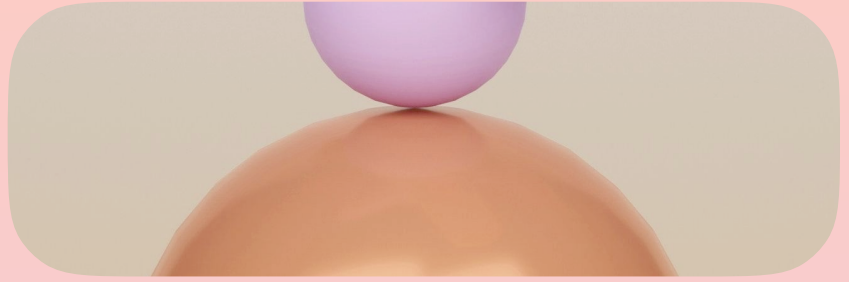


Sales



and

marketing

(mis)

alignment

Putting the customer back
in the customer journey

It's a cliché at this point.

Sales blames
marketing for
“bad leads.”

Marketing blames
sales for fumbling
a “good lead” and
losing the deal.

Maybe you've heard about the sales and marketing blame game—maybe you've experienced it.

But what if the culprit wasn't each other, but fragmented data and a mutual misunderstanding of the customer journey?

Each piece (of data) matters.

Despite customers sharing data with you at every step of their journey, you still don't know who they are or what their experiences are.

The issue isn't a lack of data. It's actually disconnected data held in the hands of other stakeholders on your go-to-market (GTM) team.

✗ Your data lives in silos

✗ Your teams are out of step

✗ And your data management systems are incompatible

You need a complete picture of your customer, and to put them back where they should be—in a personalized customer journey. This is the path to an aligned GTM function. **Why?**

Because, really, customers don't care if your teams are at odds.

They expect a seamless experience... which you can only create if you align your teams and build trust. To build that trust, you'll have to uncover inefficiencies, remove silos in your organization's structure, and then improve the customer journey.



So, why is there so much tension between your marketing and sales teams?

Well, they just don't see eye to eye.

When asked to reflect on their own knowledge of the journey...

