HubSpot

Campaigns: The Sales and Marketing Playbook

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Introduction

Few approaches in marketing history have the power and longevity of the campaign. It is a flexible container, ranging from multi-year, global plays to 24-hour discount blasts.

While different markets have distinct expectations for campaigns, scaling enterprises continue to turn to the campaign as a flexible, dependable way to grow revenue and bring products to market.

So, what is a campaign?

While campaign specifics continue to evolve, a few of its traits are here to stay. At its core, a campaign is simply a targeted effort to achieve a specific goal. A few other traits that make a campaign a campaign:

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Focused. Too often, companies launch campaigns that try to bring every facet of their business to market at once. Whether it's a virtual event, product update or something more thematic (like an industry trend or buyer pain point), you should be able to describe the subject of your campaign succinctly.

Time-based. Rather than run in perpetuity, campaigns have a beginning and an end. Long-term motions are effective, but even those break down into smaller, measurable pieces.

Goal-oriented. If your effort doesn't have objective, measurable goals, it's not a campaign. How you measure the effectiveness of campaigns depends on your business and departmental goals.

Say your campaign meets these criteria. It's guaranteed to accomplish its goals, right? Wrong.

Even the most focused, data-led campaigns run the risk of underperformance and disappointment. Sometimes the organic demand for your solution just isn't there. Others, the timing of the entire launch is affected by outside factors and you're unable to capture demand at its peak. But there's still one pitfall that overshadows these: **misalignment.**

Here's the dictionary version:

Mis·a·lign·ment

noun | mis·align·ment

The incorrect arrangement or position of something in relation to something else.

For growth-focused enterprises and their campaigns, misalignment tends to stem from a handful of problematic sources:

Siloed Processes

Before and after a campaign goes live, internal processes set the stage for its performance. These processes range from manual, strategic tasks like dashboard building, creative briefing and goal setting **(<-more on that on the page 7)** to highly automated ones like email automation, lead routing and lead scoring.

Misalignment appears when different teams — and even different people on the same team — perform these activities differently, yielding inaccurate data and gaps in audience experience. Siloed campaign processes also create unclear expectations for those involved in its creation and launch. Without process alignment and standardization, people have different understandings of what is expected from them — or worse — are unaware that they should be involved in the first place.

Cobbled Platforms

As organizations scale, they add to their technology stack. Even thoughtfully-built, progressive companies can continue adding to their toolbox to solve isolated problems, only to later discover that activities as simple as single-channel campaigns require multiple platforms and varying degrees of technical expertise.

Sales and marketing activities often take place in different tools, making it hard to gain a 360° view into prospect activity and interest. As your team jumps from one misaligned platform to another, they lose time and risk missing critical lead intelligence that could speed sales velocity and bring in revenue more efficiently.

"With scaling businesses, large campaigns often translate into organizational nightmares. Assets and data can be housed in dozens of systems. Your emails are sent from one platform, your website and conversation data is stored in another, and sales is working out of a third... Getting a single view into the customer experience becomes near impossible, and reporting fails to tell the full story."

- Vidya Drego, VP of Marketing at HubSpot

Unreliable Data

To drive campaign results and accomplish growth goals, stakeholders across your business — including sales, customer support and operations — need to trust the data at their fingertips.

Reliable data is not a nice-to-have element as you plan for campaigns and growth motions; it is critical to your ability to empathically meet prospects on their buying journey and will determine the success — or failure — of your campaign. Discrepancies caused by platform and process misalignment prevent your marketing, sales and service teams from sharing a common view of your customer's journey and funnel performance metrics.

Disparate Goals

You might invest serious time and resources into a campaign, only to go live and find that your teams aren't consistently measuring its performance. Campaign goals can be wide-ranging and key performance indicators (or KPIs) might shift from campaign to campaign. Some may be revenue-focused and aim to attribute a dollar amount to every asset in the campaign that touched a sale. Others may be brand or awareness-focused if, say, you're entering a new market or territory.

This friction shows up toward the bottom of your sales funnel as marketing aims to drive qualified leads and sales looks to close them. These late stages take close coordination; if marketing doesn't understand what good, likely-to-close demand looks like, they may produce and distribute the wrong content. If sales is unaware of the campaign and its goals, they may be ineffective at closing the demand they do get.

