DISSERTATION

DETERMINING BEST PRACTICES FOR INTEGRATING MARKETING AND SALES IN ORGANIZATIONS: USING THE DELPHI TECHNIQUE

Submitted by

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ABSTRACT

DETERMINING BEST PRACTICES FOR INTEGRATING MARKETING AND SALES IN ORGANIZATIONS: USING THE DELPHI TECHNIQUE

Using the Delphi technique; combining a thorough review of literature, with opinions of experts during three rounds of data collection, this study determined best practices for integrating marketing and sales in organizations. A purposeful, heterogeneous sample of marketing and sales executives, with a minimum of 30 years experience, in seven different industries, with 40 different organizations around the world participated as experts.

Organizations that integrate marketing and sales can improve business performance; increase efficiency, effectiveness, customer and employee satisfaction. Eleven best practices for integrating marketing and sales in organizations were determined: communication; clearly defined roles, responsibilities and expectations; performance metrics; a customer focus; strategic planning; organizational knowledge; training and education; shared/aligned rewards; organizational intelligence (i.e. market, competitor, and customer information); lead management; and common technology platforms; resulting in the development of Watson's Integrated Marketing and Sales Best Practices (WIMS BP) model.

ACKNOWLEDGEMENTS

There are a number of people, without whose support, earning my PhD and writing this dissertation would not have been possible. As such, I am deeply indebted to my friends, family, and committee who graciously stood beside me while I pursued my PhD. Sincere thanks and gratitude to the experts who participated in this study and my committee: Dr. Gene Gloeckner, Dr. Thomas Ingram, Dr. Carole Makela, and Dr. James Folkestad. I was honored and humbled to work with such a distinguished committee. I feel academically and personally enriched through my time and experiences with these individuals; each of whom played an unique and valuable role in the writing of this dissertation and my development as a scholar. A special thanks to my advisor, Dr. Gene Gloeckner, for his guidance, mentorship, patience, and persistent encouragement.

DEDICATION

This dissertation is dedicated to all my friends, family, and committee members who encouraged, supported, and believed in me throughout this journey; especially SAS, who not only provided invaluable support, but also has been making me laugh (and getting me in trouble) since 2010. Thank you for standing by me.

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When sales and marketing are aligned, clear boundaries exist between the two, but they are 'flexible'. The groups engage in joint planning and training. The sales group understands and uses marketing terminology such as "value proposition" and "brand image." Marketing people confer with sales people on important accounts (Kotler, Rackham, & Krishnaswamy, 2006).

Best Practices

Best practices are procedures that are preferred or considered standard within an organization (*Dictionary.com, 2016*); a procedure that has been shown by research and experience to produce optimal results and that is established or proposed as a standard suitable for widespread adoption (*Merriam-Webster.com, 2016*); methods or techniques that have consistently shown results superior to those achieved with other means, and that are used as a benchmark (*Businessdictionary.com, 2016*).

Collaboration

Kahn and Mentzer (1998) define collaboration as efforts that achieve goals collectively, have mutual understanding, work informally together, ascribe to the same vision, and share ideas/resources. Collaboration represents the unstructured, affective nature of interdepartmental relationships (Kahn, 1996).

Cooperation

Cooperation is defined as working together for a common purpose (*Dictionary.com, 2016*); the act or process of working together to get something done (*Merriam-Webster.com,* *2016*); and a voluntary arrangement in which two or more entities engage in a mutually beneficial exchange instead of competing (*Business Dictionary.com, 2016*).

Coordination

Coordination is the process of organizing people or groups so they work together properly and well (*Merriam-Webster.com, 2016*); the action of setting in order (Dictionary.com, 2016).

Delphi Method

The Delphi method, also referred to as Delphi technique, is a mixed methodology. It is an iterative process used to collect and distill anonymous judgments (and opinions) of experts, using a series of data collection and analysis techniques, interspersed with controlled feedback to the experts (Skulmoski, Hartman, & Krahn, 2007).

Expertise

Expertise exists in various forms and there are general characteristics of individuals who, in a given context, demonstrate a level of wisdom, insight, theory, practice, experience, and analysis not common to all individuals. Expertise implies the individual participant has more knowledge about the subject matter than most people, they possess certain work experience, or are members in a relevant professional association (Hill & Fowles, 1975). Experts by definition are credible, influential sources, with high levels of knowledge (often combined with experience) on a given topic (Powell, 2003).

Integration

Integration is the process of attaining close and seamless coordination between several departments, groups, organizations, systems. etc. (*Business Dictionary.com, 2016*). Integration is seen as reflecting how harmoniously different departments of an organization work together and how tightly coordinated their activities are (Barki & Pinsonneault, 2005).

Marketing

The American Marketing Association defines marketing as the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large (American Marketing Association, 2016).

Organization

An organization is defined as a company, business, club, etc. formed for a particular purpose (*Merriam-Webster, 2004*)..

Sales

Businessdictionary.com (2016) defines sales as the activity or business of selling products or services. Sales is the personal or impersonal process where the sales person ascertains, activates, and satisfies the needs of the buyer to the mutual, continuous benefit of both buyer and seller (Oliva, 2006).

CHAPTER 1: INTRODUCTION

Overview of Problem

A decade ago, in a Marketing Science Institute workshop on inter-functional interfaces, the conflict between marketing and sales was identified as one of the critical areas that need to be addressed (Biemans, Brenčič, & Malshe, 2010; Montgomery & Webster, 1997). The sales and marketing interface exhibits one of the most contentious relationships within organizations and is attracting increasing attention from both academicians and practitioners (Madhani, 2015). Webster (1997, p. 45) stated, “The relationship between the sales and marketing functions has persisted as one of the major sources of organizational conflict. The appropriate relationship between the sales and marketing functions is still an unresolved issue” (Le Meunier-FitzHugh & Piercy, 2009). “Nowhere is the need to work together more important than in the twin customer-facing functions of marketing and sales” (Shapiro, 2002, p. 2).

In 2011, the Andeta Group conducted research on sales and marketing alignment for 160 business units in Europe and the United States, and found 25 percent of the companies had ‘high’ alignment between sales and marketing (Madhani, 2015). In half of the surveyed companies, there were regular conflicts between sales and marketing (Madhani, 2015).

Increasingly, companies are exploring the advantages of integrating marketing with sales, an approach positively linked with improvements in business performance, for which there is convincing empirical evidence (Lyus, Rogers, & Simms, 2011; Massey & Dawes, 2007). As the sales and marketing interface has a direct and significant impact on customers it is possibly of greater importance to improving business performance than many other internal interfaces (Dawes & Massey, 2005; Homburg & Jensen, 2007; Le Meunier-FitzHugh & Piercy, 2007a; Le Meunier-FitzHugh & Piercy, 2010; Rouziès, Kohli, Michaels, Weitz, & Zoltners, 2005). Practitioners have confirmed integrating marketing and sales is not straightforward (Lyus et al., 2011). Further, the integration of marketing and sales has recently become the subject of academic interest, including numerous calls for further research (Lyus et al., 2011; Madhani, 2015; Massey & Dawes, 2007).

There is no widespread agreement on the nature of the marketing and sales integration construct. The literature on the topic is theoretical (Dewsnap & Jobber, 2000, 2002; Rouziès et al., 2005). Clear and detailed specification of the construct is still lacking (Guenzi & Troilo, 2006). Additionally, an analysis of the specific drivers and consequences of marketing and sales integration is still missing (Guenzi & Troilo, 2006).

Research has generally found a positive relationship between integration and different measures of organizational performance (Barki & Pinsonneault, 2005). Organizations that effectively integrate their sales and marketing activities are much more likely to achieve better corporate performance in terms of sales, profitability, market share, and customer satisfaction (Madhani, 2015). They seem to enjoy a constructive, harmonious marketing–sales interface. There is mutual respect, information is freely shared, and both functions are involved in each other's activities to increase the organization's overall performance in the marketplace (Biemans et al., 2010). Sales and marketing must work together to achieve organization goals as sales and marketing integration is increasingly recognized as a key driver for improving financial and operating performance (Madhani, 2015).

Integration is a complex and multi-facet construct (Guenzi & Troilo, 2006). It occupies a central place in several domains, including management, strategy, organization theory, production/operations management, and information systems (Barki & Pinsonneault, 2005). According to Dawes and Massey (2005), integration between marketing and other departments is of growing academic and managerial importance. This interest was validated by Mandhani (2016) who, citing Kahn and Mentzer (1998), stated academic research focused more on marketing's interaction with other functions such as research and development, manufacturing, and finance.

There have been several calls for additional research concerning the marketing and sales organizational interface (Dewsnap & Jobber, 2000; Piercy, 2006; Rouziès et al., 2005; Shapiro, 2002; Workman, Homburg, & Gruner, 1998). Homburg et al. (2008) suggest research should collect data from multiple respondents; conduct in-depth analysis of structural linkages and integration mechanisms of marketing and sales; as well as analyze moderating effects—such as the effect of customer concentration.

> Sales and marketing research should not only focus on analyzing factors that detract sales and marketing integration, but also to establish symbiotic relationship between sales and marketing and identify facilitators of such integration in terms of necessary resources and capabilities required by the organization. (Mandhani, 2016, p. 19)

Purpose Of The Study

Integrating marketing and sales is a complicated multi-faceted issue, which requires exploration and consideration of many factors. Although it has been a concern of organizations around the world for many years, it is just beginning to gain attention among academic researchers. The number of variables impacting the integration of marketing and sales contribute to the complexity of this issue. While professional marketing and sales practitioners have been placing blame on the ‘other’ function for years, scholars have recently begun exploring this conflicted relationship, causes, and impact on organizational performance. Although there is a preponderance of evidence validating the need to integrate marketing and sales in organizations, as well as the value and benefits of doing so, academic research is barely scratching the surface. The existing marketing and sales integration literature has yet to fully explore sales and marketing integration (Le Meunier-FitzHugh & Piercy, 2010). It is disparate, exploring such topics as barriers to integration, marketing and sales interaction, collaboration, coordination, and, more recently, integration. It does not offer solutions of how practitioners can work to integrate marketing and sales. This research study aims to fill this gap in the literature by determining best practices for integrating marketing and sales in organizations (Figure 1). If these practices can be identified, they may be used to improve integration between sales and marketing, thereby assisting organizations to gain advantage in highly competitive environments by improving business performance, providing greater responsiveness to customers and markets; increasing customer and employee satisfaction, as well as revenue. New insights into the complex relationship between sales and marketing may also be generalizable to other internal interfaces.

Research Hypotheses

Based on a thorough review of the literature, combined with the researcher’s 30 years experience as a marketing executive (working with over 17 organizations), it is hypothesized the following practices for integrating marketing and sales in organizations will be validated as ‘best practices’: communication, a focus on customers, facilitation of organizational knowledge, strategic planning, gathering and distribution of intelligence (market, customer, and competitor), and lead management.

Figure 1. Representation of purpose statement to determine best practices for integrating marketing and sales.

Definitions of Terms

A variety of synonyms are used throughout academic literature by scholars who research and write about marketing and sales integration, or lack thereof. For example, Le Meunier-FitzHugh and Piercy, who focus on collaboration and coordination of marketing and sales, published two articles in 2007 referencing Kahn (1996) as the basis for their preference of terms; stating collaboration represents the unstructured, affective nature of interdepartmental relationships (Le Meunier-FitzHugh & Piercy, 2007a, 2007b). However, Kahn (1996) actually stated interdepartmental integration is a combination of interaction and collaboration. Interaction includes communication flow among organizational units; and effective interaction takes place when functions regularly exchange information in a ‘structured’ way. Additionally, when referencing a review of case studies, Le Meunier-FitzHugh and Piercy (2007b) indicated collaboration between sales and marketing had a positive impact on business performance, and collaboration was not just based on close working relationships, but must be supported by aligned goals and 'integrative' processes.

It is the opinion of this researcher 'integration' of sales and marketing will have the most impact on improving their relationship, while optimizing organizational performance. As indicated in terms defined, coordination relates to 'organizing' work and people; while collaboration is informal and unstructured; and cooperation is voluntary. Integration is a structured and formalized approach, which entails coordination and collaboration, encompassing processes, systems and activities; which in business environments is more likely to lead to success, including improved relationships and performance.

In addition to clarifying the use of the term 'integration', several other terms and definitions are presented or understanding the context in which they are used in this study.

Alignment

When sales and marketing are aligned, clear boundaries exist between the two, but they are 'flexible'. The groups engage in joint planning and training. The sales group understands and uses marketing terminology such as "value proposition" and "brand image." Marketing people confer with sales people on important accounts. They play a role in transactional, or commodity, sales as well (Kotler, Rackham, & Krishnaswamy, 2006).

Best Practices

Best practices are procedures that are preferred or considered standard within an organization (*Dictionary.com, 2016*); a procedure that has been shown by research and experience to produce optimal results and that is established or proposed as a standard suitable for widespread adoption (*Merriam-Webster.com, 2016*); methods or techniques that have consistently shown results superior to those achieved with other means, and that are used as a benchmark (*Businessdictionary.com, 2016*).

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Cooperation

Cooperation is defined as working together for a common purpose (*Dictionary.com, 2016*); the act or process of working together to get something done (*Merriam-Webster.com, 2016*); and a voluntary arrangement in which two or more entities engage in a mutually beneficial exchange instead of competing (*Business Dictionary.com, 2016*). From the Latin *co*, meaning “together,” and *operari*, “to work,” cooperation refers to situations in which people work together to achieve mutual goals; cooperation is not just the mere absence of conflict (Borders, 2006). Cooperation is proactive; acquiescence is reactive (Borders, 2006). Two key characteristics associated with effective cooperation are commitment and trust. Commitment and trust lead directly to cooperative and coordinative behaviors (Borders, 2006). Both theory and empirical evidence indicate trust leads to cooperation (Borders, 2006).

Coordination

Coordination is the process of organizing people or groups so they work together properly and well (*Merriam-Webster.com, 2016*); the action of setting in order (Dictionary.com, 2016).

Delphi Method

The Delphi method, also referred to as Delphi technique, is a mixed methodology. It is an iterative process used to collect and distill anonymous judgments (and opinions) of experts, using a series of data collection and analysis techniques, interspersed with controlled feedback to the experts (Skulmoski, Hartman, & Krahn, 2007). The Delphi technique, first used in the 1950s for a United States Air force research project, was developed by Olaf Helmer and Norman Dalkey at the RAND Corporation (Gupta & Clarke, 1996; Dalkey, Brown, & Cochran, 1969).

The technique was named after the ancient Greek oracle at Delphi, from which prophecies were given (Yousuf, 2007). The Greek god Apollo Pythios who, as a master of Delphi, was renowned for his ability to predict the future (Goodman, 1987). The legend of the Greek Delphi oracle stems from an early Homeric poem to Apollo. The oracle had a network of informants and was considered to be one of the most truthful – with data derived from many sources (Kennedy, 2004). An oracle refers to a statement from someone of unquestioned wisdom and knowledge or of infallible authority (Yousuf, 2007).

Expertise

Expertise is a component of the credibility construct, which refers to the perceived level of contextually relevant knowledge of the source (Malshe, 2010). Extant research suggests the receiver's perception of the source possessing higher levels of expert power, enhances the source's trustworthiness, and thereby credibility, in the eyes of the receiver (Malshe, 2010; Moorman, Rossman, & Zoltners, 2007; Palmatier, Miao, & Fang, 2007).

Expertise exists in various forms and there are general characteristics of individuals who, in a given context, demonstrate a level of wisdom, insight, theory, practice, experience, and analysis not common to all individuals. It is these individuals to whom the term 'expert' is assigned. Expertise implies the individual participant has more knowledge about the subject matter than most people, they possess certain work experience, or are members in a relevant professional association (Hill & Fowles, 1975). Experts by definition are credible, influential sources, with high levels of knowledge (often combined with experience) on a given topic. Their broad-based influence may span a wide variety of industries, disciplines, practices, and geographic boundaries (Powell, 2003).

Integration

Integration is the process of attaining close and seamless coordination between several departments, groups, organizations, systems. etc. (*Business Dictionary.com, 2016*). Kahn (1996) suggests interdepartmental integration is a combination of interaction and collaboration. Interaction regards communication flow between organizational units. Effective interaction takes place when functions regularly exchange information in a structured way through meetings, memoranda, documents, etc. Collaboration, on the other hand, requires that departments are willing to work together and share the same vision, goals and resources (Kahn, 1996). Integration is seen as reflecting how harmoniously different departments of an organization work together and how tightly coordinated their activities are (Barki & Pinsonneault, 2005).

Sales and marketing integration. Kahn and Troilo define marketing and sales integration as the degree to which there is interaction and collaboration between marketing and sales units (Troilo, De Luca, & Guenzi, 2009). Sales and marketing integration can be defined as the extent to which the activities carried out by the two functions are supportive of each other and the realization of each others' goals and objectives in a coordinated, synchronized or thoughtfully sequenced manner (Guenzi & Troilo, 2006; Lyus et al., 2011; Rouziès et al., 2005).

According to Kotler et al. (2006), when sales and marketing are fully integrated, boundaries become blurred. Both groups redesign the relationship to share structures, systems, and rewards. Marketing and sales begin to focus on strategic, forward thinking types of tasks. Marketers are deeply embedded in the management of key accounts. The two groups develop and implement shared metrics. Budgeting becomes more flexible and less contentious. A 'rise or fall together' culture develops (Kotler et al., 2006).

Marketing

The American Marketing Association defines marketing as the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large (American Marketing Association, 2016).

Organization

An organization is defined as a company, business, club, etc. formed for a particular purpose (*Merriam-Webster, 2004*). Although many academic authors use the term 'firm', defined as a business organization, such as a corporation, limited liability company or partnership, that sells goods or services to make a profit (*Investopedia, 2016*), this researcher believes the term 'firm' is too limiting, in that it references the need to sell goods and make a profit. The term 'organization', which is used in this paper, is much more encompassing and can be applied to companies, corporations, and other businesses intending to make a profit, and to non-profit organizations and other entities that may employ marketing and sales, for which integration is also a key consideration and potential driver of success.

Sales

Businessdictionary.com (2016) defines sales as the activity or business of selling products or services. Sales is the personal or impersonal process where the sales person ascertains, activates, and satisfies the needs of the buyer to the mutual, continuous benefit of both buyer and seller (Oliva, 2006).

Parameters and Delimitations of the Study

Parameters of the Literature Review

The intent of this research is to provide a review of the literature published on marketing and sales integration. However, this topic is just beginning to be explored by academic researchers, resulting in few articles published (to date) specifically referencing the integration of marketing and sales. Consequently, the literature search was expanded to include words related to integration including coordination, collaboration, and interaction. Needing to expand the parameters even further to provide an appropriate framework, marketing's relationship with functions other than sales (e.g., engineering, research and development, and finance) was searched using the same terms listed above.

Expert Deliminators

For the parameters of this research study, experts were defined as practitioners who have a minimum of 30 years experience in marketing, sales, and/or customer relationship management; having held senior level positions in organizations.

Limitations and Assumptions of Delphi Methodology

The most commonly cited limitations of Delphi include: expertise, consensus, participation/attrition, researcher bias, and that it is time consuming (Clayton, 1997; Murry Jr & Hammons, 1995; Williams & Webb, 1994). Although it is relatively time consuming and open to researcher distortion, these criticisms could be leveled at similar qualitative and quantitative methods (Williams & Webb, 1994).

Expertise

There is no agreed upon criteria for defining/determining ‘experts’ for the Delphi technique. Many critics have considered the lack of definition of expertise as a limitation of this methodology, having a negative impact on reliability and validity. Expertise, however, is the desired goal for sample selection and it is this feature which sets Delphi apart from other general forms of survey research (Clayton, 1997). It is well acknowledged and socially validated the concept of 'expert' or 'expertise' is both a social and scientific phenomenon. Expertise exists in various forms and, although it may be difficult to measure exactly with reliability and validity, there are general characteristics of individuals who, in a given context, demonstrate a level of wisdom, insight, theory, practice, experience and analysis not found common to all individuals. It is these individuals to whom the term 'expert' is assigned. It is reasonable, therefore, to seek individuals whose peers regard them in this light (Clayton, 1997). Expert implies the individual participant has more knowledge about the subject matter than most people, or they possess certain work experience, or are members in a relevant professional association (Hill & Fowles, 1975). Experts by definition are credible, influential sources, with high levels of knowledge (often combined with experience) on a given topic. Their broad-based influence may span a wide variety of industries, disciplines, practices, and geographic boundaries. Delphi participants bring a wide range of direct knowledge and experience to the decision-making processes (Powell, 2003). Most Delphi users suggest experts should be chosen for their work in the appropriate area and credibility with the target audience (Powell, 2003).

Consensus

Although the level of consensus required for a valid Delphi study is often debated, modified Delphi suggests procedures can stop after either consensus or stability of responses has been achieved (Murry Jr & Hammons, 1995). Others suggest minimal amount of disagreement is all that is required. Stability or convergence is reached when, it becomes apparent little, if any, further shifting of positions will occur (Murry Jr & Hammons, 1995). The researcher must decide when to stop collecting data and what the definition of `consensus' is in relation to the study's findings (Williams & Webb 1994). According to Gupta and Clarke (1996), Delphi's goal is NOT to elicit a single answer or to arrive at a consensus; but to obtain as many high-quality responses and opinions as possible on a given issue(s), from a panel of experts, to enhance decision making.

Participation and Attrition

True experts have great insight into their field; unfortunately, they are often very busy and may not be able to participate fully in Delphi studies (Skulmoski et al., 2007)**.** With up to four rounds of questionnaires, the Delphi technique asks much more of respondents than a simple survey, and the potential for low responses increases exponentially (Keeney, Hasson, & McKenna, 2006). In addition, lack of motivation to fully participate may lead to sample attrition (Murry Jr & Hammons, 1995). Therefore, purposive sampling is usually necessary because the study could easily require participants spend from 30 minutes to two hours each round. Attrition rates may alter the range of opinion from round to round, thereby impacting consensus rates (Williams & Webb, 1994).

According to Keeney et al. (2005), to enhance responses in each round, it is critical participants realize and feel they are partners in the study and are interested (if not fascinated) by the topic. Engaging, concise, and well-written questions encourage interest, ownership, and active participation (Skulmoski et al., 2007).

Establishing relationships with the participants, although time consuming, could increase commitment to the study and enhance response rates. In an effort to build relationships with participants, the researcher should clearly communicate the purpose of the study as well as the value of the participants' expertise and the need they fulfill. And finally, although time intensive, the researcher should engage in personal (ideally face-to-face) communication with the researcher. McKenna found it was more advantageous to employ face-to-face interviews in the first round as this helped to increase the response rates in that and subsequent rounds (Hasson, Keeney, & McKenna, 2000). Although direct contact with the participants is time consuming, the nature of this contact can affect the results obtained (Hasson et al., 2000).

Developing and nurturing a relationship is necessary to increase the likelihood of participants' ongoing commitment (Keeney et al., 2006). Interviewers can show appreciation for valuable information, and respondents may be gratified to be an object of interest and by having an audience. Gaining the commitment of the panel and providing information on how the study will be implemented should ensure respondents feel sufficient ownership (Keeney et al., 2006).

Assumptions

All of the experts have extensive experience in sales and/or marketing, and therefore an assumed interest in the topic of integrating marketing and sales, helping to ensure their participation throughout the entire study.

Researcher Bias

Although the researcher has worked as a marketing executive for 30 years, to limit researcher bias, practices for integrating marketing and sales were identified through a thorough review of the literature. Experts were then asked to determine best practices for integrating marketing and sales, guided by an initial questionnaire informed by the literature.

Selection and Motivation of Exert Participation for Study

Executives who have a minimum of 30 years of organizational experience in marketing, sales, and/or customer relationship management were selected as experts (Appendix B). To encourage participation, minimizing (and ideally avoiding) attrition, a purposeful sample was selected, with whom the researcher has established professional relationships. The purpose of the study, as well as the value of their expertise, was communicated to the experts while recruiting their participation.

In person interviews were conducted in the first round of the Delphi study, to engage experts and ensure participation. A questionnaire, developed from the literature search, based on a five point Likert scale, was used to guide the interviews in round one (Appendix E). Additional rounds were conducted via email until the responses stabilized and the least amount of disagreement was reached. This process was intended to be sensitive to time and scheduling demands of the experts, while simultaneously providing clarity and consistency in data collection; ensuring participation and minimizing attrition.

Significance of Study

According to Athens (2001), the expectation is that sales and marketing are aligned in successful organizations - yet, the opposite is often true; they need to synch up or sink. The two need to be integrated to build customer relationships, enhance brand, capitalize on leads, improve market share, and boost revenue (Athens, 2001).

The Problem: Lack of Integration Between Marketing and Sales Impacts Organizational Success

Lack of alignment between marketing and sales hurts corporate performance (Kotler et al., 2006). According to Le Meunier-FitzHugh and Piercy (2007), there is some consensus that poor collaboration between sales and marketing may have a detrimental effect on business performance, where effective collaboration should improve business performance. A lack of cooperation between sales and marketing has the potential to damage the overall success of the organization (Madhani, 2015). The sales and marketing relationship is fraught with problems and results in costly acquisition of accounts, ineffective marketing expenditures, and inefficient operations (Atteya, 2012). Focusing on core competencies places marketing at the center of the integration of business functions and disciplines (Borders, 2006). If marketing and sales do not cooperate, the company's strategy will be inconsistent and weak; and execution will be flawed and inefficient (Shapiro, 2002).

When marketing and sales are not integrated and the relationship is undefined, the two groups have frequent conflicts and compete over resources. Efforts are duplicated and tasks fall between the cracks (Kotler et al., 2006). When the marketing and sales relationship is undefined, sales and marketing have grown independently; each is preoccupied largely with its own tasks and agendas. Marketing and sales managers interviewed by Matthyssens and Johnston (2006) reported a task is sometimes done twice; neither group knowing much about what the other is up to—until a conflict arises.

Poor coordination between sales and marketing teams raises market-entry costs, lengthens sales cycles, and increases cost of sales (Kotler et al., 2006). The absence of cross-functional integration may result in promises made by the organization's marketing department that have not been coordinated with sales, marketing promotions that are not synchronized with sales delivery schedules, and failure to deliver product by an organization in a specific requested format because it is not the most efficient (Madhani, 2015).

Bad experiences in marketing and sales can damage several potential relationships and erode customer currency (Peppers, 2008). Le Meunier-FitzHugh and Piercy (2007a) cited a 1988 article by Tjosvold who found ineffective interaction between sales and marketing resulted in dissatisfied customers and lost business (Tjosvold, 1988a). Lack of integration between sales and marketing resulted in loss of customer satisfaction, trust, and loyalty, as well as deterioration of customer relationships (Madhani, 2015).

Marketing and Sales Need to be Integrated in Organizations

Marketing relies on sales to deliver the marketing message externally and collect valuable customer information (Colletti & Chonko, 1997). Both sales and marketing have the ultimate goal of selling products and services. Sales functions are frequently dependent on marketing activities to provide a consistent supply of prospective customers through their promotional activities (Yandle & Blythe, 2000). Logically, sales and marketing functions should be working symbiotically for the benefit of the organization (Le Meunier-FitzHugh & Piercy, 2007a).

Kotler, Rackham, and Krishnaswamy (2006) recommend every company should improve the relationship between sales and marketing. Delivering a high level of performance requires a high level of sales and marketing integration (Rouziès et al., 2005). Organizations with integration seem to enjoy a constructive, harmonious marketing–sales interface. There is mutual respect, information is freely shared, and both functions are involved in each other's activities to increase the organization's overall performance (Biemans et al., 2010).

Benefits of Integrating Marketing and Sales in Organizations

When sales and marketing departments are able to forge stronger connections, organizations benefit (Malshe, 2011). There is a long-standing contention sales and marketing activities should be coordinated because their functions are interrelated (Munn, 1998). Sales and marketing integration is a dynamic process in which the two functional areas create more value for their organization by working together than they would by working in isolation (Rouziès et al., 2005). Sales and marketing integration is the extent to which activities carried out by the two functions are supportive of each other (Rouziès et al., 2005).

According to Dawes and Massey (2005), it may be advantageous for organizations to consider merging separate marketing and sales units to improve integration and decrease conflict. Merging the two functions would provide opportunities for marketing and sales to interact more frequently, better understand each other's professional domain, and work more effectively together on joint projects (Dawes & Massey, 2005). Kotler et al. (2006) suggest every company can and should improve the relationship between sales and marketing.

Marketing and sales functions are most valuable working together: understanding, creating, communicating, delivering, and profitably harvesting value (Oliva, 2006). They need to be integrated to build customer relationships, enhance brand, capitalize on leads, improve market share, and boost revenue (Athens, 2001). The main rationale for integrating the two functions is their common goals to generate profitability and increase revenue (Kotler et al., 2006). Collaboration between two groups leads to improved productivity, enhanced competence, and increased confidence in work relationships (Le Meunier-FitzHugh & Piercy, 2007a; Tjosvold, 1988b).

There are many benefits to integrating marketing and sales in organizations. Scholars have noted positive outcomes such as: increased efficiency and effectiveness (Madhani, 2015); improved business performance (Dewsnap & Jobber, 2000; Kotler et al., 2006; Le Meunier-FitzHugh & Piercy, 2007a; Rouziès et al., 2005; Shapiro, 2002); customer (Anderson & Sullivan, 1993; Guenzi & Troilo, 2006,2007; Madhani, 2015) and employee satisfaction (Guenzi & Troilo, 2006), to name a few.

Increased efficiency and effectiveness. The need to create value has increased demand for new conceptual models and indicators to determine successful measures of sales efficiency and marketing effectiveness (Madhani, 2015). Coordinating the sales and marketing can improve the effectiveness of activities undertaken by each functional area (Rouziès et al., 2005).

According to Madhani (2015), the major benefits of sales and marketing integration include enhanced return on investment; improvement in the top and bottom line; and an understanding of the efficiency and effectiveness of marketing communications promotions. Madhani (2015) claims effective sales and marketing integration has strong impact on productivity and profitability of organizations. Organizations with effective sales and marketing integration are more likely to know how well channel partners participated in promotion schemes and how customers responded to them; the marketing department is able to know if the marketing communication and promotion plan met their return on investment criteria and other objectives. The primary driving forces are cost reduction and revenue generation achieved by superior performance of various cross-functional sales and marketing drivers (Madhani, 2015). Improved alignment between the two functions [marketing and sales] fosters efficient decision making processes by means of heightened consistency and synergy (Guenzi & Troilo, 2006).

Business performance. Improvements in the relationship and the level of integration achieved between sales and marketing, provide many benefits in terms of improved business performance (Barki & Pinsonneault, 2005; Dewsnap & Jobber, 2000; Kotler et al., 2006; Le Meunier-Fitzhugh & Piercy, 2007b; Rouziès et al., 2005). Performance includes all things a company must do to win the competitive battle in its industry to attract, retain, and profitably serve customers (Shapiro, 2002). Sales and marketing integration is one of the organizational changes that will do the most to improve sales performance and is one of the most important issues facing sales and marketing managers (Rouziès et al., 2005). Empirical evidence suggests integration reduces costs, increases service quality, increases sales and revenue (Barki &

Pinsonneault, 2005). Kotler et al. (2006) suggested, creating the *right* relationship between sales and marketing reduces internecine squabbling, enabling former combatants to boost top *and* bottom line growth, together.

Sales and marketing integration is increasingly recognized as a key driver for improving financial and operating performance (Madhani, 2015; Shapiro, 2002). Sales and marketing interaction is important for overall performance and growth of business, as their productive relations is linked to improved productivity, competitiveness, superior value creation, and market performance (Tjosvold, 1988b). With sales and marketing collaboration, organizations outperform competition; create added value, as well as customer satisfaction (Madhani, 2015). Organizations that effectively integrate their sales and marketing activities are much more likely to achieve better corporate performance in terms of sales, profitability, market share and even customer satisfaction (Madhani, 2015). When sales and marketing work well together, companies see substantial improvement on important performance metrics: sales cycles are shorter, market-entry costs go down, and the cost of sales is lower (Kotler et al., 2006). In international surveys of senior executives from a wide range of business-to-business industries, sales and marketing integration was mentioned as one of the organizational changes that would do the most to improve sales performance and as one of the most important issues facing sales and marketing managers (Rouziès et al., 2005).