ONLY

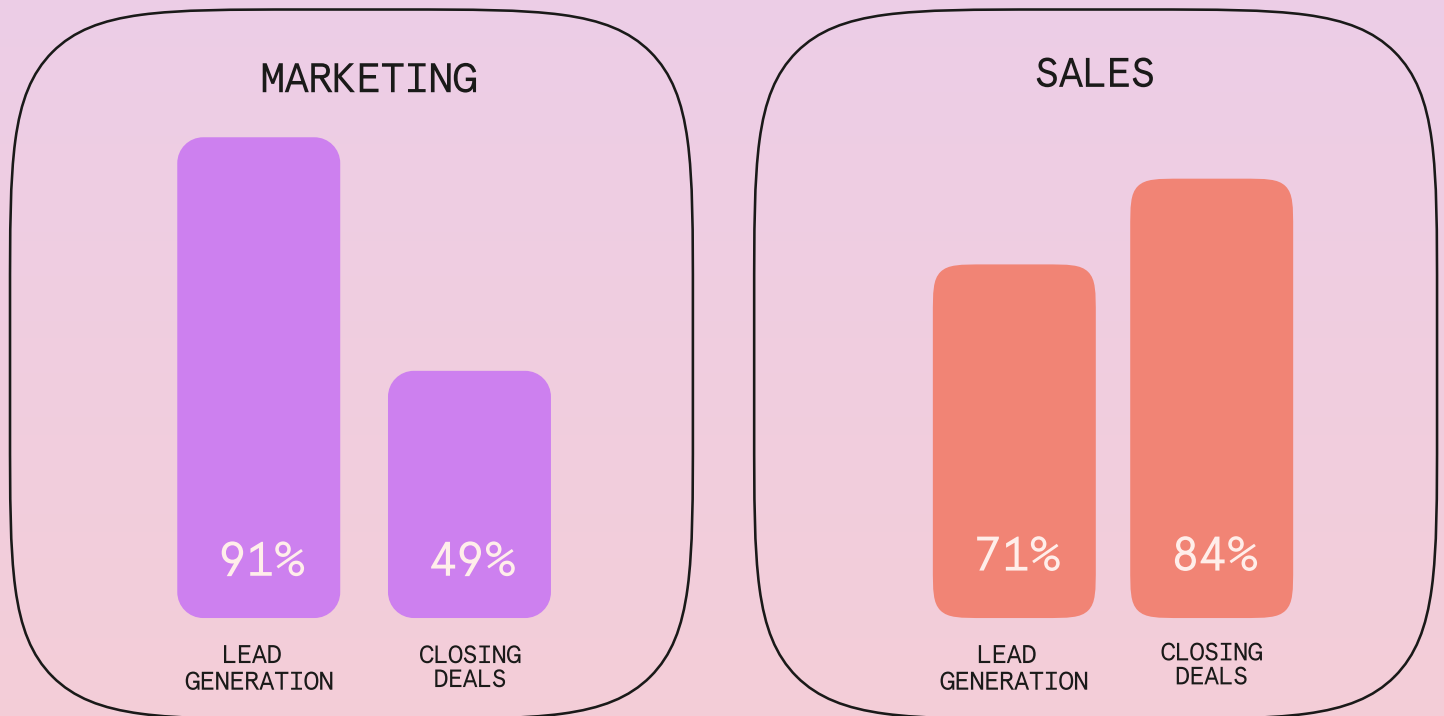
20%

of professionals at companies with 100+ employees said they have a **very good** understanding of the responsibilities of other teams.

55%

of employees in workplaces with fewer than 100 employees felt they had a **good** understanding of other teams' responsibilities.

The most important part of the pipeline? Depends on who you ask.



Marketing says generating leads is the most critical.

For sales it's closing deals. When teams don't understand each other, they overstate the importance of their own roles.

Teams aren't aligned

and data is all over the place

The impact runs far and wide. When sales and marketing teams don't trust each other and can't align, you get...

**Disagreements
on lead quality:**

Marketing and sales have no consensus on what makes a qualified lead, creating a cycle of distrust and lost sales opportunities.

**Different ideas
of the customer:**

Incomplete data gives sales and marketing different views of customers, leading sales to target people who don't fit marketing's buyer personas.

**Data
fragmentation:**

Different data living in silos causes fragmentation and lost data that could be used for enrichment and segmentation.

**Missed
opportunities:**

Sales doesn't have the right content, and marketing may not know what the customer needs.

**Messaging
that confuses
customers:**

A lack of clarity of who your customer is leads to conflicting messaging, creating confusion and mistrust.

Long story short, they all lead to a poor customer experience (CX).

But your customer experience
doesn't have to be broken...
if you put your customers at the
center of everything.