What matters most is that your entire organization is in lockstep when it comes to evaluating campaign outcomes — otherwise, you won't learn what works and optimize in the future.

Why misalignment matters

Misalignment isn't a single catastrophe that 'happens' to growing organizations. If you're overscheduled with business acquisition, product development and customer service responsibilities, misalignment is more likely to settle in long-term – one new platform and process at a time.

But there's a problem with that slow crawl of misalignment: it may not feel urgent, and therefore might go unaddressed. Here's what happens when businesses without proper alignment go to market with a campaign.

You damage the prospect and customer experience

Imagine you're one of your business's qualified prospects.

You've read up on solutions, attended a few webinars and recently had a 45 minute demo with a senior sales representative. You're ready to bring commercial details to your CFO and see if this solution can do what it's supposed to. You have a relationship with this potential vendor now – you trust the voice of their content and feel connected to their vision. It's a matter of time before you become a customer.

Then you get a templated, automated campaign email, signed by an entry-level BDR, asking if you're available for a 'quick discovery call'.

Once the confusion passes, your first thoughts are, "Does this company see me as a valuable partner? Will they be this disjointed when I need customer support?"

A simple disparity between two cobbled CRMs opens the door for lead intelligence errors, resulting in damaged customer experiences. Imagine this happening to multiple late-stage opportunities at once. Depending on the stability of the deal, misaligned campaign platforms can seriously jeopardize top-line revenue.

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You leave money on the table

A well-designed campaign will target contacts based on their recent digital behavior and alignment with your target customer profile. Enterprise content campaigns, for example, perform best when the material is sent only to those contacts who will find it most relevant and timely. However, siloed customer data or misaligned campaign goals could keep your team from agreeing on exactly what to send and to whom.

That means you likely have prospects in your funnel who would benefit from campaign enrollment but don't make the cut because you couldn't track their behavior and engagement accurately enough across their buyer journey.

Say your marketing automation platform defines Marketing Qualified Lead one way, and your CRM defines it using different criteria. Using one system's definition of MQL to select a campaign audience means that scores of potential high-fit leads from the other system go untouched.

How much top-line revenue will that cost over a year with 10–15 campaigns?

"At HubSpot we not only involve our sales org in revenue-campaigns, we depend on them. This partnership involves everything from defining good-fit audiences to prioritizing sales motions or mapping out the lead hand-off process. This helps us feel confident that the content we create will resonate with our buyers and that reps will be excited to put it to use."

- Juliana Nicholson, Marketing Campaign Lead at HubSpot

You create friction across teams

Going to market with a new product or big campaign is an enterprise-wide undertaking. A lot is at stake; even the most effective organizations work long hours to finesse campaign material and build out reporting infrastructure before launch day.

When you add a disparate tech stack and siloed processes to these projects, inter-team friction becomes a business-critical problem. In addition to the dysfunction and stress on employees, misalignment between sales, marketing and other back-office teams can result in a cobbled approach to campaign creative, sequencing and, ultimately, overall results and goal attainment.

Because different teams complete their campaign tasks in a vacuum and lack visibility into tactical decisions outside their discipline, blame tends to spread quickly if campaigns underperform.

Misaligned campaign goals and reporting needs are another key source of cross-team friction — particularly for larger organizations with multiple campaigns and growth motions underway at any given time.