Le Meunier-FitzHugh and Lane (2009) established improvements in the relationship between sales and marketing have a direct and positive impact on business performance, as well as strengthening market orientation. Businesses with the greatest degree of alignment are growing faster, closing 38 percent more proposals, and losing 36 percent fewer customers to competitors (Peppers, 2008). Where senior managers succeed in improving cross-functional activities within the marketing function, organizations experience superior profit levels (Kotler et al., 2006).

Customer satisfaction. Integration of sales and marketing, and creation of superior customer value, will enhance customer satisfaction which provides competitive advantage to organizations (Guenzi & Troilo, 2007; Madhani, 2015). Customer satisfaction is an important driver of an organization's profitability; there is a positive influence of customer satisfaction on financial performance indicators, such as return on investment and return on assets (Anderson & Sullivan, 1993; Madhani, 2015). The sales and marketing interface has a direct and significant impact on customers and the revenue-earning potential of the organization (Madhani, 2015). Sales and marketing integration facilitates organizational ability to foster long-term relationships with customers based on customer satisfaction, trust, and loyalty (Madhani, 2015). In 2001, Fornell claimed, satisfied customers can be viewed as economic assets of the firm that yield future cash flows (Madhani, 2015).

Madhani (2015) suggests integration of sales and marketing can help organizations provide superior customer value by developing a mutual understanding of responsibilities, sharing ideas, information and resources, and working together as a team to resolve cross-functional problems of sales and marketing. Sales and marketing are highly connected; a prerequisite for better customer value propositions. Guenzi and Troilo (2006) suggest marketing and sales integration generates customer value by means of increased organizational citizenship. Organizational citizenship behavior, defined as voluntarily helping others with, or preventing the occurrence of, work-related problems, enhances customer satisfaction by stimulating constructive suggestions about how to improve a company's value proposition, citizenship behavior.

Employee satisfaction. Guenzi and Troilo (2006) showed integration between marketing and sales departments fosters the creation of an organizational climate typical of learning organizations, which are characterized by organic structures whose main features are: recognition of interdependence, information sharing, cooperation, and commitment. In addition, typical processes of market oriented companies, such as effective marketing intelligence dissemination and organizational responsiveness, have a positive impact on employee satisfaction (Guenzi & Troilo, 2006) (Figure 2).

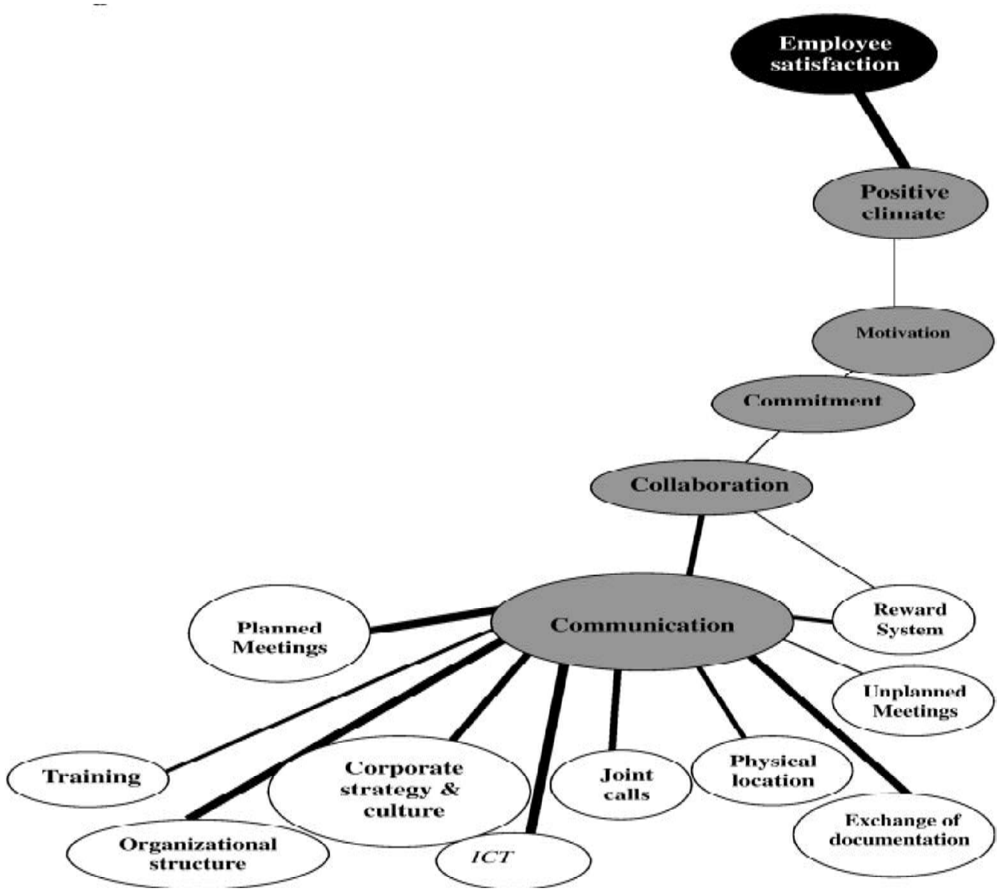


Figure 2. Positive impact of integration between marketing and sales on employee satisfaction (Guenzi & Troilo, 2006, figure 2d, p. 982).

Researcher's Perspective

As an experienced corporate marketing executive, the researcher brings a wealth of knowledge to this research study. With over 30 years of experience in various worldwide marketing roles, for more than 17 organizations, the researcher has led marketing as well as facilitated integration with sales forces. Consequently, the researcher has first-hand experience with the challenges of the conflicted marketing and sales relationship, as well as the benefits realized when marketing and sales are well integrated.

Based on the researcher's experience, there are several factors which contribute to dysfunctional relationships between marketing and sales including (but not limited to) poor communication, power struggles, culture, functional alignment, undefined roles and responsibilities, ineffective leadership, a tactical versus strategic visionary approach, lack of strategic planning and/or clearly defined goals and objectives, and lack of a customer focus.

At times, marketing is viewed as a resource, rather than a driver and/or partner. But it must be acknowledged this is often a result of marketing not taking the lead, stepping up to the plate, and being a strategic, value-added business partner; rather they act as a resource for sales and wait for requests to develop and deliver sales enablement tools. This behavior exacerbates the conflicted relationship and frustration between the two functions.

The researcher has successfully mitigated conflicted relationships, facilitating the integration of marketing and sales, through the implementation of a multitude of practices including (but not limited to): multidirectional communication, clarifying roles and responsibilities, developing and articulating a shared vision, fostering a focus on customers, as well as initiating joint strategic planning and shared performance metrics, to name a few.

Successful implementation of these practices, resulting in improved relationships and business performance, has been validated and documented for a multitude of organizations with whom the researcher has worked.

Summary

While professional marketing and sales practitioners have been placing blame on the 'other' function for years, scholars have just recently begun exploring this conflicted relationship, causes, and impact on organizational performance. Although there is a preponderance of evidence validating the need to integrate marketing and sales in organizations, as well as the value and benefits of doing so, academic research is barely scratching the surface. Academic literature to date is disparate, exploring such topics as: barriers to integration, marketing and sales interaction, collaboration, coordination, and more recently integration. It is evident a great deal of research is needed to further illuminate this business challenge.

Through a thorough review of literature and input from expert marketing and sales practitioners, it is the goal of this research study to add to the academic body of knowledge by determining best practices to integrate marketing and sales in organizations, which could ultimately lead to improved performance. As such, this paper is organized into four additional chapters: a literature review to clarify the contextual landscape of sales and marketing integration; a review of the methods used; an analysis and discussion of data collected; and a summary of contributions and implications for research.

CHAPTER 2: LITERATURE REVIEW

The intent of this chapter is to provide a review of the significant literature on marketing and sales integration. Literature on marketing and sales integration is scarce, and is primarily theoretical (Dewsnap & Jobber, 2000, 2002; Rouziès, Anderson, Kohli, Michaels, Weitz, & Zoltners, 2005).

Since the integration of marketing and sales is beginning to be explored by academic researchers, and little has been published to date, the literature search was expanded to include other key words related to integration including: coordination, collaboration, and interaction. Needing to expand the parameters further, to provide enough literature to review, marketing's relationship with functions other than sales was searched, using the same terms listed above. Previously the academic focus was more on marketing's interaction with other functions such as engineering, research and development, or finance (Madhani, 2015).

The research map (Figure 3) represents the literature search and review. Starting from the bottom of the figure, the dotted sphere represents the expanded literature search using related terms including integration, collaboration, coordination, and interaction. The solid ovals represent the cross functional relationships searched using the terms above, including: marketing and sales, and marketing and 'other' functions (e.g., manufacturing, research and development); with the primary focus being on marketing and sales integration, as indicated by the use of the color purple throughout the graphic. Although the literature was disparate, it was grouped as logically as feasible to provide the foundation for identifying practices for integrating marketing and sales. This resulted in discussing the following related topics as indicated: the value and benefits of integration as well as the impact of lack of integration (as covered in chapter one); barriers to integration; marketing and sales interaction (e.g., configurations, interfaces, and relationships); as well as marketing and sales integration (coordination/collaboration) (e.g., antecedents, activities, practices); leading to the identification of best practices for integrating marketing and sales, indicated in the purple oval at the top.

Several scholars have begun to explore interaction between marketing and sales addressing such topics as: relationships, interfaces, configurations, thought world differences, and integration relationship levels. Others are researching coordination and collaboration between marketing and sales. More recently research is on the concept of integrating marketing and sales (Table 1).

The most published scholars are Le Meneuier-FitzHugh and Piercy who research marketing and sales collaboration and coordination. Although their studies actually include data collected from organizations, of the 146 useable surveys they reference in their articles, only 33 respondents were sales and/or marketing practitioners.

Rouziès, et al. (2005) confirmed a major impediment to marketing and sales integration is created by the different mindsets of employees of the two functions. Dewsnap and Jobber (2002), and Rouziès et al. (2005) developed conceptual frameworks (Guenzi & Troilo, 2006). However, they did not empirically test the relationships between the existence of such impediments on marketing–sales integration, nor the impact of potentially beneficial antecedents on integration (Guenzi & Troilo, 2006). Other scholars (Dewsnap & Jobber, 2000; Fisher et al., 1997; Rouziès et al., 2005) claim some of the components of the integration construct highlighted by Kahn and colleagues – like information exchange, communication, teamwork, shared goals – play the role of antecedents to marketing–sales integration (Guenzi & Troilo, 2006). Surprisingly, a widely accepted definition and a measure of the integration construct are still eluding the literature (Guenzi & Troilo, 2006; Rouziès et al., 2005).

Table 1.
Authors and Number of Articles Published on Marketing and Sales Integration and Related Topics

Marketing & Sales					
Interfaces	**#**	**Coordination/Collaboration**	**#**	**Integration**	**#**
Atteya	1	Cespedes	1	Dewsnap & Jobber	1
Avlonitis	1	Ingram	1	Guenzi & Troilo	2
Beverland et. al.	1	LeMeunier-FitzHugh & Piercy	11	Lyus et al.	1
Biemens & Brencic	4	Lyus et al.	1	Madhani	2
Dawes & Massey	5	Malshe et al.	2*	Massey & Dawes	1
Dewsnap & Jobber	1	Matthyssens & Johnston	1	Rouzies et al.	1
Homburg & Jensen	2	Strahle & Spiro	1		
Kotler	2				
Krol	1				
Malshe et al.	5				
Matthyssens & Johnston	1				
Oliva	1				
Watkins	1				
Total	*(25)*		*(19)*		*(9)*
**Also published a book*					

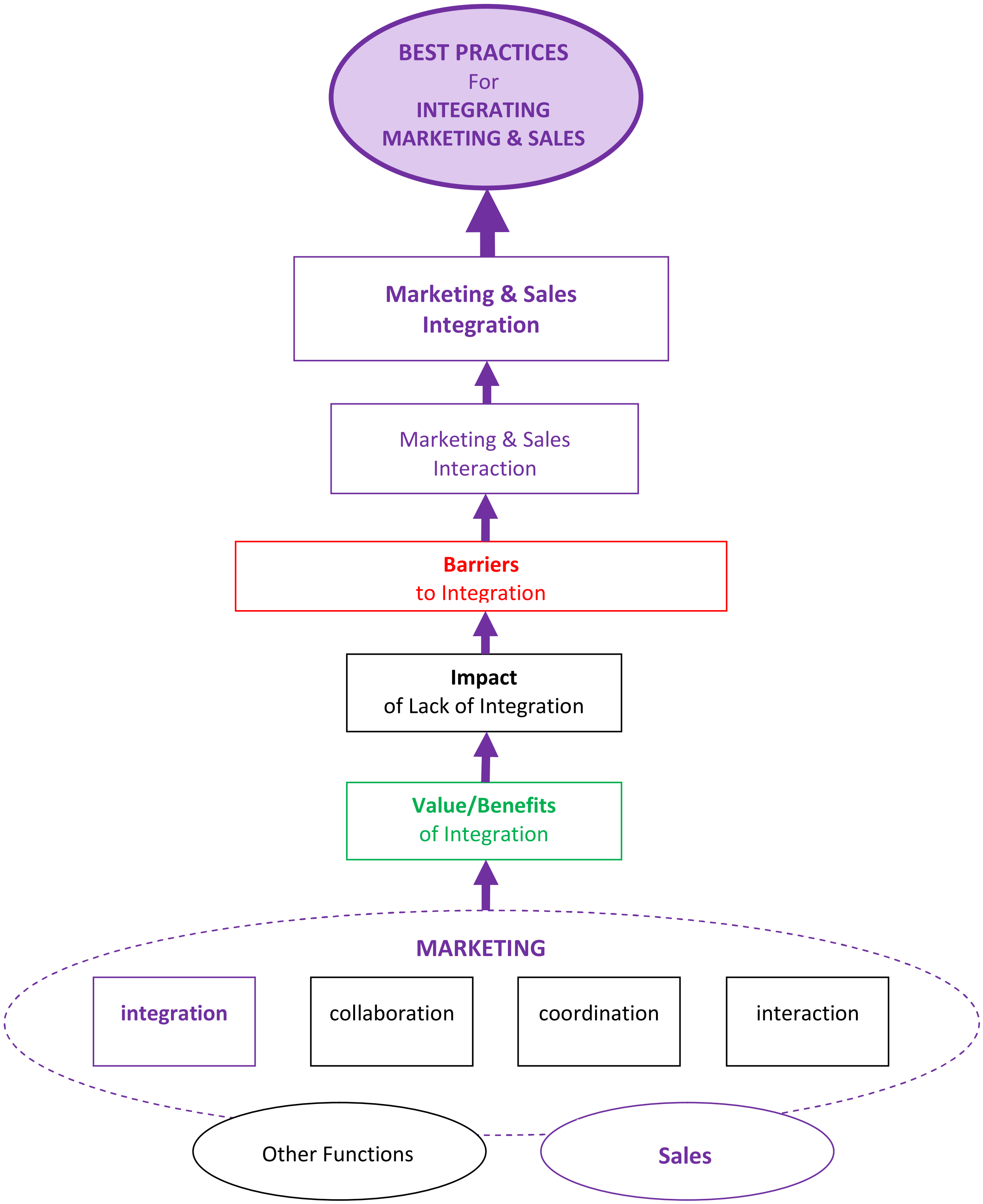


Figure 3. Overview of marketing and sales integration literature search process and content reviewed.

Barriers to Integration

Extant literature indicates attempts to integrate marketing and sales have been faced with many obstacles (Lorge, 1999). Researchers have attributed the friction, animosity, and mutual lack of respect between marketing and sales to various factors such as: conflict; role ambiguity; stereotypes, individual characteristics, and thought world differences of marketing and sales; credibility; culture; departmental structures and physical separation; poor communication; lack of shared vision and customer focus; differences in strategic planning, goals and objectives; incongruent performance metrics, rewards and compensation; issues with gathering and disseminating organizational knowledge and intelligence; lead generation issues; as well as a lack of inter-functional integration (Figure 4). Organizations must work on organizational (e.g., merging sales and marketing units) and individual levels (e.g., decreasing psychological distances between marketing and sales personnel) in order to reduce such conflict (Dawes & Massey, 2005).

Figure 4. Barriers which inhibit marketing and sales integration.

It is plausible the two functions may not always conflict openly with one another. Yandle and Blythe (2000) indicate the conflict between sales and marketing is primarily generated by reciprocal interdependency and frequently senior managers believe sales and marketing are working well together, even when they are experiencing difficulties.

Many subtle differences between the two may work against integration efforts. Lack of clear role definition (Kotler, Rackham, & Krishnaswamy, 2006) or alignment over objectives (Strahle, Spiro, & Acito, 1996) may cause subtle acrimony. Organizations may encounter challenges such as cultural mismatch between sales and marketing (Beverland, Steel, & Dapiran, 2006). Cultural divide may enhance thought world and competence differences (Homburg & Jensen, 2007). When these two functions do not get along well and are not effectively integrated, it may affect many strategic outcomes (Dawes & Massey, 2005). According to Matthyssens and Johnston (2006), there are various reasons why marketing and sales departments do not integrate as they should. The most important barriers are the stereotypes of marketing and sales practitioners, the unilateral dependence relations, the different "hierarchy of priorities", and a number of organization and communication factors (Matthyssens & Johnston, 2006).

A wide range of structural, strategic, or political barriers can hinder the integration of different organizational components (Barki & Pinsonneault, 2005). Physical separation and differences between sales and marketing personnel in their windows on the world (Cespedes & Piercy, 1996; Homburg & Jensen, 2007) may create a challenge for appreciating how (and whether) their counterparts' activities contribute to the broader strategic process and their own success (Rouziès, et al., 2005). Sales people often view marketers as being ensconced in ivory towers and out of touch with reality (Beverland et al., 2006; Homburg, Jensen, & Krohmer, 2008; Lorge, 1999). This raises questions in their minds about marketers' credibility as strategy creators and in many instances sales then ignores marketing initiatives (Aberdeen, 2002; Malshe, 2010; Strahle et al., 1996). There have been examples of sales and marketing teams blaming each other for sales failure (Colletti & Chonko, 1997; Kotler et al., 2006; Shapiro, 2002).

Extant research on the interface indicates often, sales and marketing do not share a cordial relationship, and conflict, non-cooperation, and mutual negative stereotyping afflict this interface (Dewsnap & Jobber, 2000, 2002; Montgomery & Webster, 1997). Studies considering the cross-functional relationship have suggested this interface exhibits many negative characteristics (Dawes & Massey, 2006; Dewsnap & Jobber, 2000; Kotler et al., 2006; Piercy, 2006; Rouziès et al., 2005). There are many reasons cited for the lack of cooperation and collaboration including: very different philosophies; individuals with different backgrounds (e.g., education and experience), physical separation, and poor communication (Dawes & Massey, 2005; Dewsnap & Jobber, 2000; Yandle & Blythe, 2000; Lorge, 1999; Ruekert & Walker Jr, 1987).

Malshe and Biemans (2015) classify the root causes of ineffective sales-marketing and relationships into five categories: 1) different organizational sub-cultures; 2) different individual backgrounds; 3) sub-optimal organizational structure; 4) lack of joint activities and interaction; and 5) misaligned systems and processes (Table 2).

Table 2.

Causes of Dysfunctional Sales-Marketing Interfaces (Malshe & Biemans, 2015, figure 3.2, p. 67)

<table>
<tr><th>Differences in Organizational Sub-Cultures</th><th>Different Individual Backgrounds</th><th>Sub-Optimal Organizational Structure</th><th>Lacks of Joint Activities and Interaction</th><th>Misaligned systems and processes</th></tr>
<tr>
<td>• Scope & focus of activities
• Time horizons
• Sources of knowledge
• Relationship to firm environment
• Objectives & priorities
• Language</td>
<td>• Personalities
• Cultural backgrounds
• Training
• Firm & industry experience</td>
<td>• Functional organization of sales & marketing functions: product vs market-based structures
• Geographical distance between sales & marketing: co-location</td>
<td>• Joint tasks, performed by sales & marketing
• Joint non-tasks, social activities
• Involvement in each other's tasks
• Bi-directional interaction & communication</td>
<td>• Out of sync processes
• Lack of common vision
• Separate information systems
• Lack of management support for the sales-marketing interface
• Misaligned metrics and incentives</td>
</tr>
<tr><th colspan="5">Different Sales-Marketing Configurations</th></tr>
<tr><td colspan="5">The sales-marketing configurations (hidden marketing, sales-driven marketing, living apart together, aligned sales-marketing) influences:
• Nature of the sales-marketing interface
• Likelihood of problems in the sales-marketing interface
• Nature of the appropriate solutions</td></tr>
</table>

Conflict

Conflict involves the interdependence of two parties and arises when the first party interferes or put barriers and obstacles in the way of the second party when they try to achieve their tasks and objectives. There are two types of conflict: task and emotional. Task conflict focuses on systematic disagreement when achieving tasks, while emotional conflict involves friction among people (Atteya, 2012). Le Meunier-FitzHugh and Piercy (2007a) defined interdepartmental conflict as working at cross-purposes, having incompatible goals, being obstructive, and not appreciating each other's roles.

Some scholars have claimed organizational conflict tends to hinder organizational performance and should be avoided. Other scholars view conflict as functional, if managed properly. They argue conflict has an important role in optimizing organizational performance through developing critical evaluation, which decreases the groupthink phenomenon by increasing thoughtful consideration of criticism and alternative solutions (Atteya, 2012).

Marked interdepartmental conflict between sales and marketing obstructs the development of a collaborative relationship (Dawes & Massey, 2005; Dewsnap & Jobber, 2002; Ruekert & Walker Jr, 1987). High levels of conflict affect the level of performance in both functions (Atteya, 2012). An imbalance in the power relationships between functional areas, particularly between marketing and sales, may result in inter-functional conflict (Massey & Dawes, 2007); potentially causing a reduction in teamwork, increasing distrust, and an eventual withdrawal from the relationship (Le Meunier-FitzHugh & Piercy, 2011).

Inter-functional conflict. Inter-functional conflict can be defined as working at cross-purposes, being obstructive, and not appreciating each other's roles. Sales and marketing do not always act collaboratively to the benefit of the organization (Le Meunier-FitzHugh & Piercy, 2007a). The Aberdeen Group (2002) found sales staff repeatedly complain support tools provided by marketing are inadequate, and marketing frequently accuses sales of misunderstanding or misusing marketing collateral. Both sales and marketing may be following their own agendas, creating conflict, poor coordination, and destructive tension between the two groups (Arthur, 2002). These issues characterize the interface between sales and marketing and may lead to conflict detrimental to collaboration (Dawes & Massey, 2005; Le Meunier-FitzHugh & Piercy, 2010)

Frequently, sales and marketing have developed mutual negative stereotyping, distrust, and non-cooperation based on the strength of their group identities and goal conflict (Dewsnap

& Jobber, 2002). Madhani (2015) attributed conflict between marketing and sales to separate identity, communication flow, goal differences, and conflicting time-frames.

Role Ambiguity

The lack of role clarity is seen as a barrier to integration (Gupta, Raj, & Wilemon, 1985). Role clarity can be broadly viewed as the absence of uncertainty about role definition, responsibilities, and tasks (Singh, 1993; Troilo, De Luca, & Guenzi, 2009). Troilo et al. (2009) define marketing and sales functional role clarity as the extent to which roles, goals, and responsibilities of the marketing and sales units are clearly defined. Many organizations do not have a clear idea how sales and marketing should relate (Krol, 2003), and critically, there is some doubt that sales and marketing personnel always appreciate the need to work together.

Some sales and marketing departments experience role ambiguity, and a lack of understanding of each others' roles (Cespedes, 1993; Dawes & Massey, 2005; Kotler et al., 2006). Marketing and sales often misunderstand and under-value each others' contributions (Kotler et al., 2006; Lyus, Rogers, & Simms, 2011). Many marketing staff do not understand the role or function of sales (Cespedes, 1993). Marketing believes the sales force is myopic—too focused on individual customer experiences, insufficiently aware of the larger market, and blind to the future (Kotler et al., 2006). Sales departments tend to believe marketers are out of touch with what is really going on with customers (Kotler et al., 2006). Many sales staff may regard marketing as being a support tool for the 'real business of selling', seeing themselves as bringing in new business and providing everyone in the organization with employment and income (Colletti & Chonko, 1997; Yandle & Blythe, 2000).

One of the fundamental components of role ambiguity is the unpredictability of the consequences of decisions and actions (Troilo et al., 2009). In 1981, Pearce theorized unpredictability increases when consequences of decisions are mediated by intentions and behaviors of others, and when feedback or information about those consequences are delayed or absent (Troilo et al., 2009). Marketing and sales have to rely on each other's intentions and behaviors to make sense of the consequences of their contribution (Cespedes, 1993; Strahle et al., 1996; Troilo et al., 2009).

Studies on marketing and sales role clarity highlight negative effects of lack of clarity on different levels of organizational performance. Cespedes (1993) avers a lack of functional clarity leads to dysfunctional conflict between the two functions, and, in turn, to limited effectiveness of decision making. When two or more departments share influence over the same decision, the ambiguity about their roles and contributions in shaping the decision's outcomes increases (Cespedes, 1993). Matthyssens and Johnston (2006) report a lack of clarity about marketing and sales responsibilities and roles reduces decisional efficiency by fostering late execution or repetition of certain activities, reducing the speed of actions in the market (Troilo et al., 2009).

Marketing and Sales Stereotypes

While strongly interdependent, the marketing-sales relationship is reported as being neither particularly collaborative nor harmonious (Dewsnap & Jobber, 2002). Dewsnap and Jobber (2002) cite multiple authors stating the relationship [between marketing and sales] is characterized by a lack of cohesion, poor coordination, conflict, non-cooperation, distrust, dissatisfaction, and mutual negative stereotyping.

Marketing and sales people are often fundamentally different, as to motivation; and what energizes and de-energizes them. Sometimes they think with different sides of their brains. Being fundamentally aware there is diversity across the two teams in finding ways to link together to mobilize that diversity – rather than get hung up on it – is characteristic of a "well-oiled" marketing and sales practice (Oliva, 2006).

Some researchers claim sales primarily focuses on relationships, and tactical and short-term objectives such as revenue targets (Cespedes, 1993; Madhani, 2015); while marketing is highly analytical, data oriented, long-term focused and believes in building competitive advantage for the future, and mainly adopts a strategic long-term perspective such as brand building. Other researchers have highlighted difficulties created by the short-term orientation of sales goals conflicting with the long-term orientation of marketing (Madhani, 2015; Montgomery & Webster, 1997). It has been claimed that marketing is product focused and long-term focused, where sales is customer focused and short-term focused (Cespedes, 1993; Homburg, Jensen, & Krohmer, 2008).

According to Malshe (2015), interactions between marketing and sales leave a lot to be desired in most companies. When sales and marketing fail to communicate effectively, and if they work at cross-purposes, it leads to a dysfunctional interface and results in inefficiencies and missed opportunities (Malshe, 2015). Malshe classifies the host of problems companies with dysfunctional sales-marketing experience from the perspective of: sales, marketing, the sales-marketing interface, and the company (Figure 5).

Both marketing and sales serve customers; with marketing focusing on facilitating and equipping sales people and building consistent brand images in the marketplace, and sales performing operational tasks such as contacting customers and closing the sale (Biemans & Brenčič, 2007; Biemans, Brenčič, & Malshe, 2010; Matthyssens & Johnston, 2006; Rouziès et al., 2005).

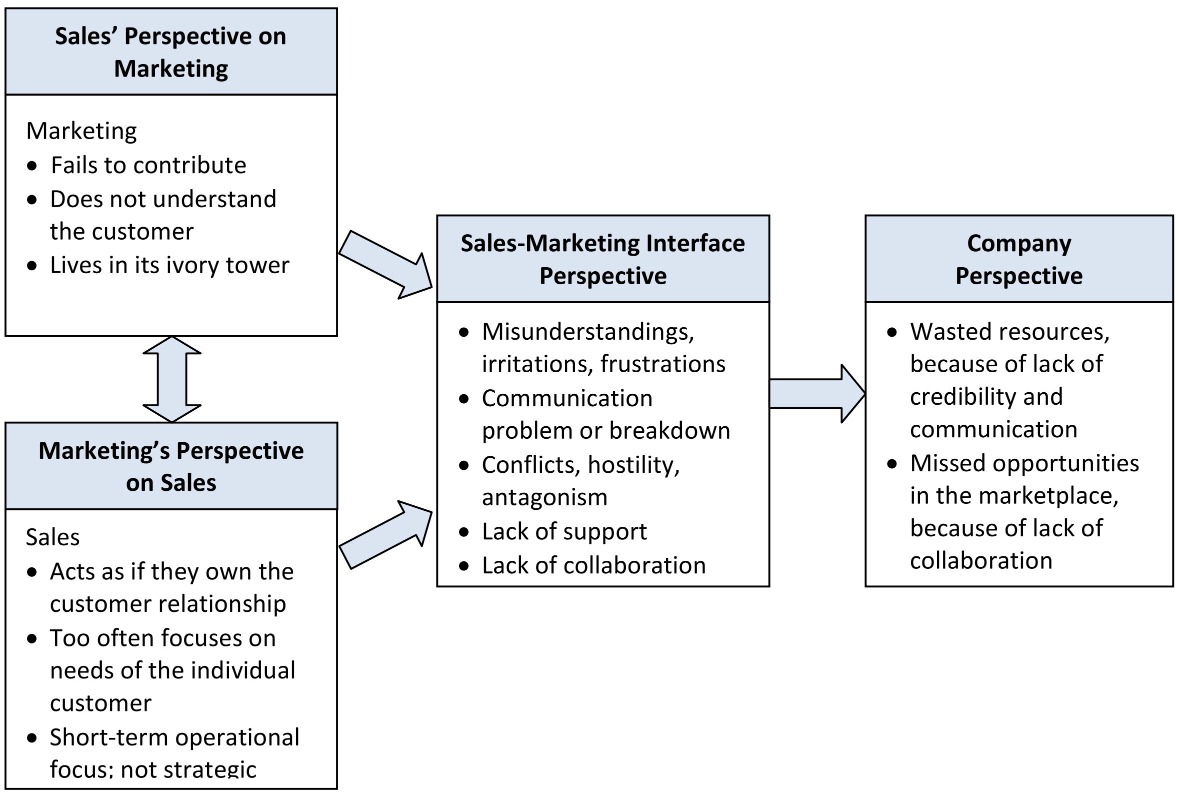


Figure 5. Classification of sales-marketing interface problems (Malshe, 2015, figure 3.1, p. 60).

Marketing characteristics. Marketing is often perceived as more 'button-downed', idealizing a more sophisticated, centralized approach (Shapiro, 2002), concentrating on building long-term relationships and competitive advantage that might take years to realize (Rouziès et al., 2005). From sales' point of view, many marketing led actions lack credibility, as they are often not explained nor consistent with their [own] past experiences (Beverland, Steel, &

Dapiran, 2006). Marketing's lack of customer contact is a serious problem which affects sales' perceptions of the credibility of marketing and much of the information they handed down to them, given that it often contradicts their direct experience (Beverland et al., 2006).

Sales sees marketing generally as being untrusting, in particular in regard to sharing information or in involving sales people with strategy development; which sales people see as important because they believe execution of marketing strategy is dependent on them forming relationships directly with customers (Beverland et al., 2006).

Sales characteristics. Selling is a professional exercise in showing how products or services serve individual self-interests of buyers (Oliva, 2006). Sales people perceive themselves generating income and question the value of an expensive marketing department (Biemans & Brenčič, 2007).