In-product experience

Content

New features

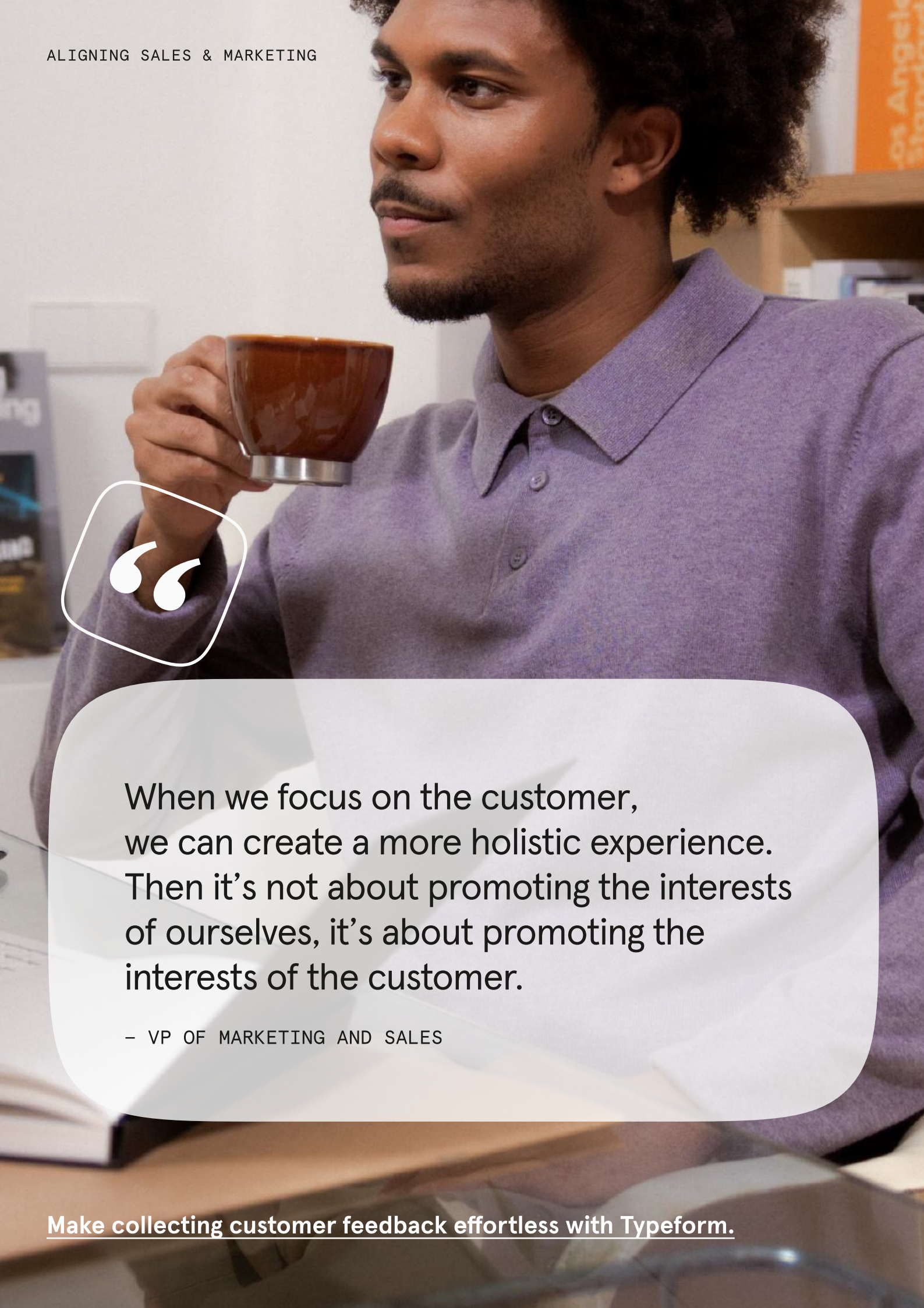


Marketing campaigns

Support

Buyer journey

Creating an open feedback loop keeps your focus where
it should be: on the customer.