Without a single source of truth for campaign-level KPIs and performance against them, different teams will measure success based on their departmental goals: marketing will look to maximize leads and traffic, sales will want to see booked meetings and closed business, and service will want to ensure that customer marketing was done judiciously and carefully to maintain customer loyalty. Depending who you ask, the entire initiative was either a hit or a miss.
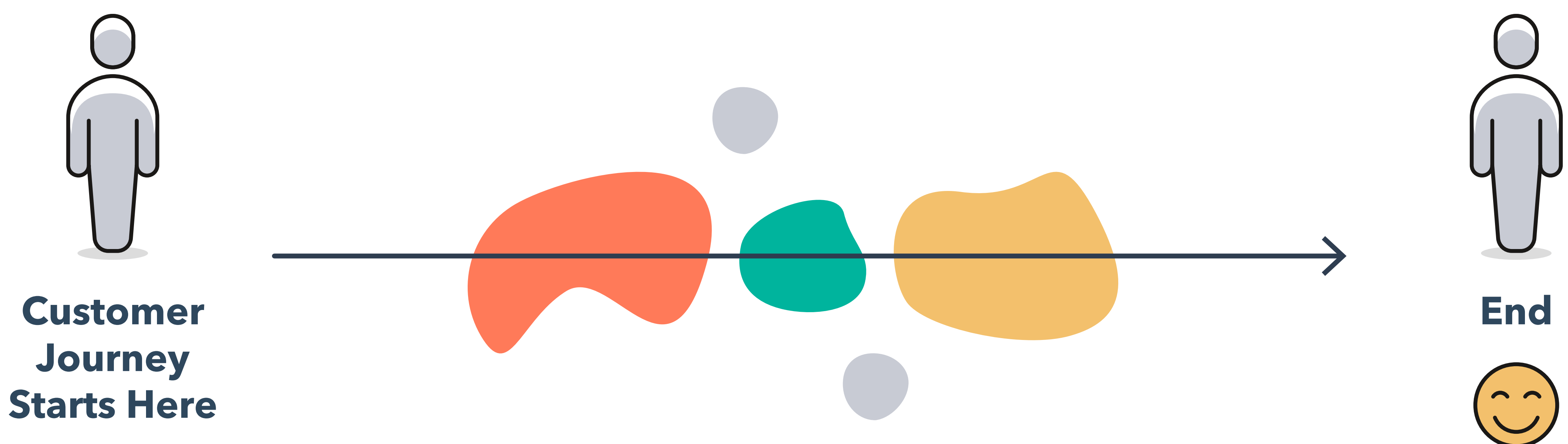
Marketing team   **Sales team**   **Service/operations team**

Misaligned

Customer Journey Starts Here

End

Aligned

Customer Journey Starts Here

End

Campaigns shouldn't be a negotiation founded in misalignment. Campaigns should be a partnership built on transparency.

The key to alignment

The secret to alignment lies in a thoughtful approach to the entire ecosystem of people, processes and platforms that launch and leverage campaigns every day. So, what do enterprises need in order to bring aligned, impactful campaigns to market?

"As the market changes, as buyers evolve and as competitors multiply and grow stronger, there's a constant need for sales reps to adjust their GTM approach. They can't effectively do this without alignment with their marketing team, from brand perception and demand gen to deal nurturing and product marketing resources."

— Sam Schoolman, Director of Corporate Sales at HubSpot

Aligned processes

Cross-functional work is critical to campaign effectiveness and overall launch efficiency. Companies that unite their sales, marketing and service teams around standardized processes do more with less, and can move through their changing market with greater agility and focus.

Repeatability within a unified CRM and automation tool also allows teams to launch campaigns with fewer man-hours than would be required using multiple platforms, keeping enterprise teams lean and reducing the long-term cost of customer acquisition.

Processes built around a simplified tech stack also reduce errors in lead handling and follow-up. Knowing which sales stakeholder is working a particular prospect in your CRM is key information that requires absolute team-level transparency and alignment.

When layered onto a single source of contact ownership data, a consistent routing and assignment process can all but guarantee that even large enterprise sales teams capture all the demand in their funnel with minimal downtime and leakage.

Crafted platforms

Rather than use individual features from a disconnected set of tools, a purposefully crafted, campaign-focused platform helps unify all of the key elements of holistic campaign management. To coordinate more effectively with cross-functional team members in sales, marketing and service, you'll need a platform that gives you a single view into the customer journey and engagement lifecycle.

This level of visibility will show you a contact's digital behavior and let you drive more prospect-driven, contextual sales conversations. A crafted campaign platform also fosters more agile, adaptable marketing automation, giving marketing and BDR leaders the means to enroll contacts in hyper-relevant workflows based on prospect behavior — all without leaving the tool and jumping to another login.