Overwhelmingly, marketing views sales as being effective in a very small area–selling; possessing very minimal knowledge of marketing (Beverland et al., 2006). Marketing believes sales' concern for the customer often comes at the expense of the big picture (Beverland et al., 2006). Due to incentives for sales people and their results orientation, they often tend to be more short-term-oriented than marketers, focusing on month-to-month and quarter-to-quarter sales (Rouziès et al., 2005). Typically the sales force consists of more independent, free-spirited people who idealize a 'fighter-pilot' mentality (Shapiro, 2002).

Sales people feel isolated from marketing, lack social interaction with marketers, and are not given the information they need (Beverland et al., 2006). A common complaint by sales people is they have little direct input into strategy formation (Beverland et al., 2006). In a 2007 study on differing thought worlds of marketing and sales, Homburg and Jensen confirmed different orientations, as well as different competencies, of marketing and sales adversely affect the quality of cooperation (Homburg & Jensen, 2007).

According to Shapiro (2006), marketing and sales should not be the same [type of individual], because the functions they perform require important differences. Marketing and sales personnel often have different training and work experiences and little understanding of how the other operates, resulting in resentment on both sides (Dawes & Massey, 2005). However, their work can be complementary and operate in a way that customers are efficiently and effectively acquired, developed, serviced, and retained (Shapiro, 2002).

Sales people continue to harbor prejudice, disrespect, and distrust about marketers and do not look up to them to provide consistent strategic direction (Yandle & Blythe, 2000); thereby disregarding many marketing initiatives (Strahle et al., 1996) since they do not perceive their marketing colleagues as credible partners (Malshe, 2010).

Credibility

Credibility refers to whether the receiver views the source of information as believable. Credibility construct consists of cognitive and affective dimensions; with the former referring to the source's perceived expertise, while the latter representing perceived trustworthiness in the eyes of the recipient. Trustworthiness and expertise are two important components of credibility (Malshe, 2010). Interpersonal proximity (between sales and marketing) is a third component of credibility. Proximity refers to whether marketers and sales people are able to establish and nurture personal rapport based on appreciation of each other's work (Malshe, 2010).

There is reason to believe sales people's unfavorable credibility assessment of their marketing colleagues may be the root cause of overt problems; sales people do not perceive marketers as credible (Malshe, 2010). According to Malshe (2010), if marketers repeatedly break promises, or treat sales people indifferently, they are likely to lose credibility. Sales people interpret marketers' trustworthiness in terms of whether they can depend on marketers to keep promises. Sales people emphasize nothing hurts marketers' credibility more than when they do not keep promises (Malshe, 2010).

Trust. Dawes and Massey (2006) describe two types of trust in their study of marketing and sales relationship effectiveness: cognition-based trust and affect-based trust. Cognition-based trust derives from a person's rational bases for trusting another person; for example, previous occasions in which the other person has been competent, reliable, and dependable. In contrast, affect-based trust is typified by emotional bonds between individuals, in which one party exhibits genuine concern and care for the welfare of the other person. Greater interdependence will lead to greater trust in relationship partners (Dawes & Massey, 2006). Trust between interdependent actors is a determining factor in achieving coordinated action and effectiveness (Dawes & Massey, 2006). In marketing channels literature, trust is considered an important contributor to effective relationships (Dawes & Massey, 2006). Business literature has interpreted trust as confidence in an exchange partner's reliability and integrity; a combination of dependability, competence, integrity, and responsiveness (Malshe, 2010).

Culture

Cultural differences are a primary source of friction between sales and marketing (Beverland et al., 2006; Hughes, Bon, & Malshe, 2012). Culture is defined as a pattern of shared values and beliefs that help individuals understand organizational functioning and provides norms for behavior in the organization (Beverland et al., 2006). Sales and marketing appear to have some cultural resistance to working together (Dawes & Massey, 2005; Dewsnap & Jobber, 2002) created by acquisition of specialized knowledge and skills linked to functional identities (Van Der Vegt & Bunderson, 2005). Difficulties in the interface may result from the groups holding different philosophies and employing individuals with different backgrounds (e.g., education and experience). These elements may create different cultures within the two groups (Beverland et al., 2006).

When both sales and marketing operate in a vacuum, it is a result of a company's structure and culture. Their organization has designed their departments, responsibilities, access to customer information, and reward systems to function separately. When priorities are misaligned, teams are too (Peppers, 2008). Kotler et al. (2006) posited there are two sources of friction between sales and marketing. One is economic and the other is cultural. The cultural conflict between sales and marketing is, if anything, even more entrenched than the economic conflict. This is true in part because the two functions attract different types of people who spend their time in very different ways (Kotler et al., 2006) (Figure 6).

Marketing and sales cultural divide. Informants in a study by Malshe and Sohi (2009) referred to a cultural divide between sales and marketing in terms of differences in short-versus long-term orientation, strategic versus tactical focus, or focus on philosophy versus field reality. Informants said such a divide between sales and marketing functions was inevitable.

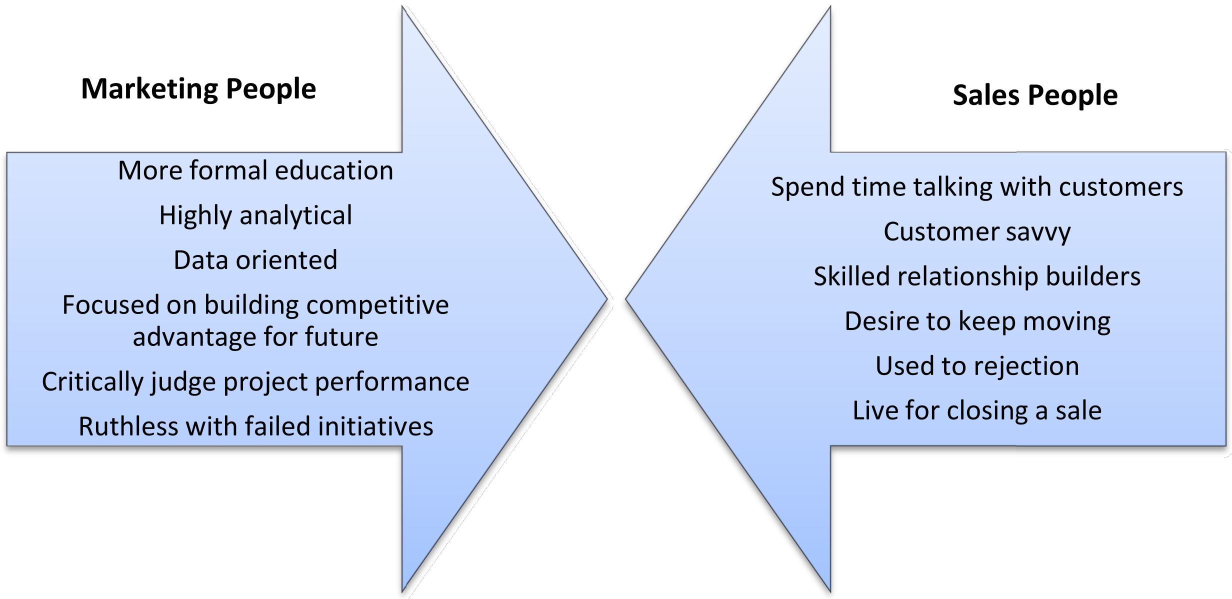


Figure 6. Typical characteristics of marketing and sales people which cause cultural conflicts (Kotler et al., 2006).

The differences in culture and perceptions may be because most sales teams work away from a central location, which leads to the sales groups bonding tightly, often excluding links with office personnel, which can lead to difficulties in communication (Le Meunier-Fitzhugh & Piercy, 2007b). Additionally, marketing's performance focus does not always look like action to their sales colleagues because it often happens behind a desk rather than out in the field (Kotler et al., 2006). Physical separation can aggravate the culture clash between the two groups and may lead to accusations of encroachment on each other's territory (Colletti & Chonko, 1997).

Sales and marketing have a history of poor cooperation (Le Meunier-FitzHugh & Piercy, 2007a) and may operate at a sub-optimal level due to deeply embedded cultural paradigms (Beverland et al., 2006). There is a call for senior managers to remove barriers between these two functions (Beverland et al., 2006).

Structure

While there are many configurations of marketing and sales in organizations, (interestingly) academic literature indicates historically sales is (and has been) a subset of marketing throughout European countries, and typically even refer to the relationship as ‘marketing and sales’. However, it is more common throughout the United States to refer to ‘sales and marketing’, where there is not a ‘typical’ and/or ‘historic’ configuration. Size of the organization, as well as industry, seem to be key indicators determining the marketing and sales structural interface as well as roles and responsibilities for each.

Whether sales and marketing should be structured separately or as joint departments is debated intensely (Dawes & Massey, 2005; Le Meunier-FitzHugh & Piercy, 2008; Rouziès et al., 2005; Shapiro, 2002). Many organizations do not have a clear idea how sales and marketing should interact and relate (Krol, 2003).

According to Le Meunier-Fitzhugh and Piercy (2008), sales and marketing are frequently structured as two separate departments. Problems arise with the interface when large, separate departments are independent silos that do not operate well together (Dawes & Massey, 2005; Dewsnap & Jobber, 2000; Kotler et al., 2006; Madhani, 2015; Rouziès et al., 2005). The disadvantage of this vertical hierarchy is that functions are prone to concentrate on their own activities and meet their own objectives, not talking to each other in a systematic way (Le Meunier-FitzHugh & Piercy, 2008). If marketing and sales are organizationally separate, so there is no dialog across these two functions on how the sales force is compensated, the results are disappointing. Marketing investments show no “uptake” from the sales force, and the sales people will perceive marketers as fundamentally disconnected from their day-to-day lives (Oliva, 2006).

Sales and marketing structure may have substantial effects on business performance, through cost efficiencies, service improvements and the creation of customer satisfaction (Le Meunier-FitzHugh & Piercy, 2008). Viswanathan and Olson (1992) maintain that because there is typically a physical separation between sales personnel and company headquarters, there may be problems with communication and collaboration. Griffin and Hauser (1996) suggested, “Separation decreases chance meetings, serendipitous information transfer, or problem clarification in the halls, or around the coffee machine. Long distances between groups make face-to-face communication inconvenient, leading to decision-making delays'' (p. 197).

Poor Communication

The greatest barrier to enhanced collaboration is poor internal communication (Le Meunier-FitzHugh & Piercy, 2010; Menon, Bharadwaj, & Howell, 1996). Interdepartmental conflict is aggravated by poor communication (Piercy, 2006; Ruekert & Walker Jr, 1987). Poor and insufficient communication between both departments [sales and marketing] is a burden (Matthyssens & Johnston, 2006).

Organizational integration generally requires different departments involved to share information. However, those who control information may be reluctant to share because information can often be used to further political agendas and increase organizational power (Barki & Pinsonneault, 2005). Additionally, sales and marketing functions may not exchange information effectively to improve performance (Le Meunier-Fitzhugh & Piercy, 2007b). Sales often complains about lack of timely availability of information from marketing (Cespedes, 1993), while marketing replies they invested time and money to gather information which is not being used by sales (Madhani, 2015; Moorman, Rossman, & Zoltners, 2007).

Lack of Shared Vision and Customer Focus

Dysfunctional sales and marketing conflicts may occur from vision, alignment, processes, information, knowledge, decisions, resources, and culture at the organizational, inter-functional, or interpersonal levels not being shared. In turn, conflict inhibits the organization's development of critical market-based capabilities that span functional boundaries.

A disconnection between marketing and sales is making it difficult for organizations to make the most of their sales opportunities. Companies are unable to provide the right offers to the right person at the right time because customer insight lives in disparate locations and the company's go-to market strategies are uncoordinated. In an ideal world, marketing and sales create a shared go-to market strategy that focuses on customers, not products (Peppers, 2008).

Sales and marketing do not have a shared vision of the ideal customer [for their organization]; there is a lack of 360-degree view of customers and their buying preferences (Peppers, 2008). Peppers (2008) noted there is no reward system today for sales and marketing to build strong customer relationships. Businesses that do not pay attention to their customers' communication preferences can seriously impact their long-term value (Peppers, 2008). Problems may also arise because the sales organization feels it owns customer relationships and resists all efforts from other departments to contact their customers (Biemans et al., 2010).

Lack of integration between sales and marketing results in loss of customer satisfaction, trust and loyalty, and deterioration of the customer relationship (Madhani, 2015). When working relations between sales and marketing are poor, the communication, coordination, and collaboration crucial for the provision of overall customer value proposition may be lacking (Madhani, 2015).

Strategic Planning: Goals and Objectives

Very often the sales function is not involved in strategy making (Kotler et al., 2006). Rather, in many organizations, strategies are created by marketing without input from sales; the sales personnel are introduced to new strategies only when their marketing counterparts hand them over for implementation (Kotler et al., 2006). Sales people may believe they should assume a strategic role; however, marketers may not view them as strategic partners and not offer sales opportunities to get extensively involved in strategy-creation activity (Malshe, 2009).

According to Matthyssens and Johnston (2006), the marketing and sales planning processes are often considered a burden. In addition, coordination and integration are supposed to happen afterward, but nobody takes ownership of that process (Matthyssens & Johnston, 2006). Sales staff are frequently excluded from marketing planning activities and often their short-term goals forced them to focus on objectives that conflicted with those of marketing (Le Meunier-FitzHugh & Piercy, 2007b).

There is often poor coordination, particularly in planning and goal setting, between sales and marketing (Colletti & Chonko, 1997; Kotler et al., 2006; Piercy, 2006; Rouziès et al., 2005; Strahle et al., 1996). A strategic plan typically incorporates: goals, objectives, tactics, effectiveness evaluation, budget, and timeline. Misalignment of goals and/or objectives has significant impact on strategies and their success or failure. A poor definition of goals of the two functions is likely to lead to inconsistencies between marketing strategies, sales management processes, and sales force activities, negatively affecting the final value proposition offered to customers (Colletti & Chonko, 1997; Strahle et al., 1996; Troilo et al., 2009).

Sales and marketing frequently have different goals set by senior management, leading to lack of coordination of activities as well as working at cross-purposes to each other (Le Meunier-Fitzhugh & Piercy, 2007b; Lorge, 1999; Piercy, 2006; Rouziès et al., 2005; Strahle et al., 1996). As highlighted by the research of many authors, goal differences may be a source of interdepartmental friction; differing backgrounds and philosophies, poorly aligned goals (Dawes & Massey, 2005; Piercy, 2006), as short-term sales goals conflict with the long-term orientation of marketing (Madhani, 2015; Dewsnap & Jobber, 2002; Slater & Olson, 2001; Montgomery & Webster, 1997; Strahle et al., 1996). Conflict is likely to develop where there is a mix of collective goals, coupled with managers' self-interest, under conditions of interdependence (Dawes & Massey, 2005).

In a study by Matthyssens and Johnson (2006), sales managers reported little interaction during the marketing strategic planning phase, although they said they would like to cooperate more intensively during the development of a product, price, and communication policy. They are in favor of further formalization of the interaction during this phase. There was minor input from sales on the definition of objectives and the selection of the positioning (Matthyssens & Johnston, 2006). Consequently, many sales people do not support strategies marketing develops because they feel these strategies are inappropriate, ineffective, irrelevant, or disconnected from reality (Aberdeen, 2002; Donath, 1999; Malshe, 2009; Strahle et al., 1996).

Performance Metrics and Rewards

Among the most cited reasons for poor integration and conflict between marketing and sales are different perspectives and time frames used in the processes of goal setting, resource allocation, and performance evaluation (Guenzi & Troilo, 2006; Rouziès et al., 2005; Strahle et al., 1996). One of the barriers to shared goals and objectives is the issue of shared rewards. Sales people historically work on commission and marketers do not (Kotler et al., 2006). Performances of marketing and sales are judged very differently (Kotler et al., 2006), as is success (Peppers, 2008). Marketing and sales metrics differ within many organizations and those differences [may] create a degree of jealousy between sales and marketing (Malshe, 2010).

One difficulty in integrating marketing and sales is although these departments have similar aims (e.g., to improve market penetration and increase sales), they have different goals frequently set by senior management, against which their performance is measured. Sales and marketing may therefore be rewarded for behaviors and outcomes that are inconsistent with each other's objectives and these contradictory, competitive goals may reduce cross-functional collaboration and increase conflict (Le Meunier-FitzHugh, Massey, & Piercy, 2011). According to Kotler et al. (2006) one of the barriers to shared objectives is the thorny issue of shared rewards.

Rewards. Le Meunier-FitzHugh, Massey, and Piercy (2011) indicated aligned rewards have not been universally adopted within organizations. Differences in reward structures between functional areas may cause serious coordination problems and lead to inter-functional conflict (Le Meunier-FitzHugh et al., 2011). Evaluation and reward systems within the organization are not adapted to create positive cooperation between marketing and sales (Matthyssens & Johnston, 2006). In many organizations, sales and marketing are being pulled in different directions by their reward systems (Le Meunier-FitzHugh et al., 2011). Rewards can become a source of friction, especially if each is offered strong incentives to achieve their own targets (Le Meunier-FitzHugh et al., 2011).

Despite support from literature for using reward systems to improve functional integration (Dewsnap & Jobber, 2000; Kotler et al., 2006; Rouziès et al., 2005), Le Meunier-FitzHugh and Piercy (2007b) found little evidence they [reward systems] have been employed successfully.

Organizational Intelligence

Organizational intelligence is a key differentiator in determining the level of success (or failure) of organizations. Formalized organizational systems typically segment intelligence into three categories: market intelligence, competitor intelligence, and customer intelligence. Intelligence consists of three elements: collection; analysis; and dissemination. For an intelligence system to be effective all three elements should work in concert (Le Meunier-FitzHugh & Piercy, 2006). In many organizations there does not appear to be a recognized process for integrating of information into market intelligence systems (Le Meunier-FitzHugh & Piercy, 2006).

According to Le Meunier-FitzHugh and Piercy (2007a), a critical dimension of effective collaboration is information sharing. In many organizations, market information may be available, but organizational structures and processes fail to facilitate prompt and meaningful information exchange (Le Meunier-FitzHugh & Piercy, 2006). Many organizations fail to analyze competitor intelligence collected from or by sales or to integrate this data into a general market intelligence system (Le Meunier-FitzHugh & Piercy, 2006). Intelligence data can be rendered useless if not properly processed and analyzed; or if not communicated quickly and effectively to decision-makers. Following collection, market intelligence needs to be disseminated across boundaries (Le Meunier-FitzHugh & Piercy, 2006).

One of the key resources needed for customer relationship management (CRM) execution is the constant supply of information such as customer profiles and their current and future expressed and unexpressed needs. The responsibility of collecting customer data and purchase patterns, and feeding it into a CRM database, falls upon sales people who are not excited about these tasks because they take time away from selling activities. Further, sales people feel a sense of ownership of their customer knowledge [or information] they have developed over time, which makes them scarcely willing to share customer details with marketers (Hughes et al., 2012). A sub-optimally functioning customer relationship management capability may compromise an organization’s ability to forecast customers’ future needs, affecting both the supply chain and new product capability (Hughes et al., 2012).

For objective data, sales managers are very dependent on the marketing department. However, marketing managers indicated almost no information was transmitted from sales to marketing (Le Meunier-FitzHugh & Piercy, 2006). Sales people may be reluctant to pass information on to marketing if there is no clear benefit in doing so (Homburg & Pflesser, 2000; Le Meunier-FitzHugh & Piercy, 2006). Unless sales personnel are able to understand how their information contributes to the organization’s activities and feel their participation is valued, they often will not provide timely and pertinent information to the organization. Sales people will be motivated to provide information about customers' and competitors' as long as they believe their efforts will be rewarded and the information will not disappear into an organizational 'black hole' (Le Meunier-FitzHugh & Piercy, 2006).

Lead Generation

In many companies as much as 80 percent of marketing expenditures on lead generation and sales collateral are wasted – ignored as irrelevant and considered unhelpful by sales (Biemans & Brenčič, 2007). According to Biemans and Brenčič (2007), this finding is echoed by Schmonsees who conducted interviews with executives of more than 250 companies and concluded 80 to 90 percent of the content produced by marketing is considered useless by sales. Industry reports suggest the sales force ignores as many as 70 percent of leads marketing generates (Watkins, 2003). Marketing frequently complains about good leads disappearing into the "black hole" of sales (Biemans & Brenčič, 2007; Donath, 2004). In turn, sales people argue marketing managers have become isolated from the sales process and cannot discern a good lead worthy of timely follow-up (Smith, Gopalakrishna, & Chatterjee, 2006).

Marketing and sales have been placing blame on the 'other' function for years. Scholars have recently begun exploring this conflicted relationship, causes, and impact on organizational performance. Various research themes are beginning to emerge on how to improve marketing and sales interactions from the perspectives of: configurations, interfaces and relationships; collaboration; and most recently, integration.

Marketing and Sales Interaction

Interaction between marketing and sales in organizations has been gaining increasing attention among scholars. Various aspects of interaction have been investigated including: configurations; archetypes and domains of interfaces; as well as relationships.

Biemans (2010) identified four marketing and sales configurations: hidden marketing, sales-driven marketing, living apart together, and integrated marketing-sales; each configuration representing a different organizational arrangement, operating/process characteristics, and outcomes (Malshe, 2015) (Table 3).

Table 3.
Marketing and Sales Configurations and Relationship Characteristics (Biemans et al., 2010; Malshe, 2015)

Configuration	Operating/Process Characteristics	Outcomes
Hidden Marketing	• marketing not a separate function • marketing performed by chief executive officer and/or sales director	• organizations do not think strategically • always in firefighting mode • lack the resources to create long-term strategic plans and programs
Sales-Driven Marketing	• marketing is a spin-off from sales • one or two marketing people	• focus on supporting day-to-day sales activities • try to initiate long-term strategic planning
Living Apart Together	• distinct established marketing and sales functions • well-defined job descriptions	• marketing analyzes market information; creates marketing plans and programs • sales implements marketing programs • sales appreciates added value of marketing • marketing's primary function is still to support sales
Integrated Marketing and Sales	• marketing and sales exist as separate independent functions • frequently work together voluntarily • both functions involved in each other's activities • jointly responsible for creating marketing plans and programs	• mutual respect • information freely shared

In a 2008 study, Homburg et al. identified archetypes of the marketing and sales interface and grouped them into five clusters: sales rules, marketing-driven devil's advocacy, brand-focused professionals, ivory tower, and sales-driven symbiosis. The most successful configurations are characterized by strong structural linkages between marketing and sales with a high level of market knowledge in marketing (Homburg et al., 2008) (Table 4).

Table 4.
Archetypes of the Marketing and Sales Interface (Homburg et al., 2008)

Marketing and Sales Archetype	Relationship Characteristics
Sales Rules	• marketing subordinate to sales • marketing role limited • little structure, cooperation, formalization, or joint planning • teamwork lowest of all the clusters • short term marketing orientation
Marketing-Driven Devil's Advocacy	• distinct, independent marketing "fiefdom" that challenges the sales function • palpable conflict between marketing and sales • formalized cooperation between marketing and sales • marketing has long-term strategic focus • sales has short-term operative focus; represent voice of customer
Brand-Focused Professionals	• strong marketing department; central guidance function • market-oriented culture • marketing is powerful and product driven • successful market leadership • highest levels of formalization, joint planning, teamwork, and information sharing • both marketing and sales have high levels of market and product knowledge • long-term orientation • cooperation is structured and professional
Ivory Tower	• marketing and sales lack understanding for products and market needs • marketing has high customer focus and medium time orientation • sales has short-term, product-driven, operative selling role
Sales-Driven Symbiosis	• sales is more powerful player • both marketing and sales are highly customer focused • structured cooperation • high levels of teamwork, formalization, and joint planning

Emergent Marketing and Sales Relationship

Peppers (2008) explored issues with the marketing and sales relationship which included suggestions for creating synergy by focusing on customers, as well as involving sales [along with marketing] in strategy development. Peppers (2008) defined the ideal marketing and sales relationship as emergent; moving from the 'old way' to the 'new ideal way'; identifying ideal attributes (Table 5).

Table 5.
Emergent Marketing and Sales Relationship: Comparing Old Relationships to New Recommended Relationships and Ideal Attributes (Peppers, 2008, p. 10)

Attribute	Old Way	New/Ideal Way
Organization	Operating in silos	Integrated & collaborative
Strategy	Selling products to customers	Building relationships with customers
Motivation	Reward short-term transactions	Reward long-term relationships with profitable customers
Target	Wide customer audience	Profiled and segmented based on customer insight (value and needs)
Relationship	Transactional relationship	Interpersonal and digital relationships
Operating Mode	Self-directed	Mission-directed

Integrated Marketing and Sales Relationships

Citing Webster (1997), Homburg et al. (2008) suggest 'integrated marketing and sales' is characterized by a strong marketing department, intense use of teams and other structural linkages, and a high level of success.

According to Biemans (2010), when marketing and sales are integrated, they exist as separate independent functions, but are closely related and play complimentary roles. Both functions are jointly responsible for creating marketing plans and programs. Moreover, even though marketing and sales are responsible for several specific non-overlapping tasks, they frequently work together voluntarily. Organizations with marketing-sales integration seem to enjoy a constructive, harmonious marketing-sales interface. There is mutual respect, information is freely shared, and both functions are involved in each other's activities to increase the organization's overall performance in the marketplace (Biemans et al., 2010; Malshe, 2015).

The most effective marketing and sales interface is characterized by high and equal level of power between the functions; low level of conflict; high level of collaboration; high relationship effectiveness; high degree of customer orientation; and high company performance (Avlonitis & Lionakis, 2015).

In their study to identify best practices to enhance joint performance and overarching contributions of marketing and sales, Kotler et al. (2006) encourage integration of marketing and sales based on four relationship levels: undefined*,* defined, aligned, and integrated; indicating characteristics of each (Table 6).

According to Kotler (2006), there are good reasons to move sales and marketing into an integrated relationship. This means integrating such straightforward activities as planning, target setting, customer assessment, and value-proposition development. It is more difficult to integrate the two groups' processes and systems; these must be replaced with common processes, metrics, and reward systems. Organizations need to develop shared databases, as well as mechanisms for continuous improvement (Kotler, 2006). Hardest of all is changing the culture to support integration. The best examples of integration they found in their study (2006) were companies that emphasized shared responsibility and disciplined planning; were metrics driven; tied rewards to results; and were managed through systems and processes (Kotler, 2006).

Kahn and Mentzer (1998) found both inter-departmental relationships and performance improve with collaboration. In their 2011 study, Le Meunier-FitzHugh, Massey, and Piercy suggest positive informal relationships between sales and marketing personnel may have a significant impact on reducing inter-functional conflict. To improve the relationship, senior managers need to reduce conflict of interests, create effective communication, promote organizational learning, share marketing information, and undertake joint marketing planning (Le Meunier-Fitzhugh & Piercy, 2007b).

Table 6.
Integrating Marketing and Sales Based Relationship Levels (Kotler, 2006, p. 1).

RELATIONSHIP	**Characteristics**
Undefined	• Focus on their own tasks and agendas unless conflict arises between them. • Have developed independently • Devote meetings between them to conflict resolution, not proactive collaboration
Defined	• Have rules for preventing disputes • Share a language for potentially contentious areas (e.g., defining a “lead”) • Use meetings to clarify mutual expectations
Aligned	• Have clear but flexible boundaries: sales people use marketing terminology; marketers participate in transactional sales • Engage in joint planning and training
Integrated	• Share systems, performance metrics, and rewards • Behave as if they’ll “rise or fall together”

Marketing and Sales Integration

According to Shapiro (2002), there are many approaches to improving integration. However, all programs must begin with two hallmark approaches: 1) a common understanding of the need for integration [of sales and marketing]; and 2) a clear, unified, explicit strategy. Both sales and marketing need to focus on productive sharing of power, information, and resources (Shapiro, 2002). According to Kotler et al. (2006), when sales and marketing are fully integrated, boundaries become blurred; both groups redesign the relationship to share structures, systems, and rewards. Marketing and sales begin to focus on strategic, forward thinking types of tasks (Kotler et al., 2006).

In addition to lacking clarity and detailed specification, there is no widespread agreement on the nature of the marketing and sales integration construct. Researchers (Homburg & Jensen, 2007; Homburg et al., 2008) reference Lawrence and Lorsch who in 1969 defined integration as the quality of the state of collaboration that exists among departments required to achieve unity of effort by the demands of the environment; and the process of achieving unity of effort among the various subsystems in the accomplishment of the organization's tasks.

Song, Xie, and Dyer (2000) conceptualize cross-functional integration as three related components: level of cross-functional involvement, quality of cross-functional information, and harmony of cross-functional relationships. Level of cross-functional involvement refers to the degree of coordination among marketing and other functions in analyzing market opportunities, visiting potential major customers, and establishing the commercial direction. Quality of cross-functional information refers to the accuracy, promptness, and timeliness of information exchanges. Harmony of cross-functional relationships refers to the degree of communication, interaction, and collaboration among the areas and their general sense of responsibility and satisfaction with relations.

Kahn (1996, 1998) characterized interdepartmental integration in three ways. The first focuses on interaction between departments including communication and flow of information;

emphasizing effective interaction occurs place when functions regularly exchange information in a structured way through meetings, memoranda, documents, e-mails, telephone calls, cross-functional training, etc. (Ruekert & Walker Jr, 1987).

The second, collaboration view, defined integration as a state of high degrees of shared values, mutual goal commitments, and collaborative behaviors; and the quality or state that exists among departments, which are required to achieve unity of effort by the demands of the environment (Kahn & Mentzer, 1998; Lawrence & Lorsch, 1969) where departments work collectively toward common goals (Lawrence, Lorsch, & Garrison, 1967). Collaboration requires that departments are willing to work together and share the same vision, goals and resources (Kahn, 1996).

A third associates information sharing and involvement with interdepartmental integration to suggest a composite of integration, where integration subsumes interactive and collaborative processes (Kahn & Mentzer, 1998). Integration is seen as reflecting how harmoniously different departments work together and how tightly coordinated their activities are (Barki & Pinsonneault, 2005).

Kahn and Troilo define marketing and sales integration as the degree of interaction and collaboration between units (Troilo et al., 2009). Similarly, integration can be defined as the extent to which the activities carried out by the two functions are supportive of each other and lead to the realization of each other’s goals and objectives in a coordinated, synchronized or thoughtfully sequenced manner (Lyus et al., 2011).

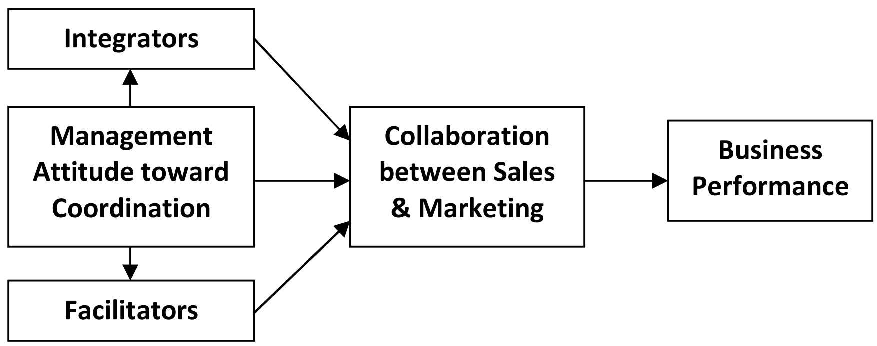
In a study by Guenzi and Troilo (2006), executives interviewed described marketing and sales integration in terms of coordination, collaboration, communication, working relationships, level of conflict, and distribution of power; as well as levels of integration of goals, resources, or activities carried out by the two departments. Guenzi and Troilo (2006), who are believed to be the first authors to articulate marketing and sales integration as a 'construct', reinforce Dewsnap and Jobber (2000) and Rouziès et al. (2005) articulating communication (considered the central node) and collaboration as two components of the construct; where trust, motivation, commitment, mutual help, reduced inter-group conflict, and positive organizational climate also play a role.

Marketing and Sales Coordination

Elaborating on Kahn's 1996 research, Le Meunier-FitzHugh and Piercy (2007b) identified three types of factors influencing coordination between sales and marketing: management attitudes toward coordination, integrators, and facilitators (Figure 7). Sales and marketing more often need to collaborate as opposed to integrate. They define collaboration as working together, indicating a need to build bridges between two culturally different entities, with the aim of creating opportunities for learning and improving functionality to improve business performance (Le Meunier-FitzHugh & Piercy, 2007b).