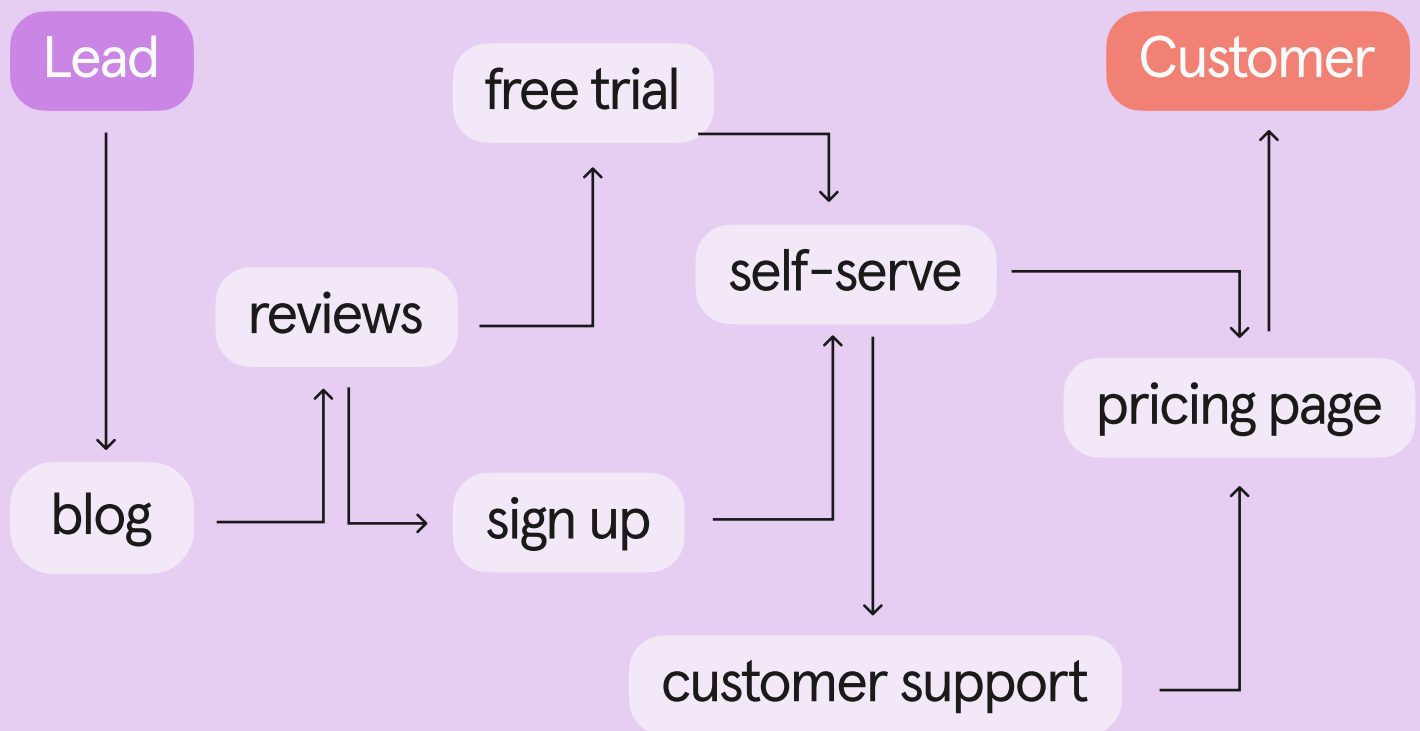


“

When we focus on the customer,
we can create a more holistic experience.
Then it's not about promoting the interests
of ourselves, it's about promoting the
interests of the customer.

– VP OF MARKETING AND SALES

Customer-centric organizations use journey maps to understand every step of the customer journey and create exceptional experiences.



Instead of assuming their customers' journeys, customer-centric organizations walk through them to design better, more personalized experiences.

More than 70% of consumers expect companies to deliver personalized interactions—a powerful reminder that organizations not focused on the customer are already failing on their expectations.

We surveyed over 150 sales and marketing leaders at both B2B and B2B/B2C organizations.

Here's what we found:

78%

of marketers report a good understanding of the customer journey

ONLY

49%

of salespeople report the same level of understanding

Marketers typically have a deeper understanding of the customer journey, while sales is only somewhat tuned in.

The result? Your customers don't get the seamless, personalized experience they expect.

Why it matters

We found that those who reported having a stronger understanding of the customer journey also reported:

- 01: Engaging in significantly higher levels of personalization adoption
- 02: Valuing a variety of stages in the pipeline, not just their own
- 03: Being much more cooperative than competitive as an organization
- 04: Having higher levels of trust in colleagues
- 05: Believing their department and company goals were significantly more aligned
- 06: Feeling like their company was performing much better than others

Understanding the customer journey means starting at the beginning —starting with data that provides crucial insights into who they are.