This time, imagine you're the same qualified prospect. You've done the same research, attended webinars and gone through a demo.

In addition to the close personal rapport you've built with the rep working your partnership, you've gotten a handful of marketing emails that meet you exactly where you are — helpful content on how you and your CFO can evaluate platforms, product collateral to share with your ops and admin team — all with the same tone and brand alignment as the sales rep.

You're not questioning this vendor's effectiveness. Quite the contrary; you're thinking, "I'm excited to partner with such a proactive company that intuits our needs."

A purposefully crafted, campaign-focused platform helps unify all of the key elements of holistic campaign management

Unified data

Robust campaigns pull data from an array of sources: past campaign performance data from marketing and attribution reports, cross-channel response and submission rates, A/B testing details on social creative, lifecycle stage breakdown for current contacts — and that's a fraction of the list.

Aside from the monotony of jumping into a handful of different SaaS and ERP tools to get these critical data points, the error rate on the data itself is far lower when tied into a single platform.

Alignment on campaign strategy and KPIs requires a fundamental confidence in this pipeline and performance data; otherwise, investing resources into campaigns is a gamble.

When this data is housed in a single place, teams can learn from one another faster and rely on real-time updates to the entire stack of tools and data — no delays or lag as you eagerly move through campaign material to source new business.

Campaign aligment in action

🔴 **Marketing outcome**

Enhanced prospect and customer experience

🟢 **Sales outcome**

Capture maximum demand and deliver richer conversations

🟡 **Service/operations outcome**

Understand customer engagement and interaction across campaign lifecycle

Start ← → **Finish**
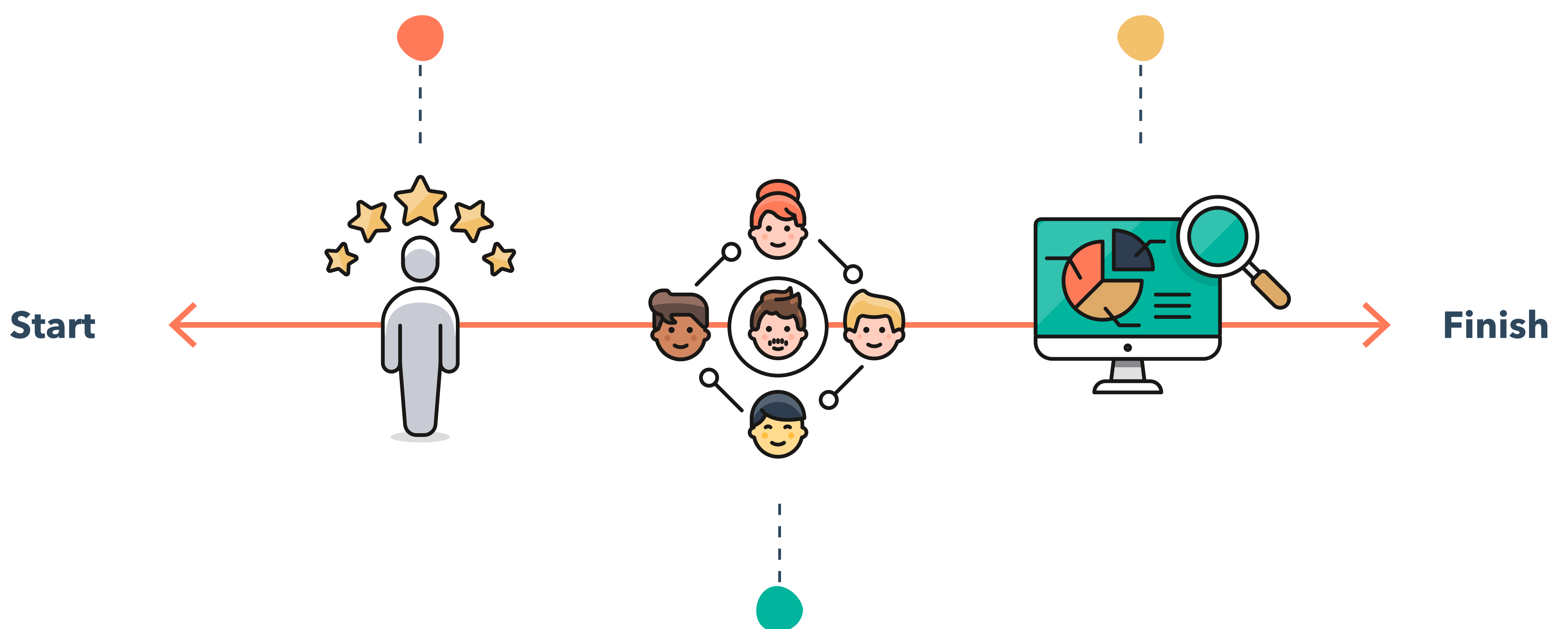
Checklist:
How to maximize campaign alignment