Management attitude. Management's attitudes toward coordination influence both the 'integrators' and 'facilitators' of collaboration, as well as directly affect collaboration between sales and marketing. A positive management attitude toward coordination will help develop a culture of sharing, allow compatible goals to be set, joint planning to take place, establish esprit de corps, and develop a common vision (Le Meunier-Fitzhugh & Piercy, 2007b).

Integrators. Integrators were defined as those activities that take longer to develop and 'cement' the inter-group relationship; factors that directly influence collaboration between sales and marketing. Five integrating variables were highlighted: 1) communication, 2) organizational learning, 3) marketing information systems, 4) conflict of interests, and 5) marketing planning (Le Meunier-Fitzhugh & Piercy, 2007b).



Factors affecting collaboration between sales and marketing

Integrators
- Communication
- Organizational Learning
- Market Intelligence
- Conflict of Interests
- Market Planning

Management Attitude
- Align Goals
- Foster Mutual Understanding
- Establish Esprit de Corp
- Share Resources
- Create Common Vision

Facilitators
- Cross-Functional Training
- Rewards
- Integration Mechanisms

Figure 7. Antecedents and consequences of collaboration between sales and marketing (Le Meunier-Fitzhugh & Piercy, 2007b, figure 1, p.944).

Facilitators. Facilitators were considered to be physical mechanisms that can be put in place quickly to provide interaction and coordination of activities. Le Meunier-FitzHugh and Piercy (2007b) identified three facilitators: cross-functional training, rewards, and integration mechanisms.

Integrating Marketing and Sales

The main rationale for integrating sales and marketing is the two functions have a common goal: the generation of profitability and increasing revenue (Kotler et al., 2006). Marketing and sales functions are most valuable working together: understanding, creating, communicating, delivering and profitably harvesting value (Oliva, 2006). Organizations, who seem to be getting the most from their marketing and sales teams, have found a way to get diverse talents to work together: mobilize around their strengths, work with common language, mutually engaged organizational structures, and well-defined processes to produce results (Oliva, 2006).

Integration can be achieved at different organizational levels: from bottom-line activities to strategic decision-making and long-term investments decisions; sharing of goals, resources, strategies and plans (Guenzi & Troilo, 2006). Cross-functional integration requires employees from different departments to communicate and interact, to exchange work, resources, and assistance (Ruekert & Walker Jr, 1987).

Marketing and Sales Integration Antecedents

Drawing on studies of marketing's integration with other functional groups (e.g., finance, production, research and development), Dewsnap and Jobber (2000) propose antecedents to marketing and sales integration, including senior management, operating characteristics, and structure.

Senior management. Senior management antecedents include values integration, providing opportunities, personnel background, and joint rewards (Dewsnap & Jobber, 2000). They suggest senior managers promote the values of integration; provide opportunities for marketing and sales to develop mutual understanding of each other‘s roles and contributions; increase the number of sales personnel with brand-related experiences and marketing personnel with trade-related experience; and jointly reward both sales and marketing personnel for successful business outcomes to improve integration.

Operating characteristics. Dewsnap and Jobber (2000) suggest high integration organizations exhibit the following operating characteristics: a high level of give-and-take; both marketing and sales are involved in the early stages of projects; and conflicts are resolved at low levels in the organization. The notion of give-and-take assumes each group is able to challenge the other, while simultaneously trying to understand the other's point of view. Involving both functions in the early stages of projects facilitates communication and the generation of mutual understanding. When conflicts arise, they should be confronted and resolved cooperatively rather than ignored.

Structure. In their 2002 study, Dewsnapp and Jobber stress the importance of deploying organizational structures that enable personnel from both sales and marketing to work together to perceive and/or develop mutual understanding, mutual respect, a sense of esprit de corps, and joint commercial objectives. Their structural antecedents include: formalization, decentralization, participation, physical proximity, and methods of organizing (Dewsnapp & Jobber, 2002). Formalization is the extent to which an organization clearly defines roles, responsibilities, and performance standards. They suggest higher levels of performance are associated with higher levels of integration. Centralization refers to both the organizational level at which decision making occurs and the degree of employee participation in decision making; where higher degrees of centralization correspond with concentration of decision making authority at more senior levels. Indicating cross-functional integration is positively related to decentralized decision making, Dewsnap and Jobber (2000) similarly suggest the more employees who participate in decision making the greater the degree of integration between marketing and sales. Locating the marketing and sales functions physically close to each other increases integration (Dewsnap & Jobber, 2002). Methods of organizing address mechanisms such as: using tasks forces, teams, and project managers to foster integration (Dewsnap & Jobber 2000).

Rouzies et al. (2005) suggest structural approaches for improving sales and marketing integration include decentralization, cross-functional teams, and integrators. A centralized organizational structure creates a climate of tension, where a decentralized system is likely to induce cross-functional communication or resource exchange (Rouzies et al., 2005). Cross-functional teams allow team members to develop a better appreciation and understanding of the issues and perspectives facing the marketing and sales functions (Rouzies et al., 2005). By making decisions jointly as a team, the members feel a sense of ownership in the decisions and tend to champion the decisions when they interact with others in their functional area. The third structural approach for improving sales-marketing integration is to assign employees to a special integrator role. Integrators have the responsibility for improving interaction between functional areas, but do not have the authority to affect the way work is done (Guenzi & Troilo, 2006; Rouzies et al., 2005).

Linkage has been suggested between an integrated sales and marketing structure and high performance (Oliva, 2006). Marketing and sales functions knit together by design, not siloed in separate functions, or isolated from one another, exhibit the strongest linkages. Departments located within close physical proximity are more likely to exhibit high levels of integration (Gupta et al., 1985; Le Meunier-FitzHugh & Piercy, 2008). Some scholars have suggested the interface may be improved through co-location of sales and marketing activities (Dewsnap & Jobber, 2000; Rouziès et al., 2005). There have been suggestions that placing the sales and marketing departments in close physical proximity will have benefits in terms of collaboration and performance (Dawes & Massey, 2005; Dewsnap & Jobber, 2000). When people are physically close, they interact more often and are more likely to work well together (Kotler et al., 2006).

Merging the marketing and sales departments structurally can increase the physical proximity of their staff and frequency of interaction; greater interaction can increase understanding of each other's work-related priorities and issues (Dawes & Massey, 2005). The organizational structure itself creates ongoing discussion between marketing and sales people (Oliva, 2006). Some academic researchers have suggested co-location of relevant individuals stimulates a continuous open dialogue (Biemans & Brenčič, 2007). Managers have emphasized open communication is stimulated by close proximity of the people involved, implying co-location is an important factor in stimulating informal communication (Biemans & Brenčič, 2007). Spontaneous communication during informal encounters is necessary to create open dialogue that is key to bridging different thought worlds (Biemans & Brenčič, 2007; Maltz & Kohli, 2000).

Marketing and Sales Integration Practices

For this study 'practices' will be used as a collective term for other terms used in academic literature which include (but are not necessarily limited to): mechanisms, facilitators, components, and activities. As suggestions for integrating marketing and sales emerging, the most common themes in academic literature have evolved into the following categories: structure, communication, organizational knowledge, role clarity, a customer focus, strategic planning, performance metrics, rewards, organizational intelligence, and demand/lead generation. Although structure is cited by some scholars as a method for integrating marketing and sales, this researcher agrees it is most appropriate to classify structure as an antecedent, in agreement with Dewsnap and Jobber (2000), as discussed earlier.

Establishing integration mechanisms can reduce conflict and their presence should be indicative of a high level of collaboration between sales and marketing (Jaworski & Kohli, 1993; Le Meunier-FitzHugh & Piercy, 2007b). According to Barki and Pinsonneault (2005), a number of mechanisms can facilitate the achievement of organizational integration. These include standardizing work (i.e., common and clearly specified procedures and tasks), output (i.e., clearly specified results or output of work), skills and knowledge (i.e., standardized training and expertise), norms (i.e., establishment of common values, beliefs, and expectations), direct supervision (i.e., someone not directly doing the work, but being responsible for coordinating the activities), planning (i.e., establishment of schedules governing activities of different units), and mutual adjustment (i.e., people or units adapting to each other during their work processes) (Barki & Pinsonneault, 2005).

Matthyssens et. al. (2006) recommended several ways to improve integration between marketing and sales including (but not limited to) the following activities: coordinated visions, objectives and activities; customer focus; timely, quality communication; role clarity; joint training; and rewards.

Effectiveness of the linkage between marketing and sales requires strong communication. Organizations, which clearly define roles of marketing and sales, have joint meetings, sales calls and demand generation processes; engage in training; and achieve better alignment results (Oliva, 2006).

Communication. One of the key drivers of cross-functional integration is communication (Rouziès et al., 2005); communication appears as the central node in the network of concepts representing integration (Guenzi & Troilo, 2006). Kahn and colleagues (Kahn, 1996, 2001; Kahn & Mentzer, 1998) suggest communication and mutual understanding are two main components of interdepartmental integration. Organizations must build communication bridges across various levels between the two functions [sales and marketing] (Guenzi & Troilo, 2006; Malshe, 2011). Effective communication between marketing and sales yields many positive outcomes including: stimulating confrontation, mutual understanding, collaboration, and sharing. These, in turn, foster increased effectiveness and efficiency of market knowledge development and decision making, while supporting an organizational climate based on trust and cooperation (Guenzi & Troilo, 2006).

Communication is a complicated, well researched construct with many facets. To provide a manageable framework for this research, the most recognizable and commonly cited communication terms used to ensure communication success in organizations will be highlighted including: effective, credible, bi-directional, formal, and informal communication, as well as communication frequency and quality.

Le Meunier-FitzHugh and Piercy (2007b) claimed the literature review and case study exploration they conducted confirmed communication plays a key role in aligning sales and marketing activities. Communication has a strong positive effect on satisfaction with the marketing and sales relationship, and effective communication has a powerful effect in reducing conflict (Massey & Dawes, 2007).

Effective communication. Effective communication was indicated as the most important factor to solve and prevent problems between both [marketing and sales] departments, in a study conducted by Matthyssens and Johnston (2006). Communication flows are critical to ensure day-to-day effectiveness between the two (Beverland et al., 2006).

Communication is frequently cited as important in improving collaboration. This receives support from Gupta, Raj, and Wilemon (1985), who found improved communication can lead to greater inter-functional integration. Integrative efficiency depends on how effectively organizational members receive, interpret, and respond (in an appropriate manner) to messages sent by other members or the environment, (Barki & Pinsonneault, 2005). Organizational integration is reflected by responsiveness (Barki & Pinsonneault, 2005). Kohli and Jaworski (1990) found effective communication had an impact on business performance (Le Meunier-FitzHugh & Piercy, 2007a).

Credible communication. Cross-functional integration requires employees from different departments to communicate and interact to exchange work, resources, and assistance (Madhani, 2015; Ruekert & Walker, 1987). Open and respectful communication between sales and marketing provides a platform to clarify misunderstandings; ask for each other's feedback and help when needed; and keep the other function abreast of what is happening on important initiatives. The constant flow of information may bring greater transparency in their interactions, building trustworthiness within this interface. Further, open lines of communication allow marketers more opportunities to showcase their sales expertise, or their business savvy, enhancing their credibility (Malshe, 2010). Communication leads to trust (Borders, 2006). According to Biemans (2010), the free flow of information, combined with mutual respect, facilitates collaboration in almost all marketing and sales activities, such as identifying new market opportunities, creating new product offerings, and responding to changes in the marketplace.

Bi-directional communication. Communication has to be two-way, or consultative, to be effective in reducing interdepartmental conflict (Le Meunier-FitzHugh & Piercy, 2007a). Bi-directional communication, as defined by Massey and Dawes (2007a), reduces ambiguity, facilitates dialogue, helps clarify and improve dyadic communication, increases relationship effectiveness and is associated with a state of low dysfunctional conflict.

Formal and informal communication. Communication between sales and marketing can be formal and informal. Both formal and informal communication facilitates inter-functional integration (Rouziès et al., 2005).

Formal communication. Some studies focus on developing interactive behaviors and emphasize the use of formal communication between departments, representing the structural nature of cross-departmental activity (including routine meetings and the flow of standard documentation) (Ruekert & Walker Jr, 1987). Formal communication is most effective when communicating important information that summarizes jointly developed decisions, for disseminating information needed on a recurring basis, such as the reporting of market intelligence. Examples of formal communication are regularly scheduled meeting and reports (Rouziès et al., 2005).

Informal communication. Informal communication is unplanned and unverifiable (untraceable after the occurrences). Informal communication is particularly effective when dealing with unstructured problems and uncertainties in the environment. The extent to which informal communication will be effective is strongly influenced by the organizations' culture and the characteristics of the individuals involved (Biemans & Brenčič, 2007).

The aim is to create both formal and informal communication between sales and marketing staff at all levels (Fisher, Maltz, & Jaworski, 1997; Le Meunier-FitzHugh & Piercy, 2010). Informal communication allows connections over issues of mutual interest (Dawes & Massey, 2005); where formal communication (including meetings and reports) may be used to set direction, clarify roles, and summarize events (Le Meunier-FitzHugh & Piercy, 2010). The two types of communication have different properties and are likely to play different roles in realizing sales and marketing integration (Rouziès et al., 2005). Marketing and sales integration is realized through an optimal mix of formal and informal means of communication, with people in both departments stimulated and motivated to exchange information (Biemans et al., 2010).

Communication frequency. Establishing appropriate frequency and type of communication between groups is an effective way of improving collaboration between sales and marketing (Le Meunier-FitzHugh & Piercy, 2010). Increased communication helps ensure confrontation of different thought worlds so mental models (of both parties) are challenged and functional oversimplification of market representations can be avoided (Guenzi & Troilo, 2006).

Align sales and marketing through frequent, disciplined, cross-functional communication and joint projects (Kotler et al., 2006). Communication frequency has been associated with better cross-functional coordination (Massey & Dawes, 2007). Frequent cross-functional communication is beneficial, allowing personnel to become conversant with, and better understand the language and jargon of their counterparts (Massey & Dawes, 2007). Similarly, more frequent communication can reduce uncertainties associated with an activity, facilitate performance, and lead to mutual understanding and better rapport within teams (Massey & Dawes, 2007).

Le Meunier-FitzHugh and Piercy (2009) found establishment of frequent and effective communication between sales and marketing functions through meetings and other exchanges relevant to their collaboration. Souder (1977) noted frequent meetings to discuss joint involvements and increase sharing of information aided in establishment of collaboration. Frequent communication has been linked to project success, cross-functional integration, improved coordination, better understanding of others' information requirements, and relationship effectiveness (Massey & Dawes, 2007; Ruekert & Walker Jr, 1987). Studies suggest frequent communication should be associated with positive outcomes such as low dysfunctional conflict, high functional conflict, and high perceived relationship effectiveness (Massey & Dawes, 2007).

Communication quality. Communication needs to be timely and of high quality at all times (Matthyssens & Johnston, 2006). Communication quality, involving close and informal communication, is positively associated with cross-functional integration (Massey & Dawes, 2007). Communication quality is defined as how credible, understandable, relevant, and useful the information provided is (Massey & Dawes, 2007). Massey and Dawes (2007) found communication frequency is positively associated with communication quality and communication quality had the single strongest positive effect on functional conflict and perceived relationship effectiveness.

When it comes to improving relations between any two functions, the first step inevitably involves improving communication; more disciplined communication (Kotler et al., 2006). When members of the two functions meet regularly, exchange information, and develop a mutual understanding; the chance to achieve the objectives set for market-related decisions is increased (Dewsnap & Jobber, 2002). Periodic meetings [ideally monthly; quarterly at a minimum] between the marketing and sales staff are recommended as a part of a preventive and positive approach of problem solving and conflict resolution (Atteya, 2012). Major opportunities, as well as any problems, should be on the agenda. Focus the discussions on action items that will resolve problems, and perhaps even create opportunities, by the next meeting. Sales people and marketers need to know when and with whom they should communicate. Companies should develop systematic processes and guidelines (Kotler et al., 2006).

Because the sales environment is changing at a tremendous rate, the emphasis is not nearly as much on creating value, as the ability to communicate it (Borders, 2006). Well informed sales people are said to be more committed (Matthyssens & Johnston, 2006).

Organizations may enhance collaboration between marketing and sales by implementing specific programs to increase communication and cooperation (Biemans et al., 2010; Ingram, 2004). Le Meunier-FitzHugh and Piercy (2010) found creating effective communication (formal and informal), interactive market intelligence systems, and learning are three factors that may be used to improve the sales and marketing interface.

Organizational knowledge. Organizational integration requires individuals to communicate and share knowledge (Barki & Pinsonneault, 2005). Knowledge is a function of experience, contextual expertise, and interpretation, which refers to a capacity to exercise judgment and act (Davenport, De Long, & Beers, 1998). Market orientation demands the transfer of knowledge across functions (Hughes et al., 2012). Studies on market orientation (Jaworski & Kohli, 1993; Kohli & Jaworski, 1990) posit the typical processes of market oriented companies (e.g. effective marketing intelligence dissemination and organizational responsiveness) have a positive impact on employee satisfaction (Guenzi & Troilo, 2006). Finding areas of common ground to facilitate sharing knowledge and skills promotes collaboration and improves communication (Le Meunier-FitzHugh & Piercy, 2009).

***Organizational learning*.** Shared interpretation of information can bring about generative learning (Guenzi & Troilo, 2006). Generative learning is different from adaptive learning (Senge, 1990; Slater & Narver, 1995) as the latter occurs within the actual knowledge base of the organization, where the former challenges long-held beliefs allowing the organization to have a broader perspective about its markets. As a consequence, generative learning improves the effectiveness of marketing decisions contributing to company success via the ability to sense and anticipate future market trends ahead of its competitors (Guenzi & Troilo, 2006).

Le Meunier-FitzHugh and Piercy (2007a) suggest organizations that invest in learning should benefit from greater internal collaboration and improved business performance. Integration between marketing and sales departments fosters the creation of an organizational climate typical of learning organizations. Learning organizations are characterized by organic structures whose main features are recognition of interdependence, information sharing, cooperation and commitment (Slater & Narver, 1995). Other components of marketing and sales integration, like commitment, motivation, and trust, help generate an organizational climate typical of a learning organization (Guenzi & Troilo, 2006; Slater & Narver, 1995).

The creation of learning facilitates collaboration between two diverse and specialist groups to an organization's benefit (Le Meunier-FitzHugh & Piercy, 2010). Le Meunier-FitzHugh and Piercy (2007a) cite Mayers and Wilemon who claim cross-functional learning can lead to improved collaboration between groups because information may be transferred through informal networks. Learning should establish horizontal information exchanges across the organization that can create knowledge to improve customer satisfaction and competitiveness (Ingram, 2004).

Le Meunier-FitzHugh (2007a) cite a 2004 article by Vera and Crossan who claim organizational learning encourages groups to achieve organizational and group goals through positive interactions and information exchanges across departments. Integrated processes require close collaboration of individuals; their training and compensation are likely to influence the achievement of organizational goals, affecting the organizational integration performance (Barki & Pinsonneault, 2005). The marketing function plays a key role in establishing organizational learning through its boundary spanning functions (Slater & Narver, 1995).

Organizational training. In their 2002 study, Dewsnapp and Jobber stress the need for support for joint working and joint training initiatives. Joint training and development courses and sessions are beneficial (Atteya, 2012) as they help stimulate the interface between marketing and sales (Matthyssens & Johnston, 2006). Better educated managers are more likely to have anti-conflict value systems (Dawes & Massey, 2005). Education sessions for both functions [marketing and sales] and the encouragement of an open atmosphere where the assumptions behind sub-cultural frames can be surfaced and discussed will be necessary to move the two functions together (Beverland et al., 2006).

Multifunctional training refers to the extent to which managers are provided with opportunities and encouraged to learn about other functional areas (Maltz & Kohli, 2000). It helps managers understand another function's jargon, reducing language barriers and perceived conflicts resulting from them. Multifunctional training helps functional managers better understand the goals, perspectives, and priorities of other functions, further reducing misunderstandings between functions due to differences in their thought worlds (Maltz & Kohli, 2000). Sales managers would especially like to increase the marketing managers' involvement during training and development (Matthyssens & Johnston, 2006).

Vision. According to Senge (1990), the process of building a shared vision can lead to staff achieving more than they thought they could. Kahn (1996) suggested top management should consider programs that encourage departments to achieve goals collectively, have mutual understanding, work informally together, ascribe to the same vision, and share ideas and resources. The vision becomes achievable as it becomes more real (as a mental reality) (Le Meunier-FitzHugh & Piercy, 2007a). Sharing vision is important to collaboration, and processes need to be identified, which may be relevant to establishing shared vision (Le Meunier-FitzHugh & Piercy, 2007a).

An empowering vision motivates employees to engage in behaviors, which lead toward a common cause, facilitating cooperation and transcending power and competition. It is imperative all functions in an organization share the same vision, including marketing and sales

(Guenzi & Troilo, 2006). Shared vision amplifies the organizations' ability to marshal internal resources, respond to change in a dynamic marketplace, and better execute marketing strategies (Hughes et al., 2012; Krohmer, Homburg, & Workman, 2002).

Role Clarity. Highly integrated firms are characterized by clarity of roles and performance standards (Dewsnap & Jobber, 2000; Gupta, Raj, & Wilemon, 1987). "The extent to which an organization clearly defines roles, responsibilities and performance standards is referred to as formalization" (Gupta et al., 1986, p. 10). Higher levels of formalization are associated with higher levels of integration (Ruekert & Walker Jr, 1987). Troilo et al. (2009) define marketing and sales functional role clarity as the extent to which roles, goals, and responsibilities of units are clearly defined.

Clarify the roles and expectations of marketing and sales. Greater understanding of each other's roles, and the interdependent relationship between the functions, encourage integration between marketing and sales (Beverland et al., 2006). The interface will be stronger if the two functions achieve alignment and clarity on what the other function's activities are (Malshe, 2011). "Make sure everyone in sales and marketing has an appreciation of the others' roles and contributions" (Matthyssens & Johnston, 2006, p. 34, Table 1). Menon et al. (1996, p. 309) suggest, "Managers should formalize overlapping activities that require inter-functional coordination and should clarify roles that are mutually dependent and have potential for role ambiguity" (Le Meunier-FitzHugh & Piercy, 2007a). The clarification of roles and responsibilities, combined with the establishment of procedures and processes for interaction, ensure sales and marketing personnel feel no ambiguity over their roles (Ruekert & Walker Jr, 1987). Well defined processes, with appropriate roles and responsibilities, and a minimum of 'hand-offs', foster the strongest linkages between marketing and sales (Oliva, 2006). Roles and responsibilities, transitional procedures, and rules of engagement become less ambiguous when processes are well defined (Hughes et al., 2012). Accepted formal and informal processes should facilitate marketing and sales cooperation and stimulate multiple functional groups' communication and understanding (Hughes et al., 2010; Krohmer et al., 2002).

To bridge the divide, and forge greater integration across marketing and sales, create opportunities for marketing and sales personnel to understand how the other function's activities contribute to their own (Ingram, 2004; Malshe, 2010; Oliva, 2006). Marketing should go on sales calls; get involved with developing alternate solutions for customers early in the sales process; and sit in on important account-planning sessions. Sales people, in turn, should help develop marketing plans and sit in on product-planning reviews; preview advertising and sales-promotion campaigns; and share their knowledge about customers' purchasing habits. Jointly, marketers and sales people should generate a playbook for expanding business with the top ten accounts in each market segment, as well as plan events and conferences together (Kotler et al., 2006).

Customer focus. A customer focus (also referred to as orientation) is the set of beliefs that puts the customer's interest first, while not excluding those of other stakeholders such as owners and employees, in order to develop a long-term profitable enterprise (Kumar et al., 2008). Customer-oriented culture is central because marketing and sales are the departments that have the specific responsibility of connecting customers with the organization (Troilo et al., 2009).

The organizational structure (marketing and sales) needs to be customer centric (Matthyssens & Johnston, 2006). According to Le Meunier-FitzHugh and Lane (2009), organizations are focusing on improving their customer focus to improve their performance. The strategic advantage of a customer-centric organization is to create value for the customer and, in the process, to create value for the organization (Kumar, Venkatesan, & Reinartz, 2008). A customer-centric organization includes an aligned organizational structure, performance metrics, and an externally focused culture with the objective of satisfying customers' needs (Kumar et al., 2008).

One of the strongest drivers for an organization to align its marketing and sales functions is its global customers (Borders, 2006). Short and long term business value comes from the only business that matters: customers (Peppers, 2008). As the sales and marketing interface has a direct and significant impact on customers, it is possibly of greater importance to improving business performance than many other internal interfaces (Dawes & Massey, 2005; Homburg & Jensen, 2007; Le Meunier-FitzHugh & Piercy, 2007a; Rouziès et al., 2005). Customer orientation requires developing an understanding of buyers' values, which can be achieved and enhanced through reciprocal communication between the sales and marketing departments (Peppers, 2008).

According to Homburg and Pflesser (2000), a customer-oriented culture implies a set of shared beliefs regarding the centrality of the customer. These beliefs function as coordinating mechanisms and improve decision making effectiveness and efficiency. Customer orientation creates a unifying focus of efforts in the creation and delivery of superior customer value (Homburg & Pflesser, 2000). For an organization to be customer oriented, strategic and tactical market-related decisions must be taken inter-functionally to create a sense of commitment and improve effective implementation (Troilo et al., 2009). A customer orientation requires an understanding of buyers', which can be achieved and enhanced through reciprocal communication between the sales and marketing departments (Le Meunier-FitzHugh & Piercy, 2011).

The existence of strong philosophical linkages between sales and marketing personnel has a positive effect on the two functions. Such philosophical linkages may be forged if both functions treat customers as their most important priority, put organizational goals ahead of their functional goals, and view the other function as a partner (Malshe, 2011). Mutual understanding and a shared set of values and beliefs between the two units [marketing and sales] may help them respond more effectively to changing customer needs (Beverland et al, 2006). A shared philosophy to make customer needs and organizational objectives the first priority, with an appreciation for being part of the same team, helps forge a stronger connection between marketing and sales (Malshe, 2011). A successful partnership includes a single mission-directed plan, crafted by stakeholders in both marketing and sales, who share the same success criteria, vision of deal customers, relationship outlook, and process (Peppers, 2008).

Marketing and sales integration is important for meeting customer needs and requirements. Integrating marketing positively affects customer satisfaction and related sales (Rouziès et al., 2005). Introducing shared decision making between marketing and sales augments the customer-oriented culture of an organization (Troilo et al., 2009). A customer-oriented culture allows an organization to achieve customer satisfaction, increase customer loyalty, and attract new customers (Slater, Mohr, & Sengupta, 1995).

Customer value. There has been a drastic increase in pressure on organizations to find new ways to create and deliver value to customers through sales and marketing collaborative initiatives (Madhani, 2015). Their effective interaction may help generate value for customers more rapidly (Matthyssens & Johnston, 2006). Customer value creation is interpreted as the ability to solve customer problems by means of better knowledge and a broader perspective of the market, which allow organizations to make better decisions and innovate (Guenzi & Troilo, 2006). Sales and marketing have the overall common goal to understand customer needs and solve customers' problems, better than the competitors, by offering superior value to customers (Madhani, 2015). According to Olson, Slater, and Hult (2005), organizations with a strong customer orientation pursue competitive advantage by placing the highest priority on the creation and maintenance of customer value. Marketing and sales integration is a key capability contributing to the generation of customer value (Guenzi & Troilo, 2006). Madhani (2015) suggests integration of sales and marketing can help organizations provide superior customer value by developing a mutual understanding of responsibilities, sharing ideas, information and resources, and working together as a team to resolve cross-functional problems.

Marketing and sales integration generates customer value by means of increased organizational citizenship defined as voluntarily helping others with, or preventing the occurrence of, work-related problems; citizenship behavior enhances customer satisfaction by stimulating constructive suggestions about how to improve an organization's value proposition

(Guenzi & Troilo, 2006). Providing customers with superior value, compared to that offered by competitors, an organization can build competitive advantages and improve market performance (Olson et al., 2005; Slater et al., 1995; Troilo et al., 2009). Providing customers with superior value increases an organization's market performance in several ways, for example: expanding revenues through customer retention and positive word-of-mouth; increasing profitability through higher customer life value; impacting sales growth and market share through improved customer attitudes toward brands, products, and customer satisfaction (Troilo et al., 2009).

In a 2006 study, Guenzi and Troilo showed increased interaction and collaboration between marketing and sales enhances the creation of superior customer value. Marketing and sales functions play a critical role in ensuring organizations deliver desired customer value; and an effective sales and marketing interface is an important determinant of how well the organization creates, delivers, and communicates its value proposition (Malshe, 2011).

Customer relationship management. Progressive sales organizations are becoming more strategic and are adopting a customer relationship management (CRM) approach focusing on the initiation, development, and enhancement of customer relationships (Biemans et al., 2010; Ingram, LaForge, & Leigh, 2002). CRM has become a core strategic business capability; customer-focused teams integrating all relevant business functions around a customer management strategy (Matthyssens & Johnston, 2006). Many customers are seeking suppliers who treat them as a single entity; providing consistent service across regions and countries (Borders, 2006).

According to Hughes et al. (2012), customer relationship management can reap many benefits, when fully executed. These may include: customer responsiveness; enhanced customer satisfaction and loyalty; as well as capturing and retaining high value customers; thereby increasing customer lifetime value, profit efficiency, and organization performance. CRM entails collecting vital customer information; storing and analyzing it; and customizing offerings and contact patterns that benefit the organization and customer (Hughes et al., 2012).

Customer focused integration practices. Aligning sales and marketing activities allows for efficiencies in customer management taking advantage of: geographic spread; cultural diversity; organizational complexity; need for global co-ordination; level of strategic involvement; global electronic-readiness; enhanced need for intra/extra-organizational and interdepartmental co-operation; and reliance on global "virtual" teams (Borders, 2006).

Customer linking capability suggests improvements can be developed with cross-functional marketing and sales coordination and information sharing that focuses on a common vision as to which customers to serve and which quality standards to provide (Guenzi & Troilo, 2006). Information exchange is paramount to their [marketing and sales] mutual success (Peppers, 2008). "Stop guessing and get all the team members (both departments) in front of the customer. Knock down the barriers and avoid the isolationist state," Peppers (2008, p. 5).

The main areas of common ground between sales and marketing usually focus on customers' activities and needs; pricing, promotional activities, new product development, and market research (Le Meunier-FitzHugh & Piercy, 2009). Effective exchange of information between the two functions is necessary to transform marketing strategies — designed to provide customers with the value they expect — into marketing programs that are consistently executed. The ability to create long-lasting relationships with customers depends on the consistency of marketing and sales strategies as well as objectives (Guenzi & Troilo, 2006; Strahle et al., 1996) and the coordination of communication and promotional investments/strategies (Cespedes, 1993).

According to sales managers, marketing managers should be more directly involved in client-oriented activities (Matthyssens & Johnston, 2006). Sales people view marketers' being accessible and approachable; especially when sales people are dealing with major accounts, as adding value to their efforts (Malshe, 2010). Engaging and managing the customer's experience requires targeted contacts with effective support from the right elements of the mix (Smith et al., 2006). In the ideal state, marketing becomes a sales multiplier. Sales becomes the confidant to marketing. Together they focus on what customers need and when they need it (Peppers, 2008). Marketing should be identifying and communicating with the most valuable customers and sales should be selling to them (Peppers, 2008).

Peppers (2008) outlines a customer-focused process, which entails planning, demand generation, opportunity management, offer delivery, order completion, purchase, and loyalty. Throughout this process marketing and sales work together to develop an end-to-end process and a common definition of the ideal customer. Sales closely communicates and collaborates with marketing, each requesting support materials and providing feedback. Both sales and marketing measure and track customer satisfaction and product usage, using this feedback to identify future opportunities with the customer, refine ongoing communication processes, identify purchase tendencies, and other key trends (Peppers, 2008).

