# How marketing can support sales

One thing which is sometimes missing in professional services firms is clarity around how marketing and business development teams can work together to support each other.

What are the best ways for marketing and business development people to work together to make the most of the resources available?

Taking PACE's Pipeline process as a starting point, it's probably easiest to look at each of the five sections in turn and give some ideas as to how marketing can support the sales process.

## P1 Prospecting: Defined prospects not yet marketed to

- Research and come up with a list of possible companies, and relevant contacts, that fit the profile of the 'ideal clients'
- More in-depth research on those companies and individuals where an approach might be made, including recent news
- Data put on CRM system with sufficient detail that links the companies and individuals to the sales process
- Find out if anyone in your firm already has a connection with those companies or individuals

## P2 Promoting : Defined prospects marketed to but not yet in dialog

- Develop a marketing and sales plan for these defined prospects – what activities will help to build awareness and interest in your firm?  E.g. knowing who downloads any guides you have on your website or makes an enquiry so that they can be promptly followed-up; inviting relevant prospects (as well as clients) to seminars; create articles, blogs, tweets around key topics identified by fee earners; contribute to relevant Linked-In groups; articles in prospects' trade press.
- Help to gain and encourage introductions to prospects, where possible
- Help putting together some dynamite collateral for a high impact campaign *(Note: fee-earners need to help here with identifying good subject areas and providing content)*

## P3 Projecting: Qualified prospects – in dialogue

- Coaching in prep for BD meetings
- Create a strong set of sales tools, for further in the process, when they may be needed (proposal templates, PPT templates, case studies)
- Reminders to send touchpoints to maintain contact during what can be weeks, months or even years before they become a client

## P4 Protecting: Current key and valued clients

- Help put together plans for key clients
- Set up and run a key client review process
- Look at 'moments of truth' where clients and prospects come into contact with the firm and identify any points that could be improved
- Make sure that new clients are welcomed and introduced to the team who will work with them

## P5 Pruning: 'Problem children' clients

- Using management information, identify which clients the firm shouldn't be working with or needs to service in a different way, and suggest a course of action

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