Do you have the data you need to understand your customers on a deeper level?

Features activated

Birthday

First name

Email

Upsells

Content request

Preferences

Free trials

Subscription status

Support history

First, second, and third-party data have been the standard for data collection for a while now. But as more organizations become customer-centric, they're adding another source of data: zero-party data (ZPD).



Zero-party data, whether through a ticket or otherwise, is super critical. Because it's the thing that's feeding the engine.

– KRISTEN HABACHT
CRO, TYPEFORM

ZPD comes straight from your customers—they share it willingly, and it often includes data you'd get from a conversation with them, like preferences or their view of your brand.

It's the most trustworthy form of data you can get.



You have to talk to the customer.
You *have* to.

– JOAQUIM (KIM) LECHA
CEO, TYPEFORM

80%

of marketers consider zero-party data **extremely important** to their marketing and sales efforts...

BUT ONLY

20%

of salespeople say the same.

And those surveyed who value ZPD were also *significantly more likely* to understand the customer journey.

The takeaway?

Sales has an admittedly lower level of understanding of the customer journey and values ZPD less than their marketing counterparts.

But a lack of data or poor understanding of the customer journey is only part of the problem. The other challenge? **Dozens of disconnected funnels.**

Your customers are sent down scattered, generic journeys. And you lose data when customers switch between funnels. In many cases, they aren't following a traditional “funnel” path anyway.

Customers often find your brand on social and head to your blog, or trial free versions of your product before ever coming in contact with a marketing touchpoint.

The biggest overall change between traditional and modern customers is that many more people are in your product before you're talking to them. The middle is the new entry point into the conversation.

– WILL WAGGENSPACK
VP OF REVENUE OPERATIONS, TYPEFORM

These customers share data with you continuously—through in-product actions, sharing feedback, viewing content, and more.

But all that data flows into different tools, spread across teams... in silos.



More than half of those surveyed cite incomplete data capture as the primary reason for lost customer data.

“

The biggest challenge in a go-to-market motion is that the data exists in isolated spots. Odds are, a company has all the data insights it needs. What they don't have is that data talking to each other.

– KRISTEN HABACHT
CRO, TYPEFORM

From siloed to streamlined

97%

of operations team members surveyed agreed that a lack of standardized data formats—their tech stacks—was the main challenge they faced when transferring data between teams.

A poorly designed tech stack can fragment your entire organization's view of your customer and lay the groundwork for a choppy, impersonal journey.

Complex
& varied
tech-stack

- More challenges related to data transfer
- Revenue negatively impacted by data fragmentation
- More data dropped
- Lower company performance
- More problematic handoff process

Too many tools.

Too many tools not talking to one another.

Too much lost and fragmented data.

They all contribute to a fractured, incomplete lead generation process.

One step of the data unification process is getting your entire GTM team on the same page about who your ideal customer is and how you score leads.



If you have a different scoring algorithm for one set of leads than you do for another, it's not a holistic process.

– WILL WAGGENSPACK
VP OF REVENUE OPERATIONS, TYPEFORM

It's key that sales and marketing work together to create a seamless handoff process so you don't lose qualified data—or leads.

46.5%

Less than half of professionals describe the process of passing leads from one team to another throughout the customer lifecycle as “somewhat smooth.”

Once you unify your team and simplify your tech stack, you have all the tools to build a more tailored customer journey.



Streamlined & simplified tech-stack

- Better lead handoff process
- Higher levels of job satisfaction
- Higher eNPS
- Higher performing
- Revenue not impacted negatively
- Data freed from silos
- Complete picture of your customer



When you have a single repository of data—therefore a single source of truth—you can better serve your customers

– JOAQUIM (KIM) LECHA
CEO, TYPEFORM

Put yourself in your customers' shoes. Map out their *actual* journey—make no assumptions.