Finally, a focus on creating value for customers must be accompanied by evaluation and compensation systems that encourage the desired behavior; with compensation based on customer satisfaction rather than a predetermined sales objective (Biemans & Brenčič, 2007).

Strategic planning. Alignments between organizational strategy and structure are thought to have significant impact on organizational performance (Barki & Pinsonneault, 2005). Sharing strategies and plans allows an organization to develop adaptive market learning, gaining efficiency and consistency in marketing decision-making, which brings about an improved ability to design a value proposition better able to satisfy customer expectations (Guenzi & Troilo, 2006).

Standard strategic plans include the following basic components: goals, objectives, tactics, effectiveness evaluation, timeline, and budget. When marketers create customized strategies, sales people see the value marketers bring to the table (Malshe, 2010). However, sales people expect their marketing colleagues to provide visible leadership and to display conviction about their strategies; they must be willing to fight for resources from top management (Malshe, 2010).

Joint planning**.** Cespedes (1993) suggested coordination between sales and marketing may be enhanced through joint marketing planning at both strategic and tactical levels. The sales force should no longer passively accept and execute plans from marketing (Shapiro, 2002). According to Malshe (2011), the sales function must be involved in developing the marketing strategy. Inclusive marketing planning allows staff to own the plan and facilitates effective implementation (Piercy, 2006). The sales and marketing organizations must synchronize their strategic and tactical activities so strategies create, deliver, and communicate superior customer value (Cespedes & Piercy, 1996; Guenzi & Troilo, 2007; Malshe & Sohi, 2009b). It is important for marketers to involve sales personnel in strategy creation activities and make concerted efforts to show them the bigger picture—how their ideas fit in the broader scheme of things (Malshe & Sohi, 2009a). When both marketing and sales functions collectively interpret market information, and try to make sense of their successes and failures, it provides a strong foundation for creating strategies (Malshe & Sohi, 2009b). According to Maltz and Kohli (2000), the sales force is instrumental in both the formation and implementation of strategic plans. Through their connection with the market, they are most aware of new developments from competitors and changing customer needs (Maltz & Kohli, 2000). Integration of sales people in marketing decision-making contributes to increased organizational effectiveness in solving customer problems and enhancing customer satisfaction (Guenzi & Troilo, 2006).

Both sales and marketing personnel feel when sales people are part of the strategy creation process, they feel more committed to it and buy into it (Malshe & Sohi, 2009a). A study by Biemans et al. (2010) found when marketing and sales have an equal stake in the creation and success of strategies and plans, they both want to contribute the best ideas and develop the best possible plans. When sales people are involved in strategy creation or strategy fine-tuning processes, the sales organization embraces new marketing initiatives easily, reducing acrimony and strengthening their connections with marketing (Malshe, 2011). Marketers may consider tying their fate with that of sales people through aligning goals and compensation for key strategies; doing so builds sales people's trust in marketers as well as their perceptions of them as credible partners (Malshe, 2010). It is imperative strategies have the blessings of the functional leadership, as well as individuals at each level within the sales and marketing functions taking ownership of the strategic process (Malshe, 2011).

Shared goals. To align activities, collaboration must be supported by aligned goals and integrative processes, and not just be based on close working relationships (Le Meunier-FitzHugh & Lane, 2009). Top management should consider programs that encourage departments to achieve goals collectively, have mutual understanding, work together informally, ascribe to the same vision, share ideas and resources (Le Meunier-Fitzhugh & Piercy, 2007b).

Successful marketing calls for establishment of well-defined goals, agreed upon by both sales and marketing, and make a significant contribution to the organization's success (Atteya, 2012). A singularly focused, well-aligned sales and marketing organization is focused on both short-term and long-term goals (Peppers, 2008). Research on team goal setting found mutual participation in establishing goals is critical for acceptance of goals and motivation toward achieving them (Rouziès et al., 2005). Goals help focus the energy of sales and marketing functions in a desired direction; reward and recognition contingent upon attainment of goals helps motivate their efforts to achieve goals (Rouziès et al., 2005).

Realistic group conflict theory (RCT), developed by Sherif in 1996, deals with causes and resolution of intergroup differentiation which is produced by conflicting goals (perceived or actual) or competition for scarce resources. The theory maintains intergroup differentiation is reduced by mutually desired super-ordinate goals, attainable only through intergroup cooperation (Dewsnap & Jobber, 2002). Sherif defined super-ordinate goals as those compelling for the groups involved, but cannot be achieved by a single group through its own efforts and resources (Dewsnap & Jobber, 2002). Dewsnap and Jobber (2002) proposed that an organization's overarching volume and profit goals could equate to superordinate goals for marketing and sales.

When both functions allow organizational goals to supersede their respective functional goals, such as achieving quarterly sales or gaining market share, it helps create a sense of interdependence between marketing and sales. Personnel engaged in extensive cooperation since their success depended on how well they carried out joint activities in the marketplace. A commitment to a common philosophy (i.e., achieving organizational objective) helps strengthen the connections (Malshe, 2011).

Focusing on higher level goals provides managers incentives to interact more with their colleagues (Maltz & Kohli, 2000). Leaders may try to enhance sales' and marketing's commitment to organizational goals and steer them away from thinking only about functional goals. Creating a team spirit so the two functions view each other as partners, and not obstacles in achieving objectives, should be a focus (Malshe, 2011). Kahn (1996) stated, "Top management should consider programs that encourage departments to achieve goals collectively, have mutual understanding, work informally together, ascribe to the same vision and share ideas and resources" (p. 147). Group goals and shared vision facilitate responsive and cooperative behaviors from managers in different organizational functions (Malshe, 2011).

To eliminate goal incongruities, management should provide clear goals for marketing [and sales] and explicitly align the goals and objectives for different departments (Song, Xie, & Dyer, 2000). Interdependence between different groups drives the need for integration

(Dewsnap & Jobber, 2002). Tjosvold (1988) suggests employees who believe their goals are cooperative interact effectively and make progress on their tasks (Malshe, 2011).

Shared objectives. Integration between sales and marketing is critical to the performance of both functions and the achievement of organizational objectives (Beverland et al., 2006). Objectives indicate how goals will be accomplished. When management provides clear objectives and appropriate organizational structures, it increases the chances that cross-functional efforts will succeed (Song et al., 2000). A commitment to macro-level objectives helps departments align their differences in orientations (short versus long-term, tactical versus strategic, or product versus customer orientation) and knowledge (product versus customer knowledge) in a productive way (Homburg & Jensen, 2007). An integrated organization will not succeed unless sales and marketing share responsibility for revenue objectives (Kotler et al., 2006).

Performance metrics. Organizations need to be metrics driven and have metrics that track both sales and marketing performance (Kotler et al., 2006); evaluating and rewarding both teams' performance based on shared important metrics (Kotler et al., 2006). Common metrics are critical when marketing is more embedded in the sales process and sales plays an active role in marketing (Kotler et al., 2006). Having fully integrated teams share performance metrics and rewards, as well as embedding marketers deeply in management of key accounts (Kotler et al., 2006), sales metrics are easier to define and track. Some of the most common measures are percentage of sales quota achieved, number of new customers, number of sales closings, average gross profit per customer, and sales expense to total sales. When marketers become embedded in the sales process—for example, as members of critical account teams—it is only logical to measure and reward their performance using sales metrics (Kotler et al., 2006).

Rewards. The purpose of the reward system is to align the goals of the employee with the goals of the organization, and to be successful, the focus of rewards must be compatible with the tasks and structures of the organization (Le Meunier-FitzHugh, et al., 2011). When sales and marketing are rewarded only for their own departmental performance, their rewards are not aligned (Le Meunier-FitzHugh et al., 2011).

The way in which leaders reward functions for achieving joint objectives, can positively impact relations between marketing and sales: reducing levels of perceived or actual intergroup conflict, in-group identification, intergroup differentiation, intergroup bias and mutual negative stereotyping, while simultaneously generating the willingness of personnel from the two groups to work more closely together (Dewsnap & Jobber, 2002).

Many scholars have suggested aligned rewards improve sales and marketing integration (Dewsnap & Jobber, 2000; Kotler et al., 2006; Le Meunier-FitzHugh, et al., 2011; Rouzies et al., 2005). Sales and marketing personnel are [typically] rewarded independently. To improve collaboration, an aligned reward structure may be advantageous. Incentive reward systems have been reported to have a positive effect on several dimensions of marketing integration with other functions (Rouziès et al., 2005); they should reduce inter-functional conflict and increase sales and marketing collaboration (Le Meunier-FitzHugh et al., 2011). Rewards aligned toward achieving organizational goals can help focus sales and marketing staff on collaborating with each other (Le Meunier-FitzHugh et al., 2011).

Some scholars recommend changing reward systems to reflect super-ordinate goals such as company profits or profits from a specific project. By doing this, it may be possible to better align the objectives of different functional managers (Le Meunier-FitzHugh et al., 2011). When departments set super-ordinate goals and their reward system recognizes joint performance (e.g., company profits), reward structures are aligned, and should in turn decrease inter-functional conflict and increase collaboration in the sales and marketing interface (Le Meunier-FitzHugh et al., 2011). When sales personnel are compensated for achieving a super-ordinate goal, such as increasing company profits, this provides an incentive to be more collaborative and further increase profitability (Le Meunier-FitzHugh et al., 2011). Kotler et al. (2006) suggested sales and marketing rewards should be aligned so they share responsibility for revenue objectives. Financial and non-financial rewards may motivate personnel in both marketing and sales (Atteya, 2012).

According to Le Meunier-FitzHugh et al. (2011), traditionally, sales is rewarded through a basic salary and commission (or bonuses) based on sales success rather than on achieving super-ordinate goals, and the most widely-used measure of sales effectiveness is still total sales volume. Few studies have examined how marketing personnel are rewarded, although most organizations reward marketing on the performance of their department in isolation from any other department's goals. Marketing personnel, for example, often receive bonuses for increases in market share, regardless of how it is achieved (Le Meunier-FitzHugh et al., 2011). The most commonly set target for marketing personnel is overall sales (not based on any particular sales campaign or activity, or success of advertising campaigns). Alternatively, marketing rewards may be linked to increasing profitability or the successful introduction of new products/brands, but they are seldom rewarded for helping to achieve specific sales targets. When sales and marketing are rewarded only for their own departmental performance, rewards are not aligned (Le Meunier-FitzHughet et al., 2011).

According to Strahle et al. (1996) management must make sure sales managers are not told to do one thing, yet rewarded for doing something else. Sales managers should be evaluated and rewarded for achieving overall strategic goals rather than just for meeting and/or exceeding sales volume targets. It is important sales people are evaluated and compensated not only for achieving sales volume goals, but also for their overall effectiveness in implementing product strategies (Strahle et al., 1996). Adapt remuneration so sales strategy is directed toward marketing strategy (Matthyssens & Johnston, 2006). Similarly, Strahle et al. (1996) strongly recommend sales bonus schemes be linked to implementing marketing strategy successfully. It is important to ensure rewards are matched to the achievement of the overall strategic goals rather than just for meeting and/or exceeding sales volume targets (Strahle et al., 1996). Goals help focus the energy of sales and marketing functions in a desired direction; reward and recognition contingent upon attainment of goals helps motivate accomplishment of those goals (Rouziès et al., 2005). If both groups are given rewards (in whatever form) to achieve the same goals, they are more likely to be motivated to cooperate and coordinate activities (Le Meunier-FitzHugh et al., 2011).

According to Le Meunier-FitzHugh et al. (2011), joint or aligned rewards help increase collaboration, because both groups [marketing and sales] feel a responsibility for the success or failure of a joint project. Part of the rewards and salary increases of the marketing and sales staff should be tied to their degree of collaboration (Atteya, 2012).

Organizational intelligence. Formalized organizational systems typically categorize intelligence into three categories: market (industry-related) intelligence, competitor intelligence, and customer intelligence. Effective organizational intelligence systems include: collection, analysis, and dissemination of data across the organization. Shared information about customer needs, and assessing new market segments, should include up-to-date intelligence on competitors' capabilities, products, and services (Le Meunier-FitzHugh & Lane, 2009). The critical effort should be on aligning activities and establishing mutual understanding; creating a joint marketing intelligence system, with underlying focus on improving effective communication and organizational learning (Le Meunier-FitzHugh & Piercy, 2009).

***Market intelligence*.** In today's business environment, success demands a market orientation that reflects an organization-wide generation of market intelligence, dissemination of this intelligence across disciplines, and responsiveness to it (Hughes et al., 2012; Jaworski & Kohli, 1993). Organizations that have highly integrated sales and marketing departments gather better quality marketing intelligence, than those that do not, and will be better at reacting to market dynamics by formulating and implementing effective strategic responses (Lyus et al., 2011). An organization's competitive advantage is increasingly reliant on using market intelligence effectively (Maltz & Kohli, 2000).

Market intelligence is important to both sales and marketing allowing them to focus their activities more efficiently on customers, relying on information from both functions to be effective; providing an opportunity for the development of organizational learning through information sharing (Le Meunier-FitzHugh & Piercy, 2007a). Improving market intelligence is beneficial to both marketing and sales, and they should therefore be motivated to develop this area together (Le Meunier-FitzHugh & Piercy, 2007a).

***Competitor intelligence*.** Competitor intelligence has been defined as activities by which an organization determines and understands its industry, identifies and understands its competitors, determines and understands their strengths and weaknesses and anticipates their moves (Le Meunier-FitzHugh & Piercy, 2006).

***Customer intelligence*.** Keeping an organization healthy starts with knowing the customer and recognizing opportunities that arise from that knowledge (Peppers, 2008). Increased customer knowledge can provide a framework through which organizations create superior value for customers as compared to their competitors, which should have a positive effect on business performance (Le Meunier-FitzHugh & Piercy, 2011). Both sales and marketing measure and track customer satisfaction and product usage, using feedback to identify future opportunities with the customer, refine ongoing communication processes, identify purchase tendencies and other key trends (Peppers, 2008). Both sales and marketing need a 360 degree view of the customer that allows them to identify the best potential prospects for most profitable customers and then align their strategy and programs accordingly (Peppers, 2008). When sales and marketing share those insights, they are well positioned (Peppers, 2008). Collective knowledge of different customer requirements reduces interdepartmental conflicts and empowers different organizational units and levels to more effectively meet interrelated customer needs (Troilo et al., 2009).

Intelligence systems. There is mounting evidence the use of information systems provides significant profit opportunities for organizations (Le Meunier-FitzHugh & Piercy, 2006).

An integrative market intelligence system provides a process where sales and marketing can collaborate for mutual benefit (Le Meunier-FitzHugh & Lane, 2009). A market intelligence system provides an opportunity for sales and marketing collaboration on an area relevant and beneficial to both (Le Meunier-FitzHugh & Lane, 2009). Developing market intelligence systems promotes bidirectional communication and consultation and influences communication (Le Meunier-FitzHugh & Piercy, 2007a). Market intelligence consists of three elements: collection, analysis, and dissemination. For an intelligence system to be effective all three elements should work in concert (Le Meunier-FitzHugh & Piercy, 2006). Up-to-date, accurate market intelligence is critical to ensuring an organization maintains and develops its competitive position in the marketplace (Le Meunier-FitzHugh & Piercy, 2006). An effective market intelligence system is an important element in creating market orientation and providing an activity upon which sales and marketing can collaborate (Le Meunier-FitzHugh & Lane, 2009).

***Intelligence process*.** Le Meunier-FitzHugh and Lane (2009) found an effective marketing intelligence process can have a considerable impact on improving the relationship between sales and marketing as well as driving a market orientation. Effective market intelligence gathering plays an increasingly important role in informing strategic decision making within a market orientated organization (Piercy & Lane, 2008). Effective integration between marketing and sales positively contributes to the generation and dissemination of marketing intelligence (Kohli & Jaworski, 1990) and to the creation of an organizational climate supportive of a learning orientation (Guenzi & Troilo, 2006).

The effective use of market and competitor intelligence and analysis may be more complex than is generally acknowledged (Le Meunier-FitzHugh & Piercy, 2006). The marketing function works to anticipate and learn needs and trends, develops a picture of the competitive arena, segments and targets markets, and develops strategies to position an organization in these segments. These are key to strong marketing and sales performance (Oliva, 2006). The involvement of more departments in marketing decisions facilitates both the dissemination of market intelligence across departments as well as the organizational responsiveness to it (Homburg & Pflesser, 2000; Jaworski & Kohli, 1993; Troilo et al., 2009).

Marketing is in a unique position to liaise across departments to foster learning about markets and help to develop shared vision (Cravens, 1998). Sales staff are also reliant on developing a learning orientation to allow them to respond appropriately to highly competitive environments and to develop customer relationships (Sujan, Weitz, & Kumar, 1994). The critical factor is both groups are experts in their fields and will benefit from sharing their expertise of product and market knowledge (Le Meunier-FitzHugh & Piercy, 2010).

LeMeunier-FitzHugh and Piercy (2006) suggest a sales organization must be valued as a crucial source of critical market intelligence. Inclusion of sales in market intelligence collection and dissemination processes is relevant to establishing collaboration and improving organizational performance (Le Meunier-FitzHugh & Piercy, 2009). Marketers view sales people as a valid source of short term individual customer information (Beverland et al., 2006). Interaction should result in successful sharing of information between the two functions and therefore, successful gathering of market intelligence (Lyus et al., 2011).

Getting on the same page and staying there requires powerful integration, collaboration and analytical solutions (Peppers, 2008). A unified understanding of the data driving the organization may help ensure a single version of the truth. The ability to look at data and collaborate on optimal actions based on insights, particularly in real-time, enables sales and marketing organizations to adapt to rapid marketplace changes and evolving customer wants and needs without abandoning the process. Access to consistent, accurate and rich customer data enables identification of key trends for effective cross-selling and up-selling (Peppers, 2008).

There is evidence an effective marketing intelligence process should include data from a number of sources, including the sales force, and the information derived from the system should be fed back to these sources (Le Meunier-FitzHugh & Lane, 2009). The effective exploitation of this intelligence requires information sharing between sales and marketing, and effective inter-functional coordination through collaboration (Le Meunier-FitzHugh & Piercy, 2011). Information sharing may be promoted through integrated market intelligence processes that allow sales and marketing to work together formally and informally (Le Meunier-FitzHugh & Piercy, 2007a). The sales force should play an active role in the management of market intelligence (Le Meunier-FitzHugh & Piercy, 2006).

It is recommended a single collection point be established within an organization, which would avoid the danger of information becoming 'trapped' within departments or divisions (Le Meunier-FitzHugh & Piercy, 2006). Effective coordination efforts between sales and marketing can reduce the total volume of information moving from point to point (Borders, 2006). The marketing department provides information from market research and dissemination of the information across the organization (Le Meunier-FitzHugh & Piercy, 2007a).

***Intelligence gathering*.** Marketing should provide information on market position, customer satisfaction and turnover, and return on investment (Matthyssens & Johnston, 2006).

Sales has the ability to provide information about customer needs and assessing new market segments, as well as up-to-date intelligence on competitors' capabilities, products and services (Le Meunier-FitzHugh & Piercy, 2006). The sales force is a key element in the collection of reliable market intelligence as they are at the customer interface, meet with competitors' representatives, and generally have their 'ear to the ground' about conditions in the market (Le Meunier-FitzHugh & Piercy, 2006). Collection of this information needs to be planned and the accuracy of the information should be verified (Le Meunier-FitzHugh & Piercy, 2006).

Sales managers think marketing should motivate sales people by making clear specific market information is essential and will be used effectively (Matthyssens & Johnston, 2006). Clear objectives and incentives should be set for the sales force; and, most importantly, they should be included in the dissemination of market intelligence for the organization to gain maximum benefit (Le Meunier-FitzHugh & Piercy, 2006).

***Intelligence distribution*.** Market intelligence cannot just be collected and stored; it must be valued, reviewed, analyzed and fed back across organizational boundaries (Le Meunier-FitzHugh & Piercy, 2006). Market information needs to be integrated and disseminated to both sales and marketing to facilitate the organization's adaptation to changing environments and contribute to greater sales and marketing effectiveness (Le Meunier-FitzHugh & Lane, 2009). Combining information from sales and marketing sources and disseminating it to both functions promotes collaboration and sharing (Jaworski & Kohli, 1993; Le Meunier-FitzHugh & Lane, 2009; Le Meunier-Fitzhugh & Piercy, 2007b). Feeding market intelligence to the sales force enables them to improve their activities and respond strategically to the marketplace, and they will be more likely to perform effectively if they understand how their information contributes to the organization's activities and feel their participation is valued (Le Meunier-FitzHugh & Piercy, 2006).

Demand generation. Oliva (2006) found the strongest [marketing and sales] practices, and those which seem to be producing the best (and most measurable) results, have well-defined processes for demand generation. Demand generation, based on a shared definition (between marketing and sales) of the ideal customer, requires marketing to drive awareness, which delivers leads to sales. Sales should then promptly follow-up with prospects within the pre-defined time limit (set with marketing). Marketing and sales should measure the quality of leads by the [previously] agreed upon definition and metrics (Peppers, 2008). When all levels within the sales and marketing hierarchy take ownership of the demand generation process, it facilitates the process of marketing-sales integration (Malshe, 2011).

***Lead generation*.** What constitutes a 'lead' seems to have great variability and has been a perennial favorite for creating a variety of good and bad transactions between marketing and sales people (Oliva, 2006). In many business to business marketing operations, the lead generation and handoff process is the key linkage between marketing and sales (Oliva, 2006).

According to Oliva (2006), best practice organizations hold the word 'lead' as sacrosanct – with a precise definition of what a qualified lead means (Figure 8), rooted deeply in the culture of the organization. Although the specifics defining a qualified lead varies from organization to organization, the important thing is marketing and sales people (within the same organization) both firmly agree what this means. A strong mutual understanding of exactly what a 'lead' is (by all team members) is crucial (Oliva, 2006).

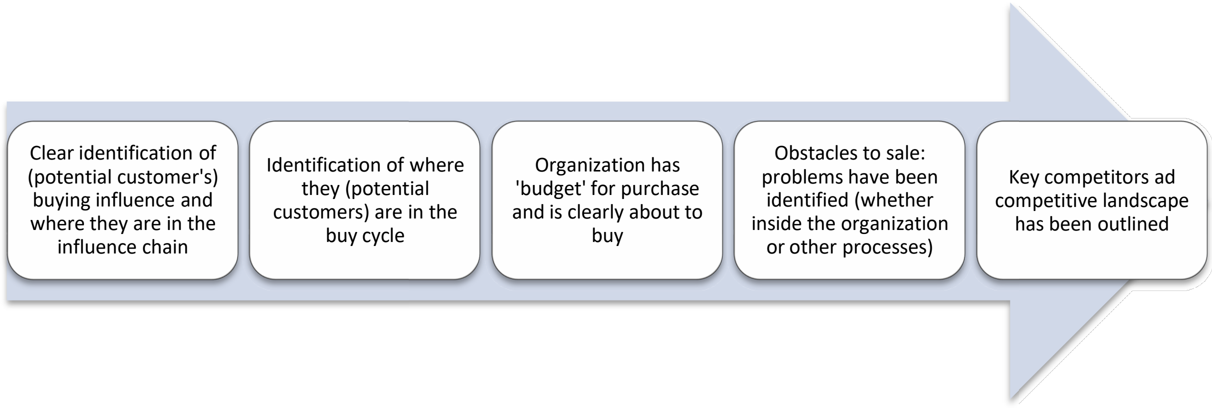


Figure 8. Defining characteristics of a 'fully qualified' lead (Olivia, 2006).

***Opportunity management*.** According to Peppers (2008), successfully managing potential opportunities to convert leads to actual customers, known as opportunity management, requires seamless integration between marketing and sales. Sales should initiate a conversation with the prospect to understand their business problems [opportunities] and create demand for the solution. Marketing should then provide sales tools/enablers to support the customer acquisition. Sales should follow-up by providing feedback on the effectiveness of the sale tools (Peppers, 2008). The team monitors customer feedback and uses it to refine ongoing communication processes as well as to identify purchase tendencies and other key trends. Both sales and marketing measure and track customer satisfaction and product usage and use feedback to identify future opportunities with the customer (Peppers, 2008).

Conclusion of Literature Review

Informed by the literature, the following practices for integrating marketing and sales have been identified and will be proposed to a panel of experts to determine 'best practices' for integrating marketing and sales: 1) communication (quality, multidirectional); 2) organizational knowledge (i.e. training, education; vision, mission, organization goals, products, services, etc.); 3) customer focus; 4) strategic planning (i.e., process and content); 5) performance metrics and rewards; 6) organizational intelligence (gathering and distributing: i.e., market, competitor, and customer); and 7) lead management.

Although some authors suggest addressing departmental structure and culture may help with integrating marketing and sales, they were not included as potential best practices for this study. Organizational structure and culture are very complex issues, which although important integration variables, are difficult to influence. The intention of this research is to determine best practices for integrating marketing and sales, regardless of potential cultural or structural impediments.

The proposed best practices to integrate marketing and sales, and the resulting benefits, are illustrated in (Figure 9). As indicated in the purple boxes, marketing and sales typically exist as separate functions, embracing distinct cultures, visions, and missions. Each functional group typically develops their own goals in a silo, as indicated by the green funnels. Agreeing on a shared vision and mission (indicated in yellow); driven from the top of the organization, can serve as a starting point for the two functions to work together and begin to integrate their work. This needs be followed by synchronizing goals (tied into organizational goals); followed by individual and functional performance metrics; leading to increased efficiency, effectiveness, customer satisfaction and ultimately revenue.

Best practices for integration are indicated in blue and green. Line weights (thicknesses) indicate the level of importance of each best practice object. Lighter weight (finer) lines are contributing factors to the thicker lined objects. The blue circles indicate the critical need for effective, multi-directional communication – which facilitates and enables business and integration success. Organizational knowledge, a core foundation for organizational success, is facilitated by effective communication; helping to bridge sales and marketing, fostering understanding of each others' roles, responsibilities, organizational vision, mission, brand, product and service offerings, etc. The dashed green circle indicates recommended customer focus, intended to drive customer satisfaction, resulting in increased revenue. Green indicates more tactical techniques tied to strategic planning and sales enablement. Strategic planning is key to business success, and must be fully integrated across the organization (including sales and marketing) to ensure optimal business performance. The strategic plan ultimately brings marketing and sales together; fully integrating to achieve customer satisfaction, efficiency and effectiveness, and increased revenue. Aligned goals are the first component of a strategic plan. Market, competitive, and customer intelligence; along with lead management, are key drivers for customer acquisition and sales; part of every successful marketing strategy, indicated by the circles intersecting with the strategic plan. Lastly, the top down three-dimensional cylindrical funneling represents bringing the entire process together, which is typically driven from the top (of the organization) down through departments, functions, and individuals.

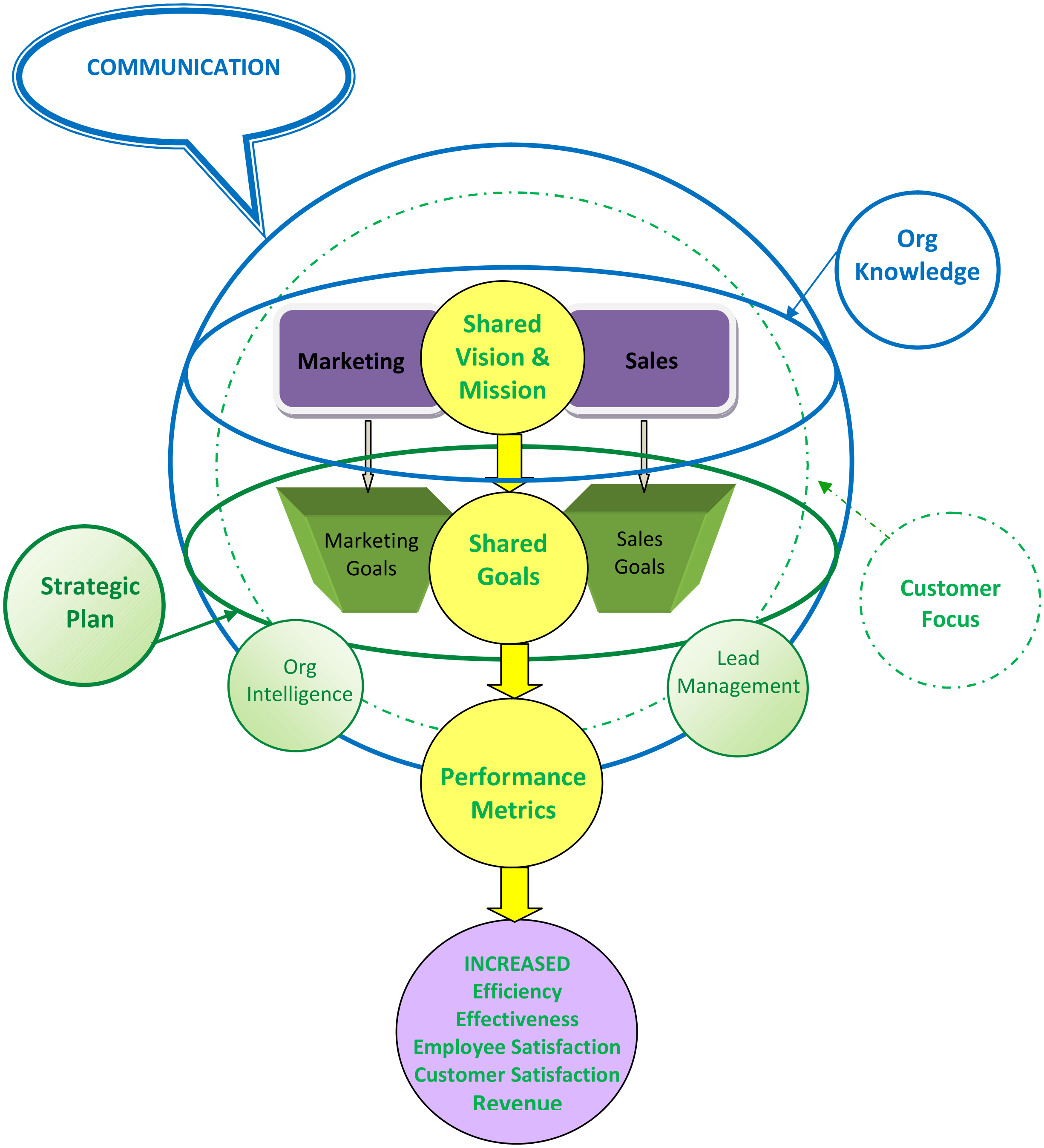


Figure 9. Proposed best practices for integrating marketing and sales in organizations.

CHAPTER 3: METHODOLOGY

Overview of Research Methodology

The purpose of this research is to determine best practices for integrating marketing and sales in organizations, using modified Delphi methodology. The Delphi method, also referred to as Delphi technique, was originally used as a forecasting technique based on the opinions of experts. Over 60 years, the Delphi method has continued to evolve and grow in usage. It is an iterative process to collect and distill anonymous judgments (*and opinions*) of experts using a series of data collection and analysis techniques interspersed with controlled feedback (Rowe & Wright, 1999). It is a flexible, adaptable research technique well suited when there is incomplete knowledge about a phenomenon. Typically classified as classical or modified (Kennedy, 2004), according to Skulmoski et al. (2007), there is no 'typical' Delphi. It is used for a variety of research areas including: identifying and validating problems; identifying, developing, and validating solutions; and forecasting. The goal of Delphi is to reach consensus or the least amount of disagreement.

There are several criteria to consider when conducting a Delphi study including: sample selection, expertise criteria, number of participants, initial questions, mode of interaction, number of rounds, level of consensus, rigor, validity and reliability (Goodman, 1987; Gupta & Clarke, 1996; Keeney, Hasson, & McKenna, 2006; Landeta, 2006; Murry Jr & Hammons, 1995). Key features of Delphi include: expert participants; anonymity; iteration and controlled feedback; as well as a goal to achieve consensus and/or the least amount of disagreement among experts.