Start with 'why'

Before you establish measurable goals, align every stakeholder and key decision-maker around the purpose of your campaign.

- ☐ How do we want our market to view us after this?
- ☐ What turning point/evolution is marked by this campaign?
- ☐ What forces/pressures are driving this campaign? Internal? External?
- ☐ Why are we doing this campaign now; not last year or next year?
- ☐ What are we bringing to market? What's the associated selling motion?

Set clear goals

How will your enterprise measure campaign success? Here are a few performance metrics you should consider:

- ☐ Subscriber and lead acquisition
- ☐ Number of qualified leads
- ☐ Lead movement/conversion from a specific funnel stage to another
- ☐ Demo requests
- ☐ Qualified meetings booked
- ☐ Content downloads/event attendees

This step is as much about cross-team alignment and clear 'number ownership' as it is about the specific KPIs you use.

Assess Your Tech Stack

Understand the capabilities and limitations of your marketing automation and CRM platforms by asking:

- ☐ Does Marketing, Sales, and Service data live across multiple platforms?
- ☐ Where are integration break points?
- ☐ Is there native Campaigns functionality?

Do your homework

What data can you access to inform creative, launch and audience decisions? Using a crafted platform to manage campaigns, you should be able to examine the following:

- ☐ Past campaign performance
- ☐ High-performing channels
- ☐ Weak links in funnel conversion
- ☐ High-impact workflows and automation sequences
- ☐ Revenue attribution for detailed activities

Prep in advance

Frontload as much automation, asset creation and planning as possible. A well-executed campaign in the right platform should 'turn on' and do much of the work for you.

- ☐ Create follow-up communications to ensure immediate response to campaign engagement
- ☐ Pre-write and plan long-term follow-up emails and retargeting campaigns
- ☐ Build campaign-specific workflow logic to personalize prospect engagement
- ☐ Set up dashboards and reports to track performance by the minute in real time

What you prepare in advance will depend on your campaign KPIs and, at times, your team bandwidth. Ultimately, creating a clear, linear experience for prospects matters more than the volume of automated assets in a campaign.

Automate processes

"A lead just came in. Should I write her an email?" If you prep in advance and build follow-up logic as part of your campaign, you can write these emails at scale. Some other ways to automate campaign processes:

- [ ] Assign contact properties (like lead score and persona profile) based on form submissions
- [ ] Customize notifications to the right sales reps based on relevant contact properties
- [ ] Send content in a weeks-long email sequence and auto-unenroll leads if they talk to sales

Make reporting transparent

You'll need reliable performance reports before, during and after your campaign. Here are some strategic must-haves for report-building:

- [ ] Full lifecycle visibility; how did the campaign move contacts through funnel?
- [ ] A/B performance for creative assets and emails to inform agile shifts and future work
- [ ] Transparency across teams so that sales, marketing and service teams operate using the exact same campaign data
- [ ] Consistent definitions and terminology across teams and platforms

Conclusion

Campaigns can be a key growth accelerator, but only if cross-functional teams work in alignment. Campaign alignment needs more than a growth mentality and commitment to collaboration. It requires a crafted – not cobbled – platform to support activities and drive enterprise results.

HubSpot's platform is the only Marketing Automation system built on top of a CRM. Not only are all of your campaign tools in one place, but all of your customer data is, too. The platform facilitates a single customer view and powers seamless, inter-team alignment with simple, easy-to-use features.

Adopt today's most effective campaign tactics, align on strategic goals and campaign priorities, and adapt with the agility only offered in a unified, crafted platform.
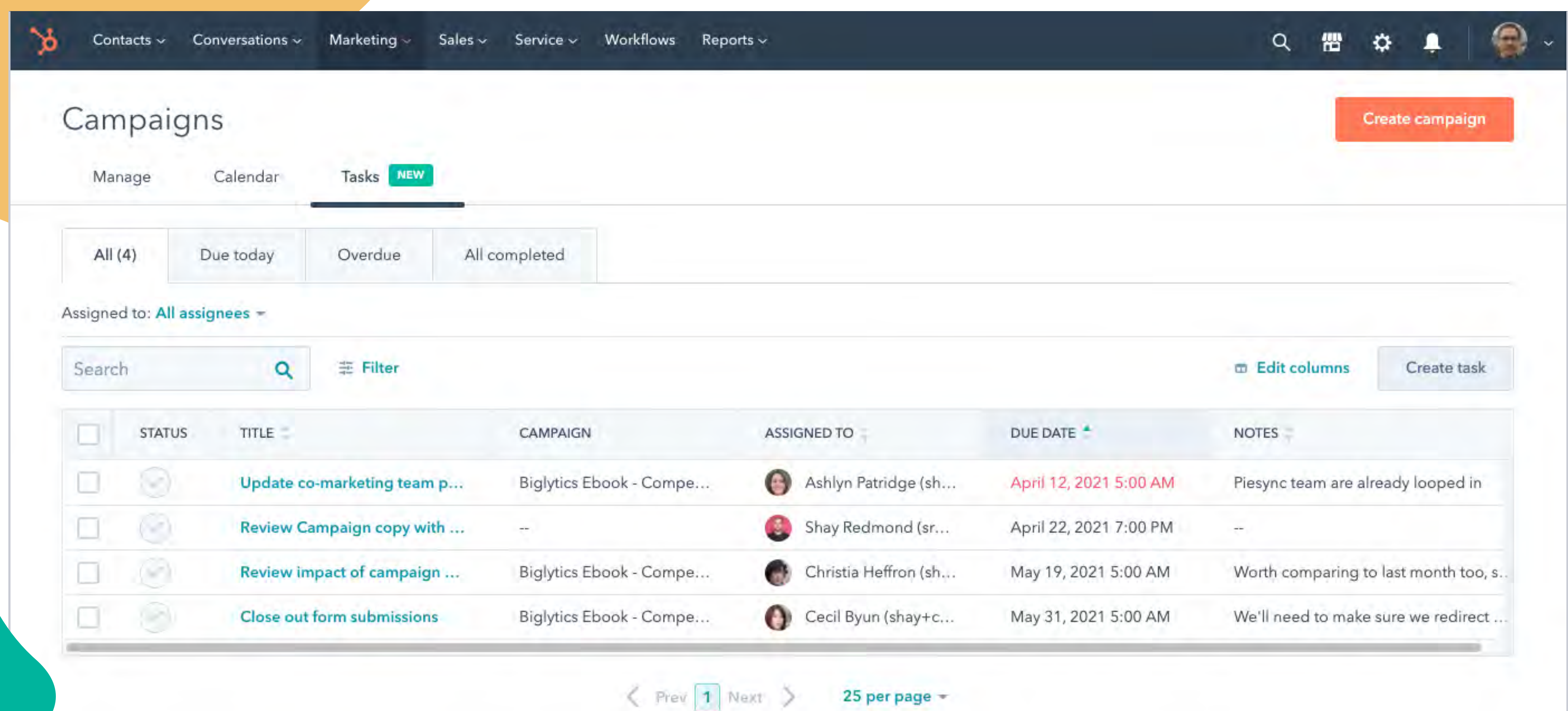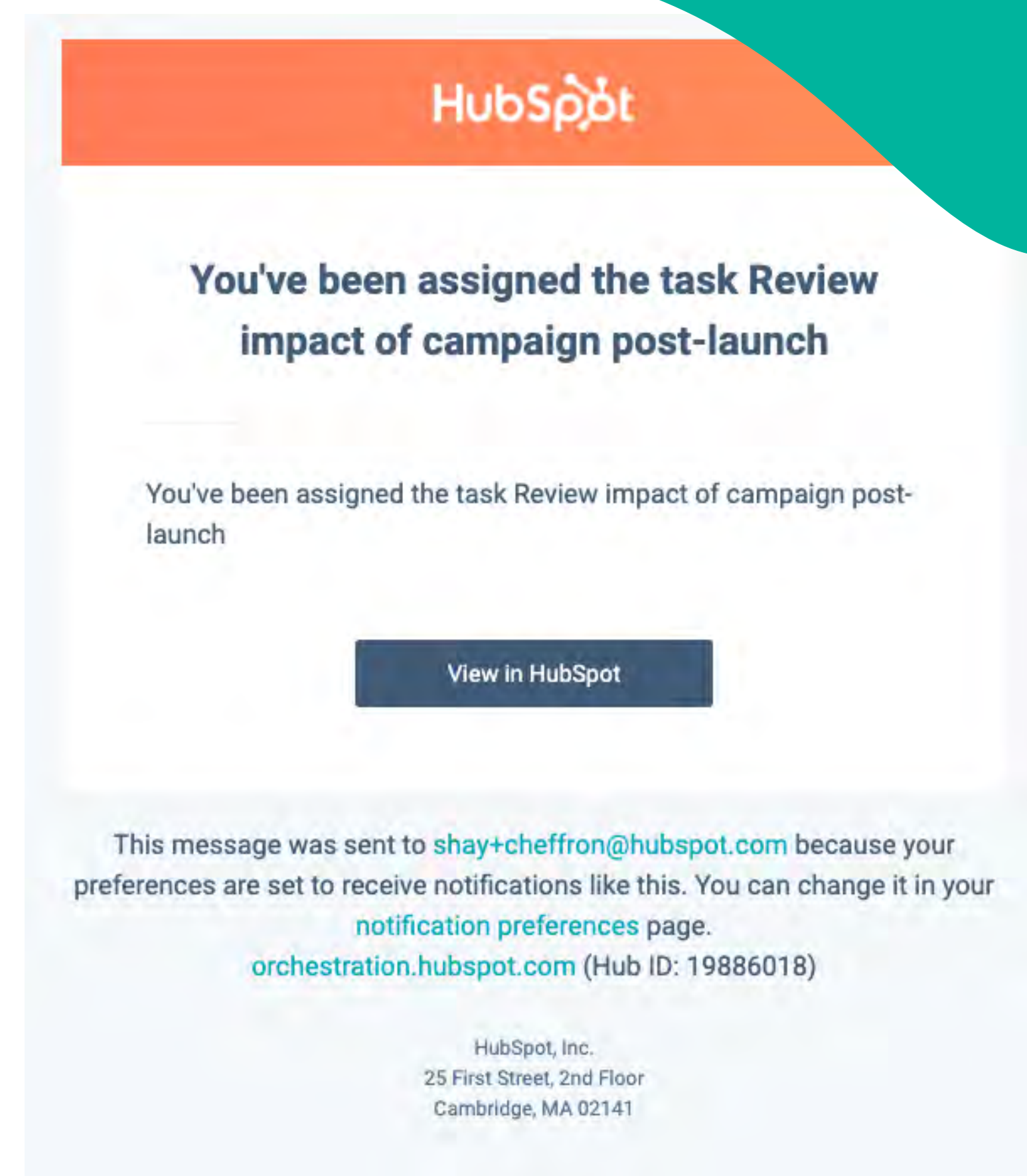
Marketing Hub Professional

Marketing Hub Professional has everything marketing teams need to demonstrate ROI, run automated campaigns at scale and collaborate seamlessly.

Outcomes:

- Align your teams around every component of a campaign
- Track complex campaigns with one source of data
- Enjoy effortless collaboration
- Access real-time campaign reporting

Get Started

HubSpot

The HubSpot CRM platform makes it easy for your entire company
to work together — from marketing, to sales, to customer service.
Each hub is powerful alone, but they're even better together.