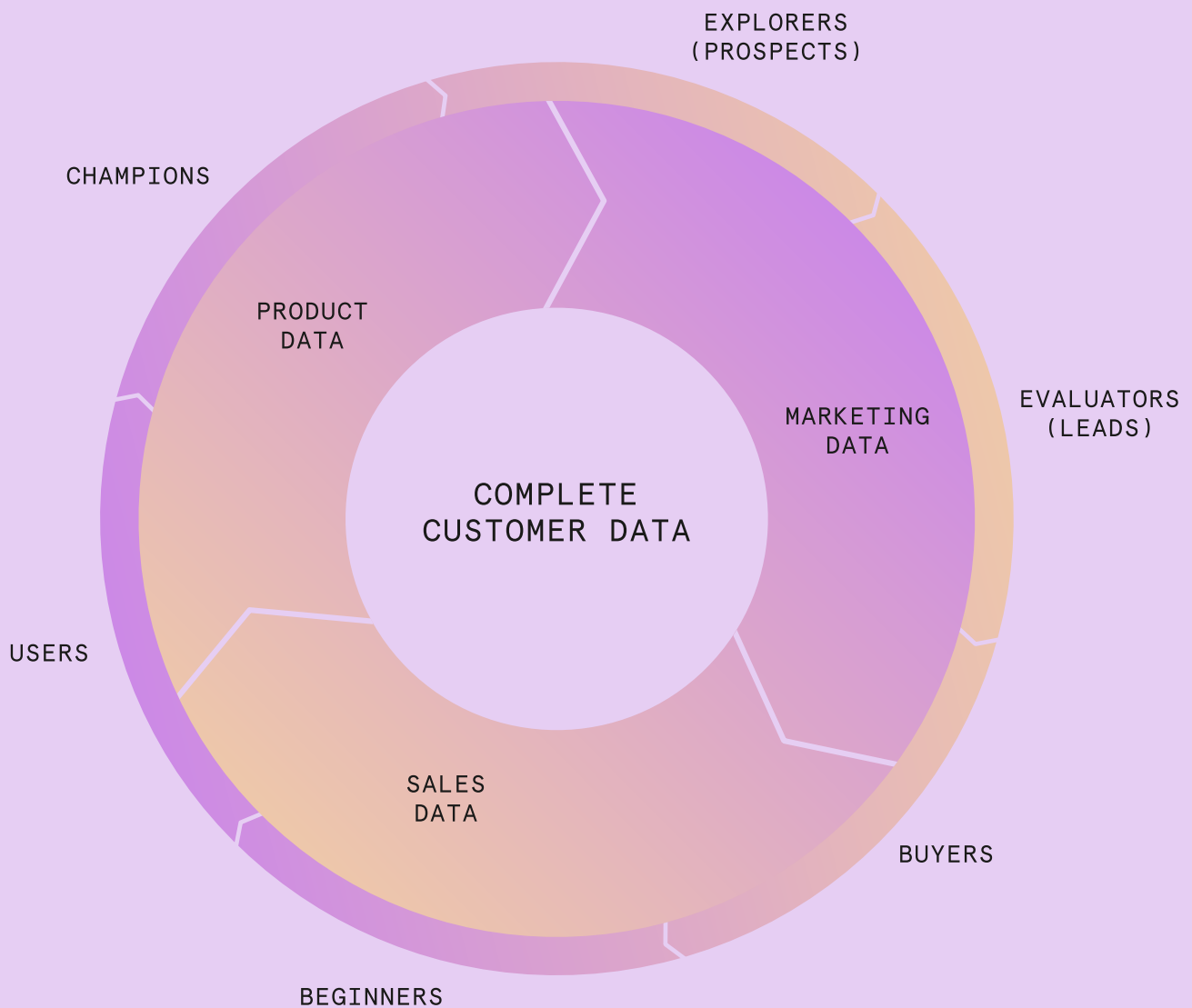
Rarely do customers take the expected journey from point A to point B. Empathizing with their real experiences and creating a clear path lets you put the customer back in the customer journey.