Research Study Participants

Sample Selection

Purposeful sampling was used to identify heterogeneous expert participants for this study. Purposeful sampling, also known as judgment sampling, is a sampling technique in which the researcher actively selects the most productive sample to answer the research question (Marshall, 1996). Purposeful sampling is based on `the assumptions that a researcher's knowledge about the population can be used to handpick the participants to be included in the sample (Hasson et al., 2000). Potential participants were identified in the researcher's professional (business) network who have extensive experience in marketing, sales, and related fields, and asked to participate in this study. To ensure a representative sample, experts were selected based on years and level of experience in their respective fields, as well as number of organizations with which they have worked.

Expertise Criteria

Expertise is the desired criterion for sample selection and it is this feature which sets Delphi apart from other forms of survey research (Clayton, 1997). However, the question of how an expert is defined, and if expert opinion is distinguishable from that of anyone else, is largely unresolved (Goodman, 1987). According to Hill and Fowles (1975), expertise exists in various forms and, although it may be difficult to measure, there are general characteristics of individuals who, in a given context, demonstrate a level of wisdom, insight, theory, practice, experience, and analysis not common to all individuals. It is these individuals to whom the term 'expert' is assigned. Expertise implies the participants have more knowledge about the subject matter than most people, possess certain experiences, or are members in a relevant professional association (Hill & Fowles, 1975). Experts by definition are credible, influential sources, with high levels of knowledge (often combined with experience) on a given topic. Their influence may span a wide variety of industries, disciplines, practices, and geographic boundaries. Delphi participants bring a wide range of direct knowledge and experience to the decision-making processes and should be chosen for their credibility with the target audience and work in appropriate areas (Powell, 2003).

For the parameters of this study, expertise was defined as: practitioners who have a minimum of 30 years' experience in marketing, sales, and/or customer relationship management; having held senior level positions, working with a minimum of five organizations.

Sample Size and Identification

The literature is mixed about the optimal size for a Delphi panel. A review of Delphi studies makes it clear there is a wide variation in numbers of participants. The method is modified to the circumstances and research question(s) with panel sizes ranging from 4 to 170 'experts' (Skulmoski, Hartman, & Krahn, 2007).

Depending on the purpose of the study, the complexity, and the expertise required, the panel may be large or small; local, state, national, or international. Group size theory varies, but some general rules-of-thumb indicate 15-30 people for a homogeneous population – that is, experts with similar experience; and 5-10 people for a heterogeneous population – people with expertise on a particular topic but coming from different social/professional stratifications (Clayton, 1997). Powell (2003) noted research indicates heterogeneous groups, characterized by panel members with widely varying personalities and substantially different perspectives on a problem, produce a higher proportion of high-quality, highly acceptable solutions than homogeneous groups.

A heterogeneous sample of five business executive experts, with more than 30 years experience (each) in sales and marketing, in 40 different (collective) organizations, participated in this study (Table 7). Aligning with Powell (2003), these experts brought a wide range of direct knowledge and experience to the decision-making processes and were chosen for their perceived credibility with the target audience and work in appropriate areas.

The experts held a variety of sales and marketing related positions in a wide variety of organizations including: business-to-business and business-to-consumer environments; private, public, non-profit, start-up to Fortune 50 organizations; with national (United States) and world-wide geographic reach. Organizations spanned seven different industries including: technology, telecommunications, healthcare, finance, insurance, manufacturing, and professional services (Appendix B).

Table 7.
Sales and Marketing Executives Selected as Expert Participants for Study

Participant	**Focus**	**Years in Business**	**# of Organizations**
D. Perez	C-Level/Sales	33	9
J. Reinig	Sales/Customer Relationship Management	40	7
J. Vogel	Sales	34	5
M. Peters	Sales/Marketing	34	8
D. Brouwer	Marketing	30	11
Total			*(40)*

Expert participation solicitation. Experts were asked to participate in this study through an email request (Appendix C), and to sign a consent form (Appendix D), both of which were pre-approved by the Colorado State University Internal Review Board (IRB Protocol #16-6739HH).

Data Collection and Analysis

Opinions were solicited from five professional marketing and sales executive experts (with a minimum of 30 years' experience, with 40 different organizations) identified to participate in this study. Although the purpose of this study is to fill a gap in the research by determining best practices to integrate marketing and sales in organizations, the researcher took the opportunity to seek expert opinion on research published on potential barriers to marketing and sales integration as well. The study consisted of a thorough review of academic literature pertaining to marketing and sales integration, which informed the development of a structured questionnaire, used in round one interviews with experts. Input from experts during each Delphi round were aggregated, analyzed, and used to develop successive questionnaires fed back to the participants via email; until responses stabilized and best practices for integrating marketing and sales were identified (Figure 10).

Initial Questions

Informed by themes identified through a thorough review of the literature (as examined in Chapter Two), a questionnaire was developed to help structure input from expert participants for this study. Some modified versions of Delphi dispense with the open-ended questionnaire, typical of classical Delphi, and begin the process with a structured questionnaire (Murry Jr & Hammons, 1995), drawn on the literature (Powell, 2003), providing pre-existing information for ranking or response in round one (Hasson et al., 2000). To help structured debate, Delphi technique can be used in conjunction with literature reviews and/or meta-analysis (Hasson et al., 2000). Themes are translated into a structured questionnaire that forms the basis of the following rounds (Landeta, 2006). The round one structured questionnaire focused on the following themes (Appendix E):

1. Communication
2. Customer Focus
3. Organizational Knowledge
4. Role Clarity
5. Strategic Planning
6. Performance Metrics
7. Rewards
8. Organizational Intelligence
9. Lead Management

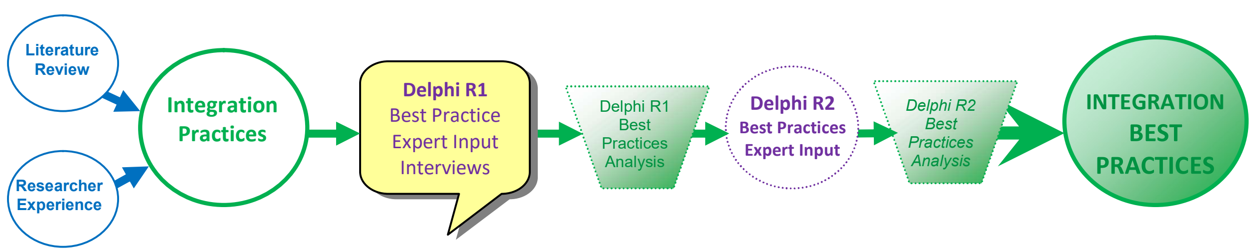


Figure 10. Representation of Delphi research methodology used to determine and validate best practices for integrating marketing and sales.

Mode of Interaction

Guided by the structured questionnaire, experts were personally interviewed in round one, followed by successive rounds of email until responses stabilized. Ensuring anonymity of expert participants, the researcher served as the study coordinator and facilitator; keeping participants informed and providing opportunity (to experts) for controlled feedback on relevant data.

The Delphi process is intended to maintain the anonymity of the participants or at least of their answers, which should go directly to the group coordinator (Landeta, 2006). Anonymity allows participants to freely express their opinions without undue social pressures to conform to others in the group. Decisions are evaluated on their merit, rather than who has proposed the idea (Rowe & Wright, 1999). The exchange of information between the experts is not free but is carried out by means of a study group coordinator, so all irrelevant information is eliminated (Landeta, 2006).

Rounds

The number of rounds in Delphi studies varies, but typically range from one to three. The goal is to stabilize responses; reaching consensus, or the least amount of disagreement. This study consisted of three rounds of expert input; after which responses stabilized and consensus was reached on some practices.

Iteration and controlled feedback. Iteration with controlled feedback is historically achieved in Delphi studies through the use of successive questionnaires. Iteration allows participants to refine their views in light of the progress of the group's work from round to round (Rowe & Wright, 1999). Controlled feedback informs the participants of the other participants' perspectives and provides the opportunity for participants to clarify or change their views (Rowe & Wright, 1999). Information gathered in the first round is incorporated into subsequent questionnaires so all study participants can be kept informed of the current status of the collective group opinion (Goodman, 1987). It is through this essentially democratic process the Delphi technique aims to facilitate a group opinion or judgment that is representative (Goodman, 1987).

Delphi round 1: Round one consisted of personal interviews, with five professional marketing and sales executive experts. Utilizing a modified Delphi technique, a structured questionnaire, informed by the literature review, was used to guide the interviews (Hasson et al., 2000; Murry Jr & Hammons, 1995). Four of the five interviews were conducted face-to-face. The fifth interview was conducted via telephone.

As indicated above, although the focus of this study is to determine best practices to integrate marketing and sales in organizations, the questionnaire also asked for expert opinion on potential barriers to marketing and sales published in academic literature. Using a five point Likert scale (with 1 being not at all to 5 being extremely), experts were asked how often barriers impacted integration. Experts were asked to rate the importance of best practices to integrate marketing and sales, using a five-point Likert scale (with 1 being not at all to 5 being extremely). Expert participants were provided the opportunity to add barriers and best practices (not already identified), via open ended questions. The round one questionnaire evolved around nine themes, consisted of 20 items, and two open-ended questions (Appendix E).

Round 1: Statistical aggregation of responses. Questionnaire responses from experts were processed, identifying and grouping responses based on rating of each barrier and best practice identified. Excel spreadsheets were developed, tabulating ratings given by each expert to every question; as well as additional barriers to (Appendix F) and/or best practices for (Appendix G) integration mentioned by experts, allowing themes to be identified. Aggregation of responses allows for a quantitative analysis and interpretation of data (Rowe & Wright, 1999).

As shown in Chapter Four, bar charts were developed to portray a graphic representation of responses (Figures 11-35). Graphical representation and the textual presentation of statistical results have been used to report findings in Delphi studies (Hasson, Keeney, & McKenna, 2000).

As discussed in Chapter Four, responses in reference to perceived barriers to marketing and sales integration were consistent with the findings indicated in the literature, as highlighted in Chapter Two, expressing a wide range of disagreement on the barriers that create or cause conflict between marketing and sales; as well as the impact such barriers have on integrating marketing and sales. Consequently, to manage the scope of this study, reiterating the primary purpose is to fill a gap in the research by determining best practices to integrate marketing and sales in organizations, no further data were collected and/or analyzed on perceived barriers in subsequent rounds.

Delphi round 2: A PowerPoint presentation, which included a summary of round one best practice results as well as a new questionnaire, was developed and emailed to expert participants for round two (Appendix H). Bar charts were created (and included in the questionnaire), which indicated individual responses to each question in round one, providing experts the opportunity to see their individual responses compared to other participant responses. To ensure anonymity, participants were identified by initials only.

Based on a five point Likert scale, the round two questionnaire included all original items, as well as new items suggested by experts in round one. Questions were re-arranged and grouped by level of consensus; beginning with items rated identically by all experts; followed by remaining items to which there was less agreement; followed by additional items suggested in round one. The round two questionnaire consisted of nine original items (informed by literature), as well as five additional items suggested by expert participants.

Controlling the feedback, participants were asked to view round one results, complete the new round two questions, and return the PowerPoint presentations with their answers (recorded and saved) to the study coordinator/researcher via email. This process provided experts the opportunity to change their answers based on group responses, while maintaining anonymity of each participant. Controlled feedback informs the participants of the other participants' perspectives and provides the opportunity for participants to clarify or change their views (Rowe & Wright, 1999). Information fed back to participants from their responses to questionnaires is often provided as statistical summaries (of the group's views) of specific items. Participants should be given an indication of where their scores placed in relation to the group's (Landeta, 2006). The opportunity to revise previous responses in light of this is an important element in the move towards consensus (Powell, 2003).

Five days after the questionnaire was sent, reminder emails were sent to participants. All questionnaires were completed and returned within seven days.

Delphi round 2: Statistical aggregation of responses. Questionnaire responses from experts were processed, identifying and grouping responses based on ratings of each best practice identified. An Excel spreadsheet was developed, tabulating ratings given by each expert to every question in both completed rounds (Appendix I).

Delphi round 3: A PowerPoint presentation, which included a summary of round one and two best practice results, as well as a new questionnaire, was developed and emailed to participants for round three (Appendix J). Bar charts were developed (and included in the questionnaire) to portray a graphic representation of responses, to each item, in both rounds of data collection, to allow experts to view the group's responses to items in each round, as well as changes in ratings that may have occurred – comparing their responses to that of the group's. The five items which reached consensus (in the previous two rounds) were not included in the bar charts in round three. To ensure anonymity, participants were identified by initials.

Based on a five point Likert scale, the round three questionnaire included only items that had not yet stabilized. The five items on which consensus had been reached in the two previous rounds, were not included on the round three questionnaire. The round three questionnaire consisted of four items from the original questionnaire which did not reach consensus, as well as the five items suggested by experts (in round one) which were rated by experts for the first time in round two.

Controlling the feedback, experts were asked to view round one and two results, complete the new round three questions, and return the PowerPoint presentation with their answers (recorded and saved) via email. This process provided experts the opportunity to change their answers based on group responses, while maintaining anonymity of each participant.

Four of the five round three questionnaires were returned within 24 hours. Five days after the questionnaire was sent, an email reminder was sent to the participant whom had not yet responded. All questionnaires were completed and returned within seven days.

Delphi round 3: Statistical aggregation of responses. Questionnaire responses were processed, identifying and grouping responses based on ratings of each best practice identified. An Excel spreadsheet was developed, tabulating ratings given by each expert to every question in all three rounds (Appendix K). Bar charts were developed to represent responses to each item in all three rounds of data collection (Figures 22-35). The Excel spreadsheet and bar charts provided the opportunity to view responses to each item, by each participant, in each round, as well as any change in ratings that may have occurred in each round; providing the opportunity to compare and contrast data in each round, as well as influence the group may have had on individual responses in each.

Level of Consensus

Modified Delphi suggests data collection can stop after either consensus or stability of responses has been achieved (Murry Jr & Hammons, 1995); minimal amount of disagreement is all that is required. Stability or convergence is reached when it becomes apparent further shifting of positions is not likely (Murry Jr & Hammons, 1995). According to Gupta and Clarke (1996), Delphi's goal is NOT to elicit a single answer or to arrive at consensus; but to obtain as many high quality responses and opinions from a panel of experts as possible, on a given issue(s), to enhance decision making. It took three rounds of data collection for responses to stabilize in this study.

Rigor

According to Thomas and Magilvy (2011), rigor is defined as the quality of being extremely thorough, exhaustive, or accurate. It is useful for establishing consistency of the study methods over time and provides an accurate representation of the sample studied. Rigor provides a means to replicate a study with a different research sample (Thomas & Magilvy, 2011). Morse, Barrett, Mayan, Olson, and Spiers (2002) define rigor in terms of verification mechanisms to ensure reliability and validity. Verification strategies help the researcher identify when to continue, stop, or modify the research process in order to achieve reliability and validity, and ensure rigor.

> Verification is the process of checking, confirming, making sure, and being certain. In qualitative research, verification refers to the mechanisms used during the process of research to incrementally contribute to ensuring reliability and validity and thus, the rigor of the study, (Barrett et al., 2011, p. 17).

According to Powell (2003), many Delphi methodologists reject conventional scientific criteria for rigor, suggesting alternative means of demonstrating the merit of the findings, such as the collective term goodness criteria. Goodness criteria rest on the justification of detailed decision-making and rigor in the execution of the study (Powell, 2003). Of key importance is the inclusion of a clear decision trail that defends the appropriateness of the method to address the problem selected, choice of expert panel, data collection procedures, identification of justifiable consensus levels, and means of dissemination and implementation. A research timeline was developed to provide detail of the study process and procedures (Appendix L).

The Delphi method was the best and most appropriate method to address an ongoing (well documented) problem of integrating marketing and sales. Using the Delphi method, provided an approach to determine the best practices to integrate marketing and sales through the iterative rounds of questionnaires, as well as anonymous, controlled feedback. The panel of marketing and sales executive practitioners (each of whom had a minimum of 30 years' experience with 40 different organizations), have the experience and knowledge to provide valuable opinions on best practices to integrate marketing and sales in organizations. In round one, data were collected during interviews with experts, guided by a questionnaire built on themes identified through a review of the literature. To maintain the rigor of Delphi technique, in 1998, Sumsion suggested the need for a response rate (from participants) of 70 percent for each round (Hasson et al., 2000). There was a participant response rate of 100 percent throughout all rounds of this study.

Reliability

Delphi is considered a reliable research method with potential for use in problem solving, decision making, and group consensus (Murry Jr & Hammons, 1995). Validity and reliability can be increased when methodology decisions and research techniques are determined in advance such as: expertise criteria, number of rounds, and level of consensus.

The Delphi method offers reliability and generalizability of outcomes, ensured through iteration of rounds for data collection and analysis, guided by the principles of democratic participation and anonymity (Day & Bobeva, 2005). Iteration allows participants to refine their views in light of the progress of the group's work from round to round (Rowe & Wright, 1999). It is through this essentially democratic process that the Delphi technique aims to facilitate a group opinion or judgment that can claim to be representative (Goodman, 1987). Data collection continued for three rounds, until responses stabilized; consensus (or the least amount of disagreement) was reached.

Validity

When the component skills of professional effectiveness are an objective of the research, the use of consultative methods like the Delphi technique improve the validity of the study from two aspects. First, the skills identified have high face validity. Second, when agreement is reached, it can be argued there is evidence of concurrent validity, in that the experts themselves have both identified and agreed upon, the ideas/opinions (Williams & Webb, 1994). If the panelists participating in the study can be shown to be representative of the group or area of knowledge under study then content validity can be assumed (Goodman, 1987). Additionally, decisions are more valid if the group is comprised of experts and group decisions are usually considered more valid than decisions made by a single person (Murry Jr & Hammons, 1995). Participants who have knowledge and an interest in the topic may help to increase the content validity of the Delphi (Goodman, 1987) and the use of successive rounds of the questionnaire helps to increase the concurrent validity.

Expertise. The Delphi does not call for expert panels to be representative samples for statistical purposes. Representativeness is assessed on the qualities of the expert panel rather than its numbers (Powell, 2003). Expertise, another component of the credibility construct, refers to the perceived level of contextually relevant knowledge of the source (Malshe, 2010). Extant research suggests the receiver's perception that the source possesses higher levels of expert power enhances the source's trustworthiness (and thereby credibility) in the eyes of the receiver (Malshe, 2010; Moorman, Deshpande, & Zaltman, 1993; Palmatier, Miao, & Fang, 2007).

To ensure validity, a heterogeneous sample of five executives was asked to participate as expert panelists in the study. The experts selected have extensive experience as marketing and sales executives; in 40 different organizations; in business-to-business, and business-to-consumer environments; private, public, non-profit, start-up to Fortune 50 organizations; with national (United States) and world-wide geographic reach. The organizations span seven industries including: technology, telecommunication, healthcare, finance, insurance, manufacturing, and professional services. Therefore, the sample may be considered valid and representative of professional marketing and sales experts.

CHAPTER 4: RESULTS AND FINDINGS

The primary purpose of this research was to determine best practices for integrating marketing and sales in organizations. Based on a thorough review of literature, barriers to, as well as practices for, integrating marketing and sales were identified and presented to expert participants for rating using the Delphi technique. Responses in reference to perceived barriers to marketing and sales integration in round one, were consistent with the findings in the literature, as indicated in Chapter Two, expressing a wide range of disagreement on the barriers that create or cause conflict between marketing and sales; as well as the impact such barriers have on integrating marketing and sales. Consequently, rounds two and three focused on determining best practices for integrating marketing and sales in organizations; resulting in the 11 best practices being rated as important by experts including: communication, a customer focus, strategic planning, clearly defined roles and responsibilities, performance metrics, aligned rewards, organizational knowledge, training and education, organizational intelligence, and lead management.

Delphi Round One Results

As discussed in Chapter Three, a purposeful, heterogeneous sample of five experts, with a minimum of 30 years' experience, with 40 organizations, spanning seven industries (Appendix B), were asked to participate. Participation of 100 percent was maintained throughout this study. Round one consisted of personal interviews, guided by a structured questionnaire (Appendix E) based on a five point Likert scale. Four of the five interviews were conducted in person, and one (due to geographic distance), was conducted over the phone. All interviews were recorded and guided by a questionnaire based on a five point Likert scale, ranging from “1 – not at all” to “5 – extremely”.

Barriers to Integrating Marketing and Sales

Expert responses in reference to perceived barriers to marketing and sales integration were consistent with the findings indicated in the literature, as highlighted in Chapter Two, expressing a range of agreement. The literature revealed there is little agreement on the barriers that create or cause conflict between marketing and sales as well as the impact such barriers have on integrating marketing and sales.

Experts were asked how often nine variables were considered barriers to marketing and sales integration; ranging from not at all (1) to extremely often (5). Experts indicated the highest level of agreement on poor communication which received two 5’s and three 4’s (Figure 11); lack of clearly defined roles, responsibilities, and expectations (role ambiguity) (Figure 14), and lack of performance metrics (Figure 17) both of which received three 5’s and two 4’s. Experts indicated a wide range of agreement of the remaining six barriers: lack of a customer focus received two 5’s, two 4’s, and one 2 (Figure 12); lack of awareness and understanding of organizational knowledge received two 5’s, one 4, and two 3’s (Figure 13); lack of strategic planning received two 5’s, two 4’s, and one 3 (Figure 15); the strategic planning process received two 4’s, two 3’s, and one 2 (Figure 16); rewards that are not shared and/or aligned received three 5’s, one 4, and one 2 (Figure 18); lack of market, customer and competitive intelligence received one 5, three 4’s, and one 3 (Figure 19); intelligence gathering and distribution processes received one 5, two 4’s, and two 2’s (Figure 20); and lead management received one 5, three 4’s, and one 3 (Figure 21).

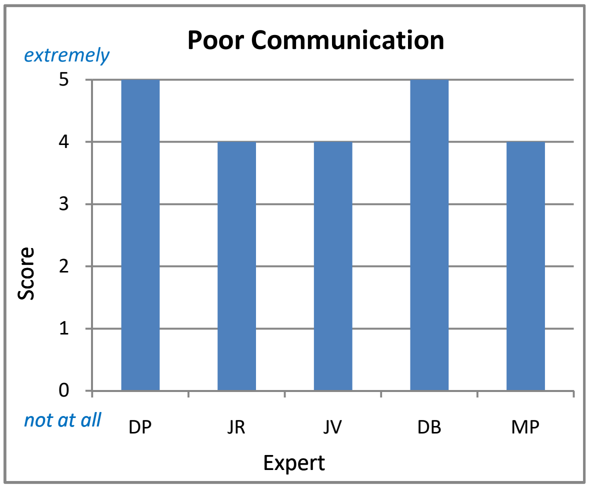


Figure 11. Poor communication is often a barrier between marketing and sales.

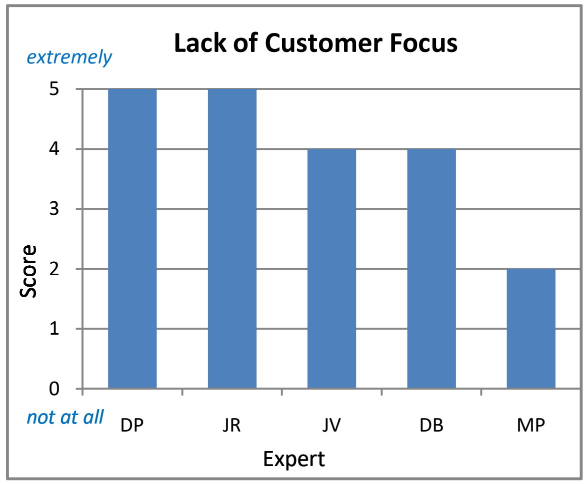


Figure 12. Lack of a customer focus (by both marketing and sales) is often a barrier between marketing and sales.

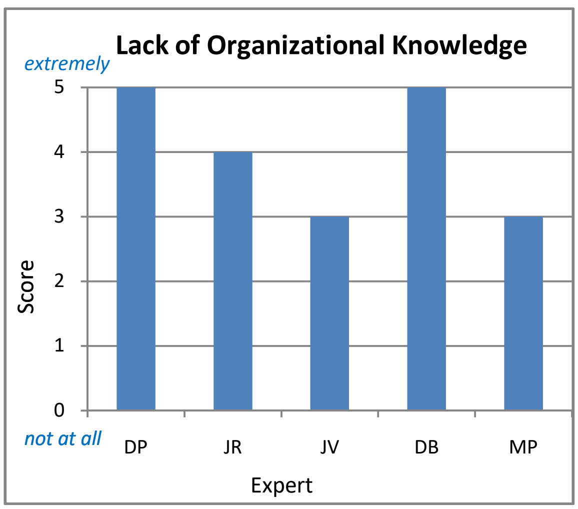


Figure 13. Lack of awareness and understanding of organizational knowledge (by both marketing and sales) is often a barrier between marketing sales.

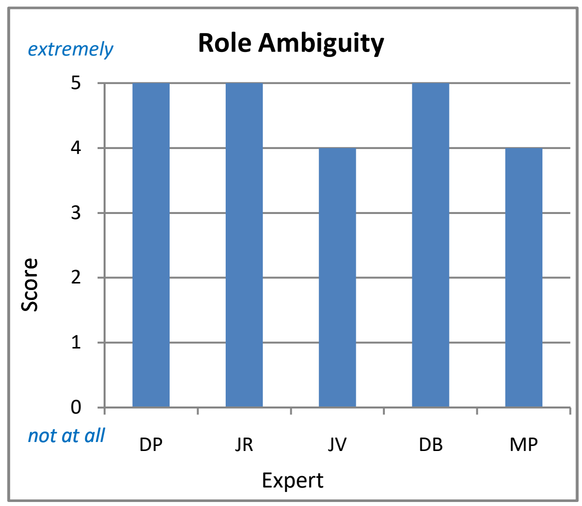


Figure 14. Lack of clearly defined roles, responsibilities, and expectations of marketing and sales, are often barriers between marketing and sales.

Figure 15. Lack of strategic planning (by both marketing and sales) is often a barrier between marketing and sales.

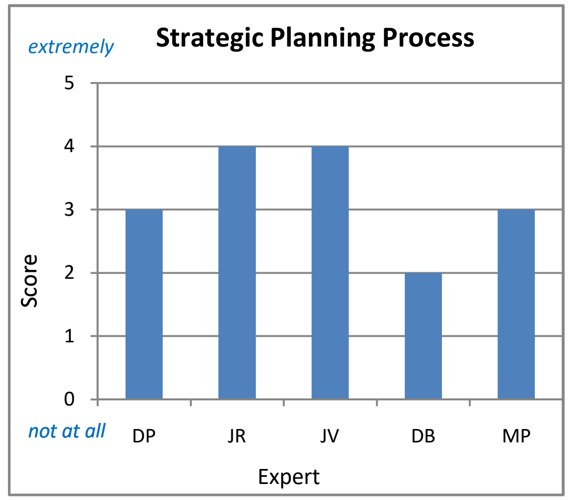


Figure 16. The strategic planning process is often a barrier between marketing and sales.

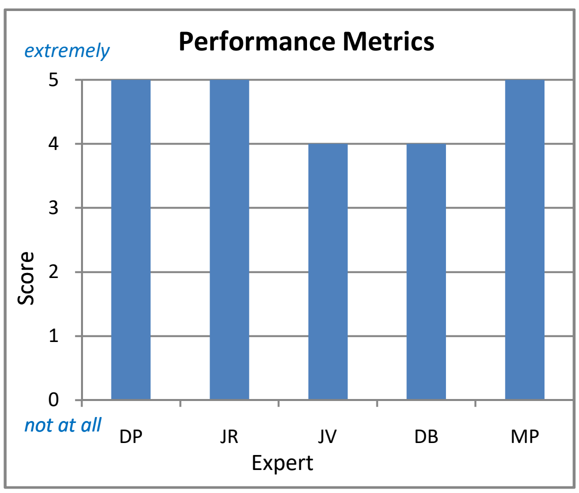


Figure 17. Lack of performance metrics (for both marketing and sales) are often barriers between marketing and sales.

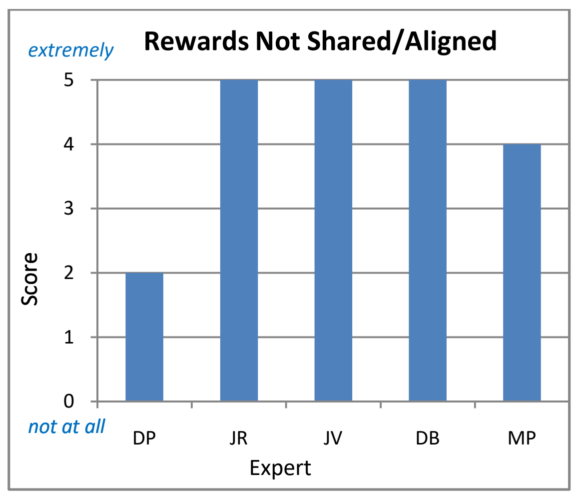


Figure 18. Rewards that are not shared and/or aligned often create barriers between marketing and sales.

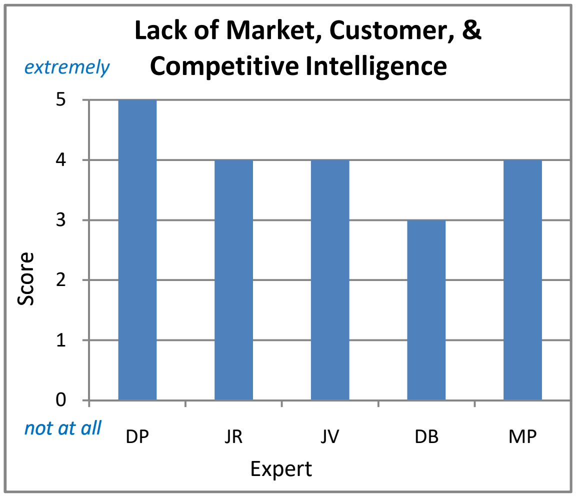


Figure 19. Lack of market, customer and competitive intelligence is often a barrier between marketing and sales.

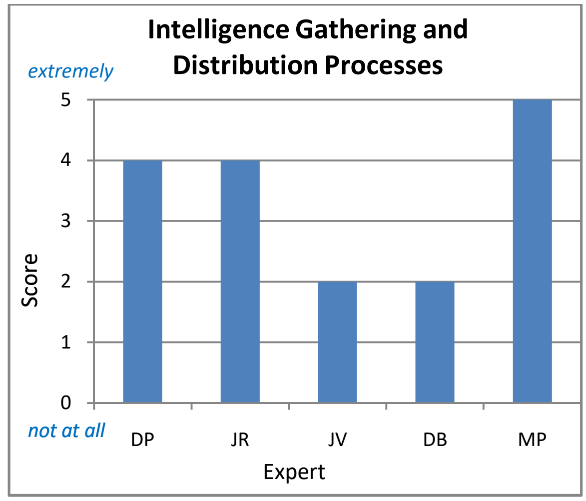


Figure 20. Intelligence gathering and distribution processes are often barriers between marketing and sales.

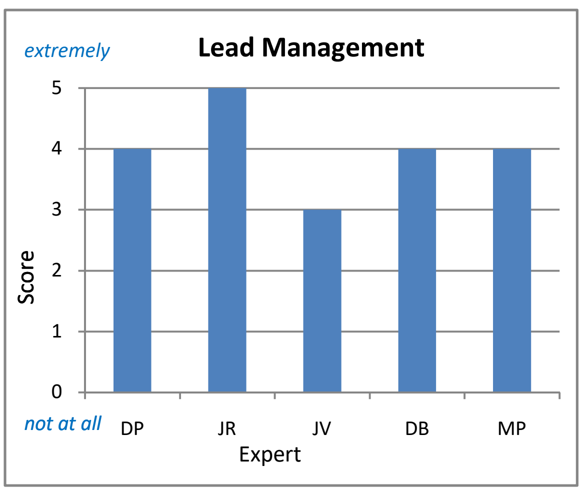


Figure 21: Lead management is often a barrier between marketing and sales.

