Tap the strengths of marketing, sales, and product and align around customer value to drive sustainable growth.
- [Lifecycle Revenue Marketing Is The Future Of Frontline Growth For B2B Organizations](#) (complementary report): Learn more about lifecycle revenue marketing and how it lays the foundation for adaptive, customer-oriented marketing that drives revenue.
- [Raising The Bar For Marketing-Sales Alignment](#) (on-demand webinar): Gain insights and tactical advice for integrating people, processes, technology, and insights to drive efficiencies and improve results.
- [Driving Revenue Growth: Reach Next-Level Revenue Engine Performance](#) (e-book): Discover Forrester's B2B Revenue Waterfall and how marketing and sales teams can work together to track, win, and retain opportunities with buying groups.
- [Forrester B2B Client Success Stories](#): Learn how working with Forrester has helped marketing and sales leaders improve alignment and become more customer-obsessed.

## Lead Customer-Obsessed Growth

As B2B buying dynamics continue to evolve, marketing leaders have a unique opportunity to unite the business around customer obsession and set a vision for achieving sustained growth. Forrester partners with marketing leaders on every step of this journey. Our Forrester Decisions services bring together research, tools, frameworks, and hands-on guidance to help you shorten the distance between bold vision and superior impact.

Our Forrester Decisions services for B2B marketing leaders include:

[Forrester Decisions for B2B Marketing Executives](#) →

[Forrester Decisions for Portfolio Marketing](#) →

[Forrester Decisions for Demand & ABM](#) →

[Forrester Decisions for Partner Ecosystem Marketing](#) →

[Forrester Decisions for Revenue Operations](#) →

Additional Forrester Decisions services are designed to help leaders in B2B sales, product, technology, and other functional areas set a vision for customer obsession and accelerate growth. [Learn about all of our Forrester Decisions services.](#)

WANT TO START A CONVERSATION?

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