Any time a customer wants something that moves them further along the funnel, you give them the path to do it where they expect to have it.

- WILL WAGGENSPACK
VP OF REVENUE OPERATIONS, TYPEFORM

A single funnel unifies your data, teams, and goals—all while prioritizing your customers.



Instead of treating the customer journey as a linear, one-step-at-a-time process, consider viewing it as a single funnel fed by customer data.

One that meets customers where they are to create a more personalized journey.

Customers expect consistency, whether it's getting help from support or their in-product experience.

They assume you know everything about them—their needs, preferences, history with your product. Data helps you live up to those expectations and continue building the seamless experience they want.

To be a truly customer-centric organization that prioritizes CX, you need to step away from independently-operating departments that have their own siloed goals and directives.

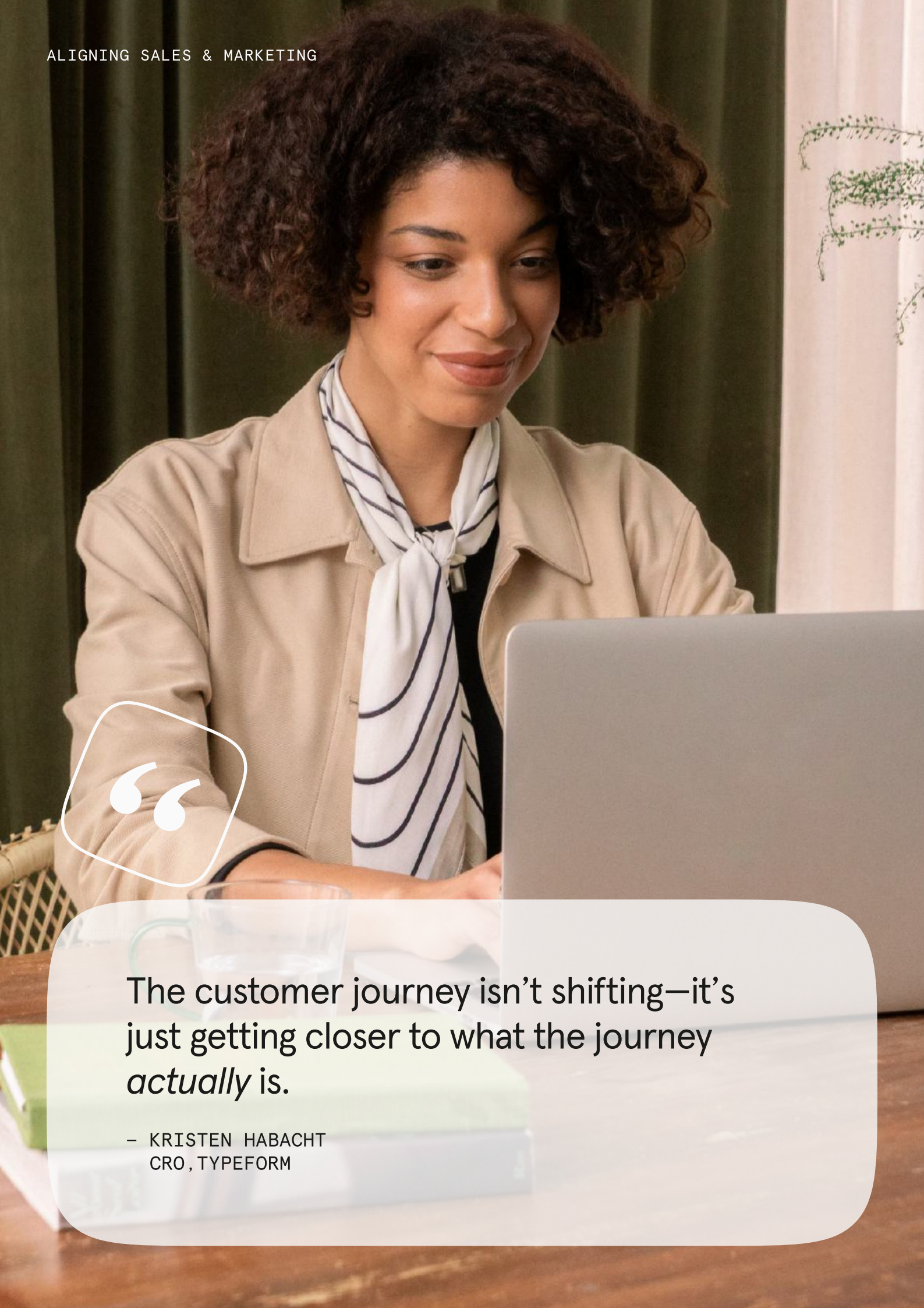
WE FOUND THAT ONLY

13%

of survey respondents feel their departments are highly cooperative.

Departments that don't collaborate might still be productive, but that doesn't mean they're effective.

You want your teams spending their time improving your product and providing excellent customer service, not trying to scapegoat one another.



The customer journey isn't shifting—it's just getting closer to what the journey *actually* is.

— KRISTEN HABACHT
CRO, TYPEFORM

It's impossible to be a true data-driven marketer if you're using fragmented, incomplete data sitting in silos across departments.

More connected tech stacks and teams are only part of becoming more data-driven.

Data enrichment is the missing piece.

HubSpot defines data enrichment as the process of improving the accuracy and reliability of raw customer data. It includes adding new and supplemental information and verifying the information against third-party sources.

It's what adds to your customer profile and allows you to create a better journey and customer experience.

NEARLY

86%

of businesses enrich at least *some* of their customers' zero-party data

Data enrichment combines zero-party data with first, second, and third-party data to help you:

- Personalize every interaction along the customer journey
- Create more targeted marketing campaigns
- Send highly personalized sales outreach
- Build tailored customer experiences
- Enhance lead scoring
- Segment leads and customers more accurately

Our research found:

ONLY

30%

of marketers think enriched data is extremely important

WHILE

80%

of salespeople think enriched data is extremely important

But only 44% of professionals actually enrich **all** of their lead data, and less than 50% felt their enriched data was very accurate.

So how do we lay the foundation for trust and enrich our data?

Use better sources:

Forms, surveys, and quizzes produce the best customer data.

Asking relevant questions at the right touchpoints can help you collect more ZPD

Develop a deeper understanding:

Data loses value when it's fragmented across siloed teams and tools.

It's crucial to unify data across tools to get a complete picture of your customer.

Use data for personalization:

When you have a clear view of your customers, you can pinpoint insights and put them on the right journey.

At the end of the day, data is
just information about people.

– KEVIN BRANSCUM
SENIOR DIRECTOR OF BRAND MARKETING, TYPEFORM

(and the more you have, the better... for you *and* your customers)

It's not about you

Are you building products, creating marketing campaigns, and designing a CX based on what you *think* your customers care about?

Or are you putting them at the center of everything —using enriched data, sharing data across teams, and fully embracing feedback?

The customer journey

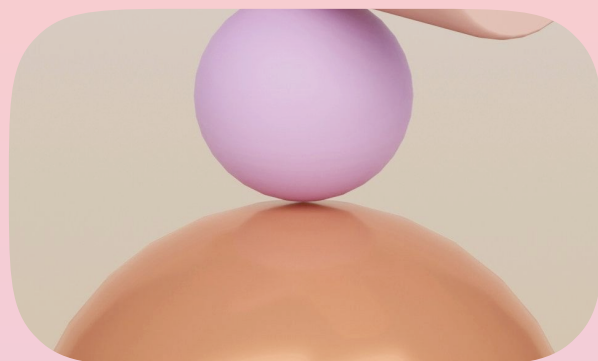
is about



the customer

If you're not using the data they give you to build your products, experiences, and journey around them, **it's time to start.**

You owe it
to your
customers



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