Expert suggested barriers. When asked (as an open-ended question) if there are any other barriers to integrating marketing and sales experts suggested: capacity planning and project management, lack of trust and confidence in other's work, lack of effort, common language/terminology, culture, and leadership styles.

Capacity planning and project management is a potential barrier that could be solved by implementing strategic planning as a best practice. Lack of trust and confidence in each other's work, as well as lack of effort, are potential barriers that could be alleviated through several proposed best practices including: strategic planning, defined roles and responsibilities, and shared rewards. Common language and terminology is a component of organizational knowledge which has also been suggested as a best practice. Culture and leadership styles and are both potentially significant variables that were identified in the literature, but due to the complexity and depth of each of these issues, is beyond the scope of this study (Table 8). Many academic studies exist on cultural analysis and alignment, which this researcher agrees provides significant value in marketing and sales integration. Additionally, leadership styles have a significant impact on organizational alignment, culture, and integration effectiveness. However, due the plethora of research published on culture and leadership, further exploration of these issues in reference to marketing and sales integration is beyond the scope of this study.

Table 8.
Expert Suggested Barriers to Marketing and Sales Integration.

Expert Suggested Barrier	**Corresponding Best Practice(s)**
Capacity planning and project management	strategic planning
Lack of trust and confidence in each other's work	strategic planning, defined roles and responsibilities, shared rewards
Lack of effort	strategic planning, defined roles and responsibilities, shared rewards
Common language and terminology	organizational knowledge
(beyond scope of study)	
Leadership styles	transformational, developmental, charismatic, transactional, servant, etc.,
Culture	cultural analysis and alignment

To manage the scope of this study, reiterating the primary purpose is to fill a gap in the research by determining best practices for integrating marketing and sales in organizations, no further data was collected and/or analyzed on perceived barriers to marketing and sales integration.

Best Practices for Integrating Marketing and Sales

Based on a five point Likert scale questionnaire, informed by themes identified in the literature, experts were asked the importance of nine different best practices when integrating marketing and sales in organizations; ranging from not at all important (1) to extremely important (5) (Appendix E). Experts indicated complete agreement on three best practices in round one, rating all extremely important (5): communication (Figure 22); clearly defined roles, responsibilities, and expectations (Figure 23); and performance metrics (Figure 24).

Experts indicated minimal differences in importance (four out of five participants rating the following best practices for integrating marketing and sales in organizations as extremely important (5): a customer focus (Figure 25), strategic planning (Figure 26), and organizational knowledge (Figure 27).

There was less agreement by experts on the importance of aligned rewards (Figure 28), and lead management (Figure 29), with three of five experts rating both best practices as extremely important (5), while each of the other two experts assigned different ratings for each best practice. Experts expressed the least amount of agreement on the importance of gathering and distributing intelligence; indicating four different rating values (Figure 30).

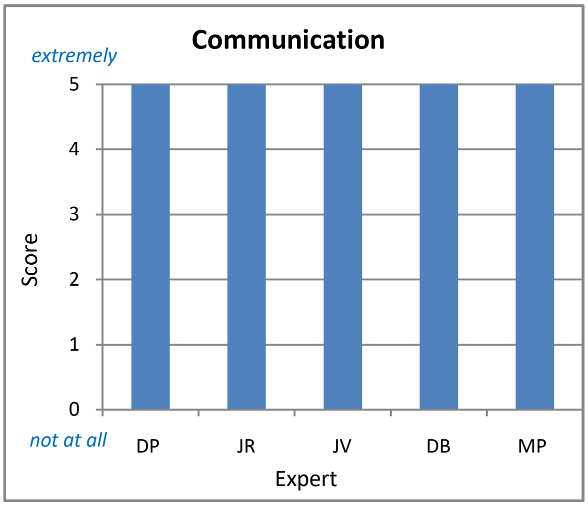


Figure 22. Communication (consistent, high-quality, multidirectional) between marketing and sales is important for integration.

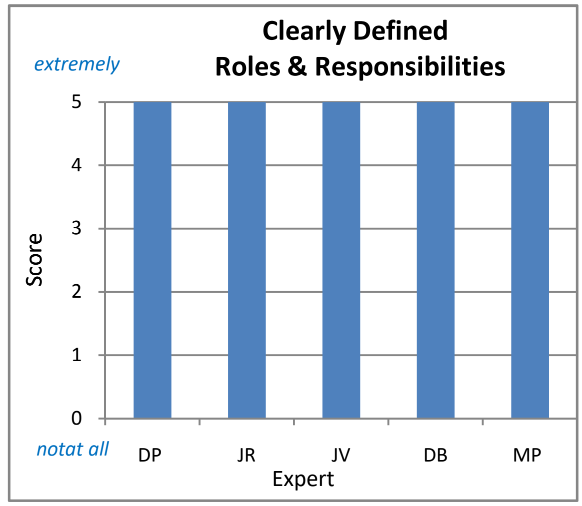


Figure 23. Clarifying roles (functional and individual), responsibilities, and expectations of marketing and sales is important for integration.

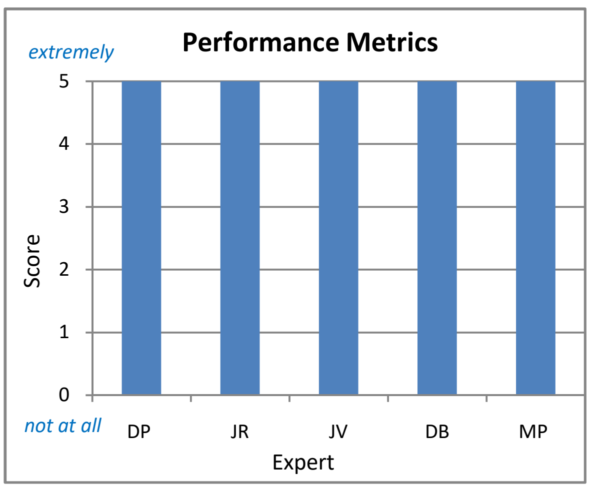


Figure 24. Performance metrics for marketing and sales (individuals and teams) are important for integration.

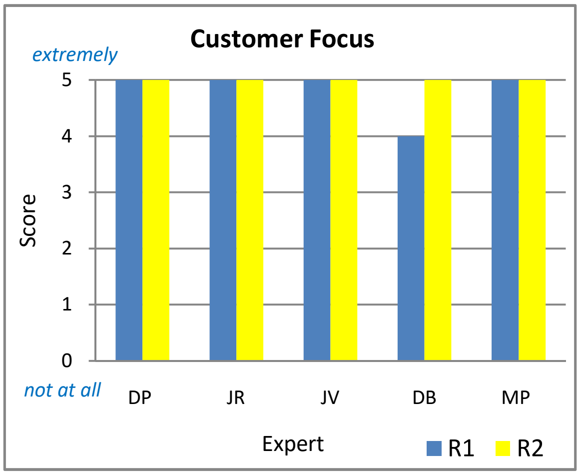


Figure 25: A customer focus (by both marketing and sales) is important for integration.

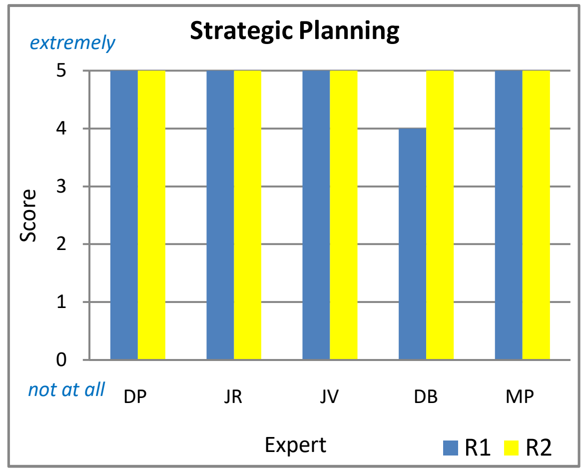


Figure 26. Strategic planning (developing and executing strategies i.e. goals, objectives, tactics, timeline, effectiveness evaluation, and budget) is important for integration.

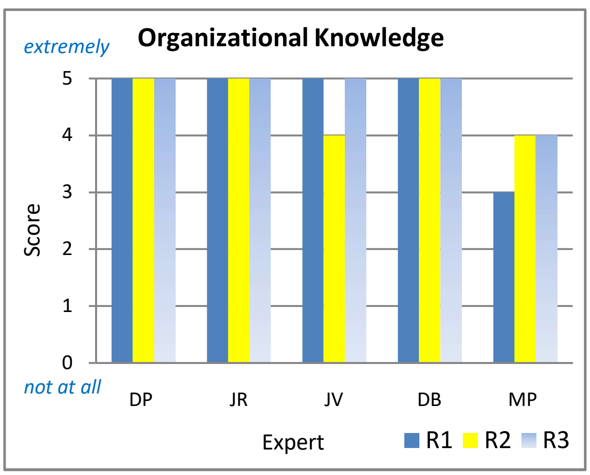


Figure 27. Organizational knowledge (awareness and understanding of vision, mission, goals, objectives, product and service offerings, key differentiators, and performance metrics of 'the organization', etc.) by marketing and sales is important for integration.

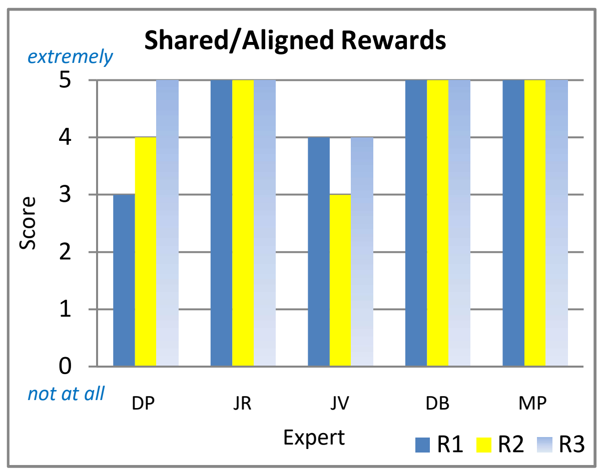


Figure 28. Shared and/or aligned rewards for marketing and sales accomplishments are important for integration.

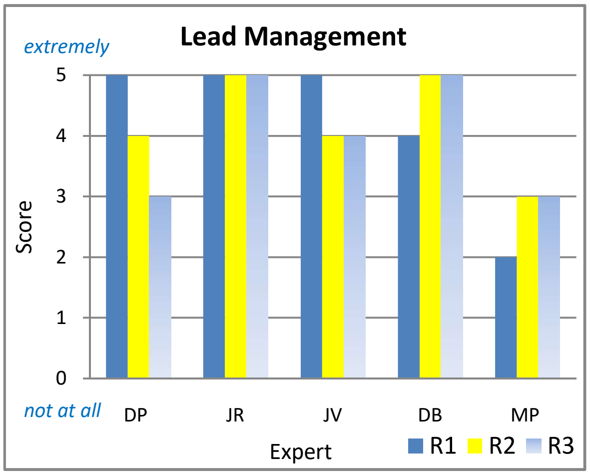


Figure 29. Lead management (generating, qualifying, and follow-up) is important for integration.

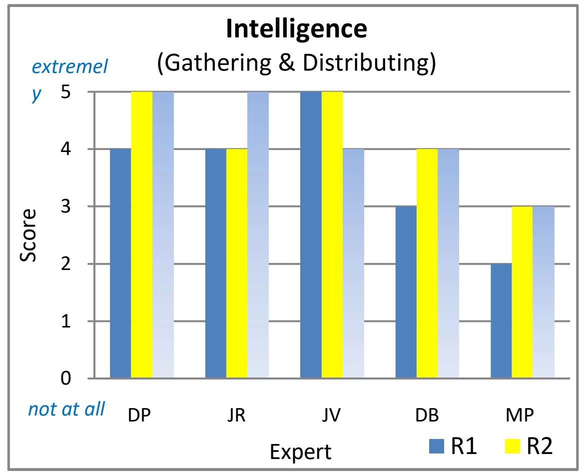


Figure 30. Gathering and distributing intelligence (market, customer, and competitive) is important for integration.

Expert suggested best practices. When asked (as an open-ended question) if there are other items which should be considered as best practices to integrate marketing and sales (which were not listed) experts suggested the need for: a clear and compelling vision of future; training and education; training and regulatory compliance; shared technology platforms and appointment setting processes; and that sales should report to marketing (Table 9).

Vision and mission were already included in the organizational knowledge question asked on the structured questionnaire. It was intended (by the researcher) that training was a component of organizational knowledge, this was not made clear in the initial questionnaire, therefore this item was added to the questionnaire for round two. Shared technology platforms and appointment setting process could also be considered a component of organizational knowledge, however again, was not specified in the round one questionnaire. Therefore, this was added to the questionnaire as a potential best practice in round two. Finally, although an integrated structure was mentioned in the literature review, there was little agreement on the need or value of integrating marketing and sales into the same reporting structure. Consequently, although a question on reporting structure was not included in the original round one questionnaire, it was added to the round two questionnaire.

Table 9.
Expert Suggested Best Practices for Integrating Marketing and Sales

Expert Additions	Best Practice Alignment
Clear & Compelling Vision of Future	Organizational Knowledge
Training/Education	Organizational Knowledge
Training & Regulatory Compliance	Organizational Knowledge
Shared Technology Platforms & Appointment Setting Process	Organizational Knowledge
Sales should report to marketing	*(Structure)*

Delphi Round Two Results: Best Practices for Integrating Marketing and Sales

In round two, a PowerPoint presentation was emailed to the five experts who participated in round one interviews. All five exerts participated in round two. The PowerPoint presentation included a summary of results and bar charts of individual expert responses to round one questions, as well as a new questionnaire (Appendix H). The questionnaire was based on a five point Likert scale, ranging from not at all important (1) to extremely important (5). Participants were provided the opportunity to review responses to round one, asked to answer round two questions, and return the questionnaire via email to the researcher.

The round two questionnaire included the nine items on the original best practice questionnaire, as well as five additional best practices suggested by experts in round one. The three best practices on which experts reached consensus in round one (rating each extremely important (5) including: communication (Figure 22); clearly defined roles, responsibilities, and expectations (Figure 23); and performance metrics (Figure 24) were summarized in bar charts indicating participant agreement, but were not included as questions for additional rating in round two. Items were re-grouped by level of agreement in round one, followed by additional suggestions from experts. Responses were visible to all respondents, so they were aware of how their response aligned with those of other experts. Participants were identified by initials of their first and last names, to ensure anonymity.

The best practices in round one, which four of five agreed on a rating of extremely important (5) included: a customer focus (Figure 25), strategic planning (Figure 26), and organizational knowledge (Figure 27), in round two resulted in group consensus on a customer focus and strategic planning as extremely important (5) best practices for integrating marketing and sales. Differences about the importance of organizational knowledge increased in round two. One expert who rated organizational knowledge as a '5' in round one, dropped the rating to a '4' in round two; resulting in three '5's and two '4's. This demoted rating was especially interesting since it did not appear the expert was changing the rating to conform with the group, since this participant was one of the four of five experts who rated organizational knowledge as extremely important (5), in round one. However, it may be suggested that this participant, while still considering organizational knowledge as an important (4) best practice for integrating marketing and sales, dropped the rating assuming others would do so to align with the lower rating in round one.

Aligned rewards (Figure 28), lead management (Figure 29), intelligence gathering and distribution (Figure 30), all of which experts did not agree on in round one, resulted in slight ratings changes in round two. Shared/aligned rewards was rated as extremely important (5) by three experts, important (4) by one, and neutral (3) by one in round one. Although they were not willing to rate this item as extremely important (5), it appears as though two attempted to conform to each other in round two. The expert who originally rated shared/aligned awards as a ‘3’, raised the rating to a ‘4’; and the expert who rated it a ‘4’, dropped the rating to a ‘3’. Ultimately, the net result for round two on shared/aligned rewards between marketing and sales, remained the same as round one; three experts rating a ‘5’, one ‘4’, and one ‘2’ (Figure 28).

Lead management received three ‘5’s, one ‘4’, and one ‘2’ in round one (Figure 29). Four of the five experts changed their rating in round two: two of the ‘5’s dropped to ‘4’s, the ‘4’ raised to a ‘5’, and the ‘2’ raised to a ‘3’. It appears as though two of the three experts who rated lead management as extremely important (5) in round one, attempted to conform, and were willing to drop the level of importance to a ‘4’ in round two. Conversely, the expert who originally rated lead management as a ‘4’, raised the rating to a ‘5’, in what appears to be an attempt to conform and reach consensus. Although the participant who rated lead management as not important (2) in round one, appeared to be slightly influenced by the group resulting in an increased rating for round two, this expert was only willing to raise the rating by one point, to a ‘3’. Therefore, differences increased among experts on the importance of lead management in round; two rated it as extremely important (5), two rated it important (4), and one rated it neutrally (3).

Intelligence, which had the least amount of agreement in round one, drew a bit closer to agreement in round two (Figure 30); three of five experts increased their rating. One expert increased the rating from ‘4’ to ‘5’, one increased the rating from ‘3’ to ‘4’, and one from ‘2’ to ‘3’. It appears as though two of the three experts were attempting to conform. And, although one expert was again willing to raise the rating, it did not appear to be an attempt to conform to reach consensus. The net result for lead management in round two included: two experts rating it as extremely important (5), two important (4), and one neutral (3).

Five new items, suggested by experts as best practices for integrating marketing and sales in round one, were added to the email questionnaire for round two. These items included: training and education; sales reporting to marketing; regulatory compliance; shared technology platforms and appointment setting processes (Appendix H). Shared technology platforms received the most agreement (for best practices suggested by experts) among participants (Figure 31). Three experts rated shared technology platforms as being extremely important (5), and two rated it as important (4).

Three of the best practices suggested by experts received similar levels of agreement: training and education (Figure 32), sales reporting to marketing (Figure 33), and shared appointment setting processes (Figure 34). Two experts rated training and education as being extremely important (5) for integrating marketing and sales; two rated it as important (4), and one neutral (3).

Similarly, two experts indicated sales reporting to marketing is extremely important (5) for integrating the two functions (Figure 33). On the other end of the spectrum, two experts indicated it was not at all important (1) for sales to report to marketing. One expert rated it as neutral (3). Interestingly, the expert who suggested this as a best practice, who primarily focuses on marketing, rated it neutrally (3). Also worth noting, the two sales executives rated it as extremely important (5), while the other executive who primarily focuses on marketing, rated it as not at all important (1).

The expert who suggested shared appointment setting processes rated it as important (4); two experts rated it neutrally (3); and one rated it as not important (2) for integrating marketing and sales (Figure 34). Regulatory compliance was rated as extremely important (5) by the expert who suggested it as a best practice for integrating marketing and sales; two experts rated it neutrally (3); and one indicated it was not at all important (1) (Figure 35).

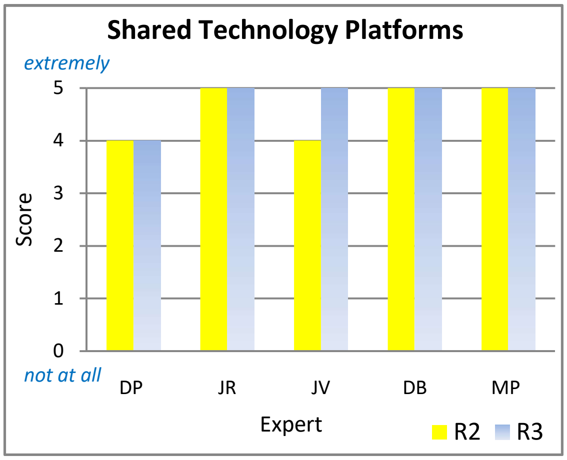


Figure 31. Shared technology platforms are important for integration.

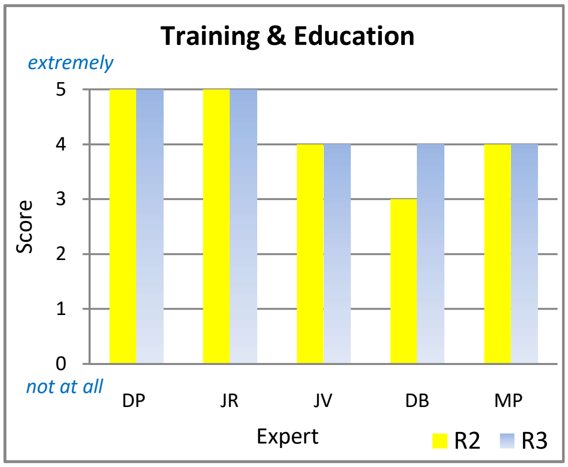


Figure 32. Training and education are important for integration.

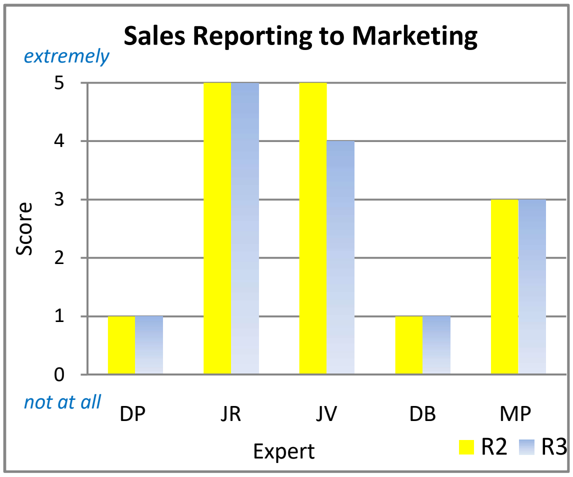


Figure 33. Sales reporting to marketing is important for integration.

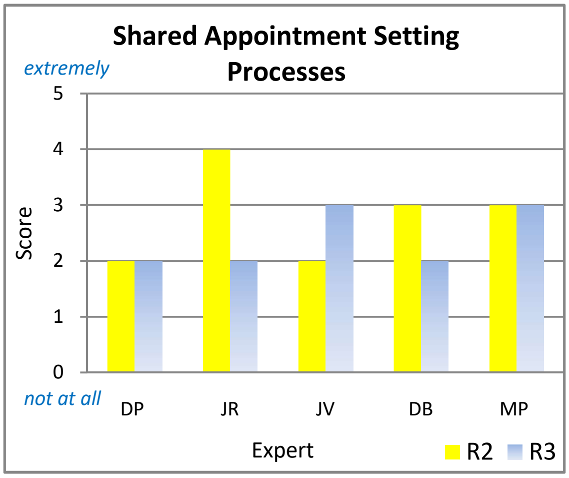


Figure 34. Shared appointment setting processes are important for integration.

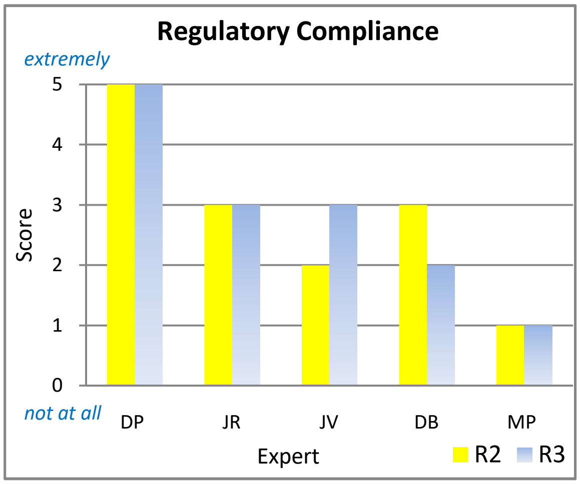


Figure 35: Regulatory compliance is important for integration.

Delphi Round Three Results: Best Practices for Integrating Marketing and Sales

In round three, a PowerPoint presentation was emailed to the five participants. All experts completed round three questionnaires. The PowerPoint presentation included a summary of results and bar charts of individual expert responses to round one and two, as well as a new questionnaire (Appendix J). The questionnaire was based on a five point Likert scale, ranging from not at all important (1) to extremely important (5). Participants were provided the opportunity to review responses to round one and two, asked to respond to round three questions, and return the questionnaire via email to the researcher.

Items that reached consensus in rounds one and two were dropped from round three. As indicated above, communication (Figure 22); clearly defined roles, responsibilities, and expectations (Figure 23); and performance metrics (Figure 24), were rated by all experts as extremely important (5) for integrating marketing and sales in round one. In round two, a customer focus (Figure 25) and strategic planning (Figure 26) reached consensus; all participants indicating both items are extremely important (5) for integrating marketing and sales in organizations.

The round three questionnaire included the four remaining items on the original best practice questionnaire, as well as the five additional best practices suggested by experts in round one; for a total of nine items to rate in round three (Appendix J). Items were re-grouped by level of agreement in previous rounds. Responses were visible to all respondents, so they were aware of how their responses aligned with others in previous rounds. Participants were identified by initials of their first and last names to ensure anonymity.

Organizational knowledge, which experienced slight movement from round one to round two, ultimately stabilized in round three, with four experts considering it to be extremely important (5) for integrating marketing and sales and one expert important (4) (Figure 27). Three experts consistently rated this item as extremely important (5) in all three rounds. One expert changed the rating from '5' in round one to '4' in round two, and returned the rating to '5' in round three. Additionally, the expert who originally rated organizational knowledge as neutral (3) in round one, rated it as important (4) in rounds two and three.

Shared/aligned rewards stabilized in round three, with four experts considering it to be extremely important (5) for integrating marketing and sales, and one important (4) (Figure 28). Three experts consistently rated this item as extremely important (5) in all three rounds. One expert dropped the initial rating of '4' in round one, to '3' in round two, and returned the rating to '4' in round three. The other expert gradually increased the rating in each round, from neutral (3) in round one, to important (4) in round two, to extremely important (5) in round three.

Intelligence and lead management were the most volatile (of the originally proposed best practices for integrating marketing and sales); achieving the least agreement in every round. Although ultimately four of five experts indicated intelligence gathering and distribution is important for integrating marketing and sales in organizations, the level of importance did not reach consensus (Figure 30). Two experts rated it as extremely important (5), two important (4), and one neutral (3). Three experts rated intelligence as extremely important (5), since one expert who rated it as a '5' in both rounds one and two, did not drop the rating to a '4' until round three, it appeared to be an attempt to conform. Interestingly, all experts changed their ratings (at some point) on this item; the only item (of the originally proposed best practices) with which this occurred.

Similarly, four of five experts initially indicated lead management is important for integrating marketing and sales in organizations, even though the level of importance did not reach consensus (Figure 29). In round three, two experts indicated lead management is extremely important (5), one important (4), and two neutral (3). Interestingly, while two experts increased their ratings from round one to round two, their ratings stabilized and remained consistent from round two to three. Additionally, two experts dropped their initial ratings of extremely important (5) in round one, in successive rounds. One of those experts dropped from a '5' to a '4', which stabilized and remained consistent as a '4' in round three. Potentially more interesting, one of the experts who rated a '5' in round one, dropped it to a '4' in round two, and dropped it (again) to a '3' in round three; which does not appear to be an attempt to conform, but instead align. Only one expert maintained consistent ratings throughout all three rounds on this item, rating lead management as extremely important (5) for integrating marketing and sales in organizations.

The best practices suggested by experts in round one, remained relatively stable throughout both rounds of rating (two and three). Shared technology platforms (Figure 31) was considered by all experts to be important for integrating marketing and sales in organizations. Ultimately, four of five experts rated it as extremely important (5) and one as important (4). Only one expert changed the rating from round one to round two; increasing the initial rating from ‘4’ to ‘5’.

Training and education were considered important and maintained the same amount of stability (as shared technology platforms) from round to round (Figure 32). One expert changed the rating on this item from neutral (3) in round two, to important (4) in round three, which appears to be an attempt to conform. Two experts rated training and education as extremely important (5) for integrating marketing and sales in organizations, and three rated it as important (4).

Like shared technology platforms, as well as training and education, one expert changed the rating from round two to round three, for sales reporting to marketing (Figure 33). Although still considering sales reporting to marketing as important, this expert dropped their rating from extremely important (5) in round one, to important (4) in round two. Although willing to lessen the level of importance, it does not appear to be an attempt to conform since in the first round of rating, both extremes were equally represented with two experts rating the item as extremely important (5) and two rating it as not at all important (1); and one (the expert who actually proposed marketing reporting to sales as a best practice) rating it as neutral.

Shared appointment setting processes and regulatory compliance experienced the most movement (among practices suggested by experts) from round to round. Shared appointment setting processes (Figure 34) was rated as neutral (3) by two experts in round two, as well as in round three. However there was a slight shift as one expert raised the rating from a ‘2’ to a ‘3’ and one lowered the rating from a ‘3’ to a ‘2’. Both appear to be attempting to conform. One expert remained consistent, rating it as not important (2) in both rounds. And interestingly, the expert who suggested the practice, originally rated it as important (4) in round two, dropped the rating to not important (2); obviously attempting to conform. But this action begs the question of the rating of ‘2’ rather than neutral (3), since two experts rated it as ‘2’, and two rated it as ‘3’ in round two.

Lastly, regulatory compliance was rated extremely important (5) by one expert (who suggested the practice), and not important at all (1) by one, in both rounds (Figure 35). Three experts rated it as neutral (3) at some point. The opinions of three experts remained constant through both rounds of rating. However, two experts changed their ratings; one raised the rating from not important (2) to neutral (3), and one decreased the rating from a ‘3’ to a ‘2’ – both appearing to be an attempt to conform.

Summary of Best Practices for Integrating Marketing and Sales in Organizations

Through a thorough review of literature, combined with the opinions of five expert marketing and sales executives (with a minimum of 30 years’ experience, in 40 different organizations, and seven industries), this study has identified best practices for integrating marketing and sales in organizations. Ultimately, all nine practices identified through the literature search, and originally proposed, were validated as ‘best practices’ for integrating marketing and sales. Additionally, two of five practices suggested by experts were validated as best practices.

As indicated in bold on the bottom box of the pyramid (Figure 36), communication; clearly defined roles, responsibilities and expectations; performance metrics; a customer focus; and strategic planning all reached consensus; rated as extremely important (5) for integrating marketing and sales in organizations. Shared/aligned rewards, organizational knowledge, and shared technology platforms, were also identified as best practices for integrating marketing and sales in organizations. Although participants did not reach consensus on these items, four of five experts rated these items as extremely important (5) and one rated them as important (4). Training and education, rated by two experts as extremely important (5) and three as important (4), has also been identified as best practice for integrating marketing and sales in organizations (Figure 36).

Although rated as less important, organizational intelligence and lead management should also be considered best practices for integrating marketing and sales. Four of five experts rated intelligence (gathering and distribution) as either extremely important (5) or important (4), with one rating it as neutral. Similarly, lead management was rated by four of five experts (in some round) as extremely important (5). Although in the final round, two experts rated it as neutral, no expert rated lead management as not important, in either round (Figure 36).

Sales reporting to marketing, shared appointment setting processes, and regulatory compliance were not identified as best practices for integrating marketing and sales in organizations. Although each of these received one or two 'important' ratings (5 and/or 4), in addition to neutral ratings, they also received ratings of not important (2) and not at all important (1).

Figure 36. Best practices for integrating marketing and sales in organizations with level of agreement indicated in boxes: the most important (and highest level of agreement) indicated by bold in bottom box.

CHAPTER 5: DISCUSSION

Overview of Study

Using the Delphi technique; combining a thorough review of literature, with opinions of experts during three rounds of data collection, this study determined best practices for integrating marketing and sales in organizations. A purposeful, heterogeneous sample of five experts, each of whom have a minimum of 30 years of experience as marketing and sales executives, in seven different industries, with 40 different organizations around the world, participated. Sales and marketing integration can be defined as the extent to which the activities carried out by the two functions are supportive of each other and lead to the realization of each other's goals and objectives in a coordinated, synchronized, or thoughtfully sequenced manner (Lyus et al., 2011).

Findings

In the literature, barriers to, as well as practices for, integrating marketing and sales were identified, which were presented to expert participants for rating using the Delphi technique in round one. Responses in reference to perceived barriers to marketing and sales integration (in round one), were consistent with the findings in the literature, as indicated in Chapter Two, expressing a wide range of disagreement on the barriers that create or cause conflict between marketing and sales; as well as the impact such barriers have on integrating marketing and sales. Consequently, rounds two and three focused on determining best practices for integrating marketing and sales in organizations; resulting in the 11 best practices being rated as important by experts including: communication, a customer focus, strategic planning, clearly defined roles and responsibilities, performance metrics, aligned rewards, organizational knowledge, training and education, organizational intelligence, and lead management.

Barriers to Integrating Marketing and Sales

Experts were asked how often nine different variables were considered barriers to marketing and sales integration. Responses were consistent with findings indicated in the literature, expressing a wide range of disagreement on the barriers that create or cause conflict, as well as the impact such barriers have on integrating marketing and sales.

Experts indicated the most agreement on three barriers: poor communication (Figure 11); lack of clearly defined roles, responsibilities, and expectations (role ambiguity) (Figure 14); and lack of performance metrics (Figure 17). Experts indicated a wide range of differences on six barriers: lack of a customer focus (Figure 12); lack of awareness and understanding of organizational knowledge (Figure 13); lack of strategic planning (Figures 15) and the strategic planning process (Figure 16); rewards that are not shared and/or aligned (Figure 18); lack of market, customer and competitive intelligence (Figure 19); intelligence gathering and distribution processes (Figure 20); and lead management (Figure 21). Additional barriers suggested by experts included: common language/terminology, culture, leadership styles, lack of trust and confidence in other's work, lack of effort, capacity planning and project management.

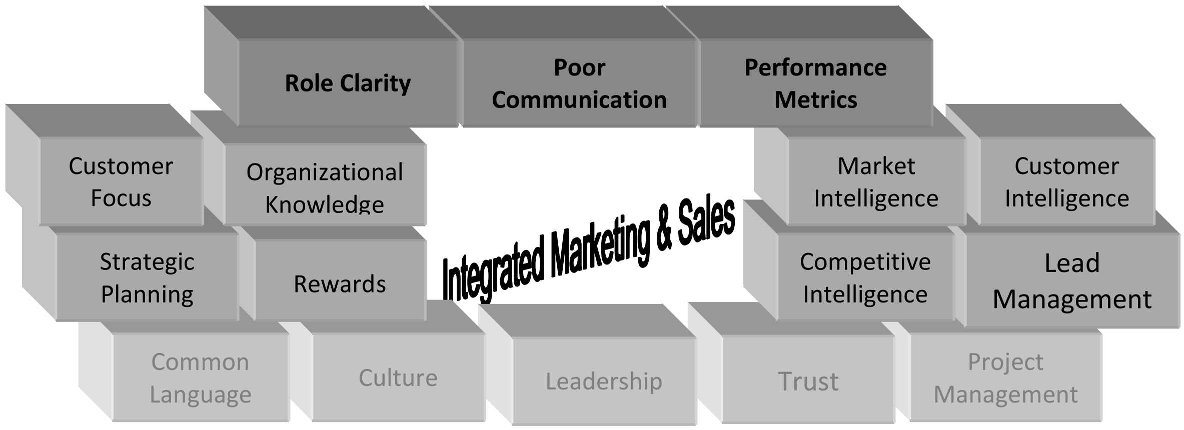


Figure 37. Barriers to integrating marketing and sales in organizations. Barriers most agreed to by experts are indicated by bold type in blocks at the top of the wall. The next layer of blocks (colored lighter gray) indicate barriers which received less agreement; lighter blocks with gray type at the bottom of the wall indicate barriers suggested by experts, which received the least agreement.

Best Practices for Integrating Marketing and Sales in Organizations

There was high level agreement that communication, a customer focus, clearly defined roles and responsibilities, strategic planning, and performance metrics are extremely important best practices for integrating marketing and sales in organizations. Other items identified as best practices included: organizational knowledge, training and education, shared/aligned rewards, common technology platforms, organizational intelligence (i.e., market, competitor, and customer information), and lead management. Although reporting structure (sales reporting to marketing), shared appointment setting processes, and regulatory compliance were considered, they were not consistently identified as best practices for integrating marketing and sales in organizations.

Interpretations of Data

Before exploring best practices identified for integrating marketing and sales, it is worth noting some interesting parallels between literature and expert opinions related to integrating marketing and sales in organizations. As illustrated in Table 10, academic articles have focused on topics including: communication, role clarity, performance metrics, strategic planning, rewards, organizational knowledge, intelligence, and lead management. As indicated, the topics which have been researched most, were also identified by experts as the most important practices for integrating marketing and sales in organizations. One exception is performance metrics; the value of which does not appear to have been explored by academic researchers, although proven to be key drivers for employee and organizational performance.

Typically the related functions are referred to as “sales and marketing” in the United States. However, LeMeunier FitzHugh and Piercy, United Kingdom-based scholars, have published the most (eight) articles in academic journals, from 2006 to 2011 (Table 1) reference sales as being a subset of marketing. Interestingly, Peters, a participant in this study, suggested sales should report to marketing. Peters, an American citizen now, is a British national who began his career in the United Kingdom.

Best Practices for Integrating Marketing and Sales in Organizations

Communication; clearly defined roles, responsibilities and expectations; performance metrics; a customer focus; and strategic planning all reached consensus. Rated as extremely important (5), these best practices were identified as the most important for integrating marketing and sales in organizations.

Table 10.
Summary of Practices for Integrating Marketing and Sales and Authors

Integration Practice(s)	Author(s)
Communication (26)	Madhani (2015); Malshe (2011, 2010); Biemans (2010); Le Meunier-FitzHugh & Piercy (2010, 2009, 2007); Biemans & Brenčič (2007); Massey & Dawes (2007); Beverland, Steel, & Dapiran (2006); Borders (2006); Guenzi & Troilo (2006); Kotler, Rackham, & Krishnaswamy (2006); Matthyssens & Johnston (2006); Oliva (2006); Barki & Pinsonneault (2005); Dawes & Massey (2005); Rouziès, Anderson, Kohli, Michaels, Weitz, & Zoltners (2005); Ingram (2004); Dewsnap & Jobber (2002); Kahn (2001, 1996); Kahn & Mentzer (1998); Fisher, Maltz, & Jaworski (1997); Ruekert & Walker (1987); Gupta, Raj, & Wilemon (1985)
Role Clarity (14)	Malshe (2011, 2010); Troilo, De Luca, & Guenzi (2009); Beverland, Steel, & Dapiran (2006); Dawes and Massey (2006); Matthyssens & Johnston (2006); Oliva (2006); Ingram (2004); Dewsnap & Jobber (2002); Menon, Bharadwaj, & Howell (1996); Ruekert & Walker (1987); Gupta, Raj, & Wilemon (1987, 1986, 1985)
Performance Metrics (2)	Borders (2006); Kotler, Rackham, & Krishnaswamy (2006)
Customer Focus (19)	Madhani (2015); Le Meunier-FitzHugh & Piercy (2011, 2009,2007); Malshe (2011); Le Meunier-FitzHugh & Lane (2009); Troilo, De Luca, & Guenzi (2009); Kumar, Venkatesan, & Reinartz (2008); Homburg & Jensen (2007); Beverland, Steel, & Dapiran (2006); Borders (2006); Guenzi & Troilo (2006); Matthyssens & Johnston (2006); Peppers (2008); Dawes & Massey (2005); Rouziès, Anderson, Kohli, Michaels, Weitz, & Zoltners (2005); Homburg & Pflesser (2000); Strahle, Spiro, & Acito (1996); Cespedes (1993)

Integration Practice(s)	Author(s)
Strategic Planning (22) - process - shared goals & objectives	Atteya (2012); Malshe (2011, 2010); Biemans, Brenčič, & Malshe (2010); Le Meunier-FitzHugh & Lane (2009); Malshe & Sohi (2009); Homburg & Jensen (2007); Le Meunier-FitzHugh & Piercy (2007); Guenzi & Troilo (2007, 2006); Beverland, Steel, & Dapiran (2006); Kotler, Rackham, & Krishnaswamy (2006); Piercy (2006); Rouziès, Anderson, Kohli, Michaels, Weitz, & Zoltners (2005); Dewsnap & Jobber (2002); Shapiro (2002); Maltz & Kohli (2000); Song, Xie, & Dyer (2000); Cespedes & Piercy (1996); Kahn (1996); Cespedes (1993); Tjosvold (1988)
Rewards (7)	Atteya (2012); Le Meunier-FitzHugh, Massey, & Piercy (2011); Biemans & Brenčič (2007); Matthyssens & Johnston (2006); Rouziès, Anderson, Kohli, Michaels, Weitz, & Zoltners (2005); Dewsnap & Jobber (2002); Strahle, Spiro, & Acito (1996)
Organizational Knowledge (14) - vision, mission - overview (products, services, etc) - training & education	Atteya (2012); Le Meunier-FitzHugh & Piercy (2010, 2009, 2007); Beverland, Steel, & Dapiran (2006); Matthyssens & Johnston (2006); Guenzi & Troilo (2006); Barki & Pinsonneault (2005); Dawes & Massey (2005); Dewsnap & Jobber (2002); Maltz & Kohli (2000); Kahn (1996); Jaworski & Kohli (1993,1990)
Intelligence (22) - market - competitor - customer - systems & processes	Madhani (2016); Arnett (2014); Hughes, Bon, & Malshe (2012); Le Meunier-FitzHugh & Piercy (2011, 2010, 2009, 2007, 2006); Lyus, Rogers, & Simms (2011); Le Meunier-FitzHugh & Lane (2009); Troilo, De Luca, & Guenzi (2009); Piercy & Lane (2008); Beverland, Steel, & Dapiran (2006); Borders (2006); Guenzi & Troilo (2006); Matthyssens & Johnston (2006); Oliva (2006); Peppers (2008); Homburg & Pflesser (2000); Maltz & Kohli (2000); Jaworski & Kohli (1993, 1990)
Lead Management/ Demand Generation (3)	Malshe (2011); Oliva (2006); Peppers (2008);

Communication. Communication appears as the central node in the network of concepts representing integration (Dewsnap & Jobber, 2000; Rouziès, Anderson, Kohli, Michaels, Weitz, & Zoltners, 2005). Guenzi and Troilo's findings (2006) reinforce that effective communication between marketing and sales yields many positive outcomes including stimulating confrontation, mutual understanding, collaboration, and sharing. These, in turn, foster increased effectiveness and efficiency of market knowledge development and decision making, while supporting an organizational climate based on trust and cooperation. Integration can be achieved at different organizational levels: from bottom-line activities to strategic decision-making and long-term investments decisions; sharing of goals, resources and strategies and plans (Guenzi & Troilo, 2006).

A plethora of studies have been published on the need and value of communication. In business, communication has evolved from being one-way, typically downward; to vertical two-way (upward and downward) in the 1980s; followed by horizontal two-way (cross functional), in the mid to late 1980s; followed by the preferred and recommended multi-directional communication in the 1990s. Multi-directional communication allows people to communicate up and down, and peer to peer, within their reporting structure; as well as peer to peer, and up and down, cross functionally; regardless of their hierarchical level. Multi-directional communication allows for the most efficient and effective communication flow, ideally minimizing internal politics and power struggles within organizations; successfully optimizing business performance.

***Communication frequency and quality*.** When adopting open communication environments, it is critical to consider frequency and quality of communication. In some cases, in an effort to improve communication, frequency is simply increased. This may lead to information overload, which can be counterproductive. Excessive communication, can lead to information overload, hampered decision making, and/or decreased quality of information exchanged (Troilo et al., 2009).

Make sure communication is timely and of high quality at all times (Matthyssens & Johnston, 2006). Communication quality, involving close and informal communication, is positively associated with cross-functional integration (Massey & Dawes, 2007). Communication quality is defined as how credible, understandable, relevant, and useful the information provided (Massey & Dawes, 2007). Massey and Dawes (2007) found communication frequency is positively associated with communication quality and communication quality had the single strongest positive effect on functional conflict and perceived relationship effectiveness.

It is paramount communication be planned and of high quality; keeping in mind the target audience (intended recipient(s)), message, and priority of the communiqué, which then should determine the method(s) or tool(s) used to deliver the message. Ingram (2004) suggests organizations may enhance collaboration between marketing and sales by implementing specific programs to increase communication and cooperation (Biemans et al., 2010).

Organizations can develop a communication tools dashboard/matrix to help ensure effective communication strategies (Appendix M). Companies should develop systematic processes and guidelines (Kotler et al., 2006). Sales people and marketers need to know when and with whom they should communicate (Kotler et al., 2006). Implementing the best practices identified for integrating marketing and sales, to ensure successful performance, requires the two functions to communicate on a regular basis. Marketing and sales should have regular meetings (with each other) to discuss progress toward goals, market changes, potential challenges and issues, as well as adjustments needed. The frequency of meetings is dependent on the pace of the organization; occurring no less than once each quarter. “For better integration of sales and marketing, hold regular team meetings to coordinate all team members**”** (Matthyssens, 2006, p. 344, Table 1).

It may be necessary to hold people accountable for communication effectiveness (and responsiveness) in some organizations where communication may not be considered a valuable attribute of the organizational culture. If necessary, this can be reinforced as a performance metric for individuals.

Clearly defined roles. “For better integration of sales and marketing, make sure everyone in sales and marketing has an appreciation of each other’s roles and contribution” (Matthyssens,2006, p. 344, Table 1). Marketing must make genuine efforts to understand the work and the challenges involved in sales, involve sales in important strategic activities, and engage them in intelligent and respectful conversations (Malshe, 2010). Marketing must serve as a readily accessible information source for sales (Malshe, 2010). To be perceived as credible, sales people must clearly understand the value marketing creates for them and feel the impact of marketing's initiatives in their daily activities (Malshe, 2010).

Marketers must possess and show their business expertise through their words and actions to establish credibility in sales people's eyes (Malshe, 2010). To enhance their credibility, marketers must possess superior business know-how as well as ensure they come across as authoritative knowledge sources (Malshe, 2010). Marketers are able to show their expertise, thereby establishing credibility through creating or adding value to sales ' activities; and serving as a readily available source of product and customer knowledge for sales people (Malshe, 2010).

Marketers are not always conscious of the role they can play in the motivation of sales people (Matthyssens & Johnston, 2006). After roles and responsibilities are clearly defined, and expectations established, it is important this information is communicated to the teams.

Performance metrics. Organizations need to be metrics driven and have metrics in place that track both sales and marketing performance (Kotler et al., 2006). Marketing and sales should have shared goals, objectives and performance metrics, all with the primary focus to acquire satisfied, happy, loyal customers, which generate revenue. When sales and marketing work well together, companies see substantial improvement on important performance metrics: sales cycles are shorter, market-entry costs go down, and the cost of sales is lower (Kotler et al., 2006). Evaluate and reward both teams' performance based on shared important metrics (Kotler et al., 2006).

Metrics for measuring cooperation between marketing and sales [can] include formal systems such as: targets regularly set and updated; good, reliable communication; known delegation of responsibilities; and availability for access to all involved to be able to provide better customer solutions (Borders, 2006). In addition, there should be a focus on creating value for customers, which must be accompanied by evaluation and compensation systems that encourage the desired behavior; with compensation based on customer satisfaction rather than on realizing a predetermined sales objective (Biemans & Brenčič, 2007). Kotler et al. (2006) stresses the need to set shared revenue targets and reward systems. The integrated organization will not succeed unless sales and marketing share responsibility for revenue objectives. Integrated teams share systems, performance metrics, and rewards. They behave as if they will rise or fall together (Kotler et al., 2006).

Customer focus. One of the strongest drivers for an organization to align its marketing and sales functions is its global customers (Borders, 2006) (Figure 38). "For better integration of sales and marketing, make sure the organizational structure is customer centric" (Matthyssens, 2006, p. 344, Table 1). Short and long term business value comes from the only business that matters: customers (Peppers, 2008). As the sales and marketing interface has a direct and significant impact on customers, it is possibly of greater importance to improving business performance than many other internal interfaces (Dawes & Massey, 2005; Homburg & Jensen, 2007; Le Meunier-FitzHugh & Piercy, 2007a; Rouziès et al., 2005). A customer focus is a critical success factor for organizational success. However, it is not enough to simply state it; actions must indicate customers are the number one priority.

A customer-oriented culture implies a set of shared beliefs regarding the centrality of the customer (Homburg & Pflesser, 2000). It helps provide a common vision and mission, helping to foster allegiance and team work. This does not mean the customer is always right, but rather the organization needs to operate to meet customer needs. A customer focus (also referred to as orientation) is the set of beliefs that puts the customers' interests first, while not excluding those of all other stakeholders such as owners and employees, in order to develop a long-term profitable enterprise (Kumar et al., 2008). With this in mind, savvy organizations recognize maximizing success in business means determining customer needs often before the customer realizes what their needs are, much less that they even have needs. Determining customer needs, providing solutions to those needs, and customer relationship management are key drivers for success, if done better than the competition.

Peppers (2008) outlines a customer-focused process which entails planning, demand generation, opportunity management, offer delivery, order completion, purchase, and loyalty. Throughout this process, marketing and sales teams work together to develop an end-to-end process and a common definition of the ideal customer. Sales closely communicates and collaborates with marketing, both requesting supporting materials and providing feedback. Both sales and marketing measure and track customer satisfaction and product usage, using that feedback to identify future opportunities with the customer, refine ongoing communication processes, identify purchase tendencies, and other key trends (Peppers, 2008). A customer-oriented culture allows an organization to achieve customer satisfaction, increase customer loyalty, and attract new customers (Slater et al., 1995).

Focused on customers, a common vision provides a foundation for marketing and sales integration, around which all of their activities and performance metrics should revolve. According to Biemans, Makovec, and Brenčič (2010), integration appears to be the ideal configuration, with marketing and sales functions harmoniously collaborating to offer superior value to customers. Because these organizations have mechanisms in place that allow them to learn and store knowledge, they are able to deal proactively with long-term changes in the industry, and maintain consistency in value creation and delivery. Further, they are equipped to identify and address emerging needs in the marketplace. An integrated marketing and sales configuration allows organizations to address changing market realities and change course as needed.

Maintaining one face to the customer, and the sense of one company projected by integrating marketing, sales and service data, is what customers are seeking (Borders, 2006). Leaders must strive to create a shared vision that puts customer needs above everything else and makes sales and marketing personnel believe customer pains are more important than inter-functional troubles (Malshe, 2011).

Without customers, organizations cannot generate revenue. In the ideal state, marketing becomes a sales multiplier and sales becomes the confidant to marketing. Together they focus on what customers need and when they need it (Peppers, 2008). Marketing should be identifying and communicating with the most valuable customers and sales should be selling to them (Peppers, 2008). The more globally developed multinational customers become, the more they expect globally integrated sales and marketing strategies (Borders, 2006). “All customer facing organizations should be measured and paid on ‘customer delight’ – including both internal and external customers,” J. Reinig (personal interview September 28, 2016).

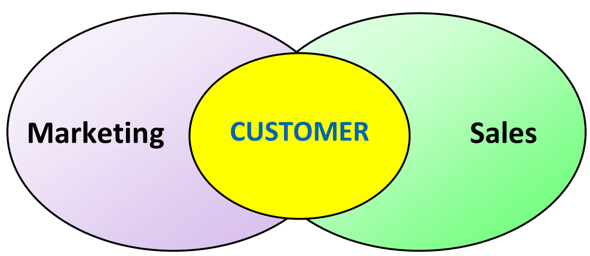


Figure 38. A customer focus shared by marketing and sales.

Strategic planning. Strategic planning is a critical business process, which should occur on a regular basis. Organizations that have developed a distinctive capability for managing collaborative relationships find they have more integrated strategies (Rouziès et al., 2005).

Strategic planning should start at the top of the organization; with the development of a business plan. Marketing plans should be developed in accordance with the business plan. Ideally plans are developed annually; unless a major market or business shift occurs requiring a mid-stream course correction. Standard strategic (business) plans include the following basic components: goals, objectives, tactics, effectiveness evaluation, timeline, and budget. Ideally, plans contain both short and long term goals.

Long term goals should focus on accomplishments in the next three to five years; with more attention being given to annual and shorter term goals. For instance, establish a sales goal to which both teams commit, and define key sales metrics—such as number of new customers and closings—for sales people *and* marketers (Kotler et al., 2006). Goals need to be specific and measureable. Successful marketing calls for establishment of well-defined goals, agreed upon by both sales and marketing, and make a significant contribution to the organization's success (Atteya, 2012).

Objectives indicate how the goals will be achieved. Integration between sales and marketing is critical to the performance of both functions and the achievement of organizational objectives (Beverland et al., 2006). A commitment to macro-level objectives helps departments align their differences in orientations (short versus long-term, tactical versus strategic, or product versus customer orientation) and knowledge (product versus customer knowledge) in a productive way (Homburg & Jensen, 2007). An integrated organization will not succeed unless sales and marketing share responsibility for revenue objectives (Kotler et al., 2006). Tactics detail how objectives will be achieved. "For better integration of sales and marketing, coordinate visions, objectives and activities between both departments" (Matthyssens, 2006, p. 344, Table 1).

Effectiveness evaluation measures and performance metrics should be developed to solidify expectations and ensure goals and objectives are met; organizationally, functionally, and individually. A detailed timeline should be developed for the completion of all goals, objectives and tactics to ensure achievability and maximal performance. Lastly, an itemized budget should be developed to ensure required funding to accomplish the strategy. Rouzies et al. (2005) note for a function's activities to be supportive of the other function's activities, the two must be consistent and congruent with each other (e.g., lead to realization of each other's goals and objectives), and the timing of the activities must be coordinated (i.e., concurrent or thoughtfully sequenced).

As discussed earlier, sales often does not participate in the development of marketing plans. It is paramount sales and marketing cooperate in the development of strategic plans. Both sales and marketing personnel feel when sales people are part of the strategy creation process, they feel more committed to it and buy into it (Malshe & Sohi, 2009a). A study conducted by Biemans et al. (2010) found when marketing and sales have an equal stake in the creation and success of strategies and plans, they both want to contribute the best ideas and develop the best possible plans. When sales people are involved in strategy creation or strategy fine-tuning processes, sales embraces new marketing initiatives easily, reducing acrimony and strengthening their connections with marketing (Malshe, 2011). Marketing may drive market analysis; product development, planning and promotion; corporate identity, branding, messaging, etc.; but sales, is ultimately responsible for customer acquisition and sales.

Marketing should enable sales, not as a resource; but as a partner. Therefore, marketing and sales (as well as other organizational functions) need to work together to develop synchronized, achievable strategies/plans. The key to ensuring strategy success, and ensuring cooperative integration, is developing shared and aligned goals, as well as holding individuals accountable for accomplishment of (pre-determined) goals and objectives, through functional and individual performance metrics.

Shared/aligned rewards, organizational knowledge, and shared technology platforms, were identified as best practices for integrating marketing and sales in organizations. Although experts did not reach consensus on these, four of five experts rated these items as extremely important (5) and one expert rated them as important (4). Training and education was rated by two experts as extremely important (5), and three experts as important (4). Consequently, training and education, validated as a best practice for integrating marketing and sales in organizations, should be reincorporated as a component of organizational knowledge (as intended in best practices originally proposed, based on the review of literature).

Shared/aligned rewards. "For better integration of sales and marketing, use incentives to support cooperation and reward successful examples when they occur" (Matthyssens, 2006, p. 344, Table 1). Many scholars have suggested aligned rewards improve sales and marketing integration (Dewsnap & Jobber, 2000; Kotler et al., 2006; Le Meunier-FitzHugh et al., 2011; Rouzies et al., 2005). Integrated teams share systems, performance metrics, and rewards; they behave as if they will rise or fall together (Kotler et al., 2006). The purpose of the reward system is to align the goals of the employee with the goals of the organization; and to be successful, the focus of rewards must be compatible with the tasks and structures of the organization (Le

Meunier-FitzHugh et al., 2011). It is important sales people are evaluated and compensated not only for achieving sales volume goals, but also for their overall effectiveness in implementing product strategies (Strahle et al., 1996). Remuneration should be adapted so sales strategy is directed toward marketing strategy (Matthyssens & Johnston, 2006). Similarly, Strahle et al. (1996) strongly recommend sales bonus schemes be linked to implementing marketing strategy successfully.

Kotler et al. (2006) suggested sales and marketing rewards should be aligned so both functions share responsibility for revenue objectives. Financial and non-financial rewards can motivate the personnel in both marketing and sales (Atteya, 2012). According to Le Meunier-FitzHugh et al. (2011), joint or aligned rewards help increase collaboration, because both groups [marketing and sales] feel a responsibility for the success or failure of the joint project. If both groups are given rewards (in whatever form) to achieve the same goals, they are more likely to be motivated to cooperate and coordinate activities (Le Meunier-FitzHugh et al., 2011). A part of the rewards and salary increases of the marketing and sales staff should be tied to their level of collaboration (Atteya, 2012).

Organizational knowledge. A core foundation for organizational success, organizational knowledge is facilitated by effective communication and training; clearly defining and communicating consistent messaging, voice, expectations, and performance. Knowledge refers to a capacity to exercise judgment and act; it is a function of experience, contextual expertise, and interpretation (Davenport et al., 1998). Some scholars have described and classified 'org knowledge' as synonymous with intelligence gathering (i.e., market, competitor, and customer intelligence). However, business practitioners tend to separate market intelligence functions, which typically reside in the marketing department; from organizational intelligence, which is typically a corporate communication and/or public relations function, encompassing a much broader focus including: internal intelligence, corporate messaging and positioning; vision and mission, offerings, performance, etc. Knowledge is a critical asset that needs to be managed strategically (Wenger, 2000).

It is important for organizational messages to be developed and distributed to all employees on a regular basis, using a variety of delivery mechanisms including (for example): meetings, written messages, reports, and training. It is important communication is pushed out to employees not pulled (requiring employees to seek information). Core messaging should focus on such things as the business vision, mission, goals, objectives, product and service offerings, key differentiators, and performance metrics. Open, transparent communication is key and begins at the highest levels of the organization. Information sharing creates a collective understanding of the situation and helps to get both sales and marketing on the same page. Information sharing has been shown to play a critical role in organizational learning (Slater & Narver, 1995), knowledge management, and marketing orientation (Kohli & Jaworski, 1990).

Training and education. “For better integration of sales and marketing, conduct joint training” (Matthyssens, 2006, p. 344, Table 1). The creation of learning facilitates collaboration between two diverse and specialist groups to the organization’s benefit (Le Meunier-FitzHugh & Piercy, 2010). Learning should establish horizontal information exchanges that can create knowledge across the organization in order to improve customer satisfaction and competitiveness (Ingram, 2004).

Training should be should be continuous (at regular intervals), ideally conducted in person with multiple functional groups represented. It provides opportunities for team building, better understanding of roles and responsibilities of 'other' functions; ensures consistent messaging and experiences. Content should include such topics as: organizational information (i.e. product and service offerings, strategic plans, business goals, performance metrics, and market positioning), as well as relevant functional/departmental information.

Shared technology platforms. Organizations need to develop shared databases, as well as mechanisms for continuous improvement (Kotler, 2006). Technology platforms can be used for information sharing such as organizational knowledge, organizational intelligence, customer relationship management, and lead management. "For better integration of sales and marketing, use management information systems, including sales force automation and customer relationship management databases**"** (Matthyssens, 2006, p. 344, Table 1). Although historically such platforms required customized development of databases, there are several software applications available on the market; such as salesforce.com, a common platform currently being implemented in organizations around the world. However, shared technology platforms are often met with resistance as practitioners often view them as time consuming and intrusive; providing little value. Additionally, although intended to integrate activities and functions, while simultaneously providing detailed transparency, it is the transparency that often creates the biggest barrier. Typically, sales people are territorial and competitive by nature; they often believe knowledge is power and do not want to share information which they see as a competitive advantage. Based on the researchers experience, to ensure utilization of shared technology platforms (especially cross functionally), practitioners need to be held accountable for doing so through in individual performance metrics.

Organizational intelligence and lead management should also be considered best practices for integrating marketing and sales, although rated as less important. Four of five experts rated intelligence (gathering and distribution) as either extremely important (5) or important (4), with one expert rating it as neutral. Similarly, lead management was rated by four of the five experts (at some point) as extremely important (5).

Organizational intelligence. Gathering and disseminating market, competitive, and customer intelligence can be a key determinant of business performance and success. Success demands a market orientation that reflects an organization-wide generation of market intelligence, dissemination of this intelligence across disciplines, and responsiveness to it (Hughes et al., 2012; Jaworski & Kohli, 1993). Organizations that have highly integrated sales and marketing are able to gather better quality marketing intelligence and will be better at reacting to market dynamics by formulating and implementing effective strategic responses compared with those that do not (Lyus et al., 2011). Keeping the pulse of the market, what competitors are doing, as well as the needs of customers can be the difference between success and failure. An organization's competitive advantage is increasingly reliant on ability to use market intelligence effectively (Maltz & Kohli, 2000). This information impacts business decisions across the entire organization; although arguably most directly marketing and sales. Market intelligence allows both sales and marketing to focus their activities on customers more efficiently, and relies on information from both functions to be effective; providing an opportunity for the development of organizational learning through information sharing (Le Meunier-FitzHugh & Piercy, 2007a).

Organizational Intelligence Process. Effective market intelligence gathering plays an increasingly important role in informing strategic decision making within a market orientated organization (Piercy & Lane, 2008). Le Meunier-FitzHugh and Lane (2009) found an effective marketing intelligence process can have a considerable impact on improving the relationship between sales and marketing as well as driving a market orientation. While typically the responsibility of marketing, sales can (and should) participate in intelligence gathering.

Information collection needs to be planned and accuracy of information verified (Le Meunier-FitzHugh & Piercy, 2006). Marketing should provide information on market position, customer satisfaction and turnover, and return on investment (Matthyssens & Johnston, 2006). The marketing function works to anticipate and learn needs and trends, develops a picture of the competitive arena, segments and targets markets, and develops strategies to position an organization in these segments; which are key to strong marketing and sales performance (Oliva, 2006).

Sales people interact directly with customers, providing invaluable insights, as well as competitors and the market as a whole. The sales force has the ability to provide information about customer needs (assessing new market segments), as well as up-to-date intelligence on competitors' capabilities, products, and services (Le Meunier-FitzHugh & Piercy, 2006). The sales force is a key element in the collection of reliable market intelligence as they are at the customer interface, meet with competitors' representatives, and generally have their 'ear to the ground' about conditions in the market (Le Meunier-FitzHugh & Piercy, 2006).

Although it may be the most pragmatic for marketing to continue to own the process of analysis and distribution of intelligence, both marketing and sales should contribute to the collection of data; integrating efforts to provide an efficient and effective market intelligence system. Improving market intelligence is beneficial to both marketing and sales; therefore, they should be motivated to develop this area together (Le Meunier-FitzHugh & Piercy, 2007a). Effective integration between marketing and sales positively contributes to the generation and dissemination of marketing intelligence (Kohli & Jaworski, 1990).

Lead management. One of marketing's primary responsibilities is to generate demand for products and/or services. The most common way to track and manage the demand process is referred to as lead management – generating, qualifying, and following up on leads for prospective customers. This is historically one of the most contentious issues between marketing and sales. Marketing works diligently to generate leads, which sales fails to find value in and/or follow-up on. To address this issue, in addition to generating leads, marketing typically attempts to qualify leads; determine how likely and how soon the potential customer will make a purchase. Although software products have been developed in an attempt to facilitate and add value to this process (e.g., Salesforce.com), these applications often do not decrease the tension between the two functions. Software is only beneficial if used consistently and is often considered time consuming and burdensome.

A successful lead management system requires integration between marketing and sales – coordination is not enough as it is often undefined, lacking specific direction and assigned responsibility. Marketing and sales need to determine (together) what constitutes a good lead, qualification criteria, follow-up process, and feedback mechanisms – as part of a fully integrated system, which provides value and benefit to both functional teams and the organization as a whole. Both teams need to be held accountable, with expectations clearly defined and communicated; ideally in strategic plans, accompanied by corresponding performance metrics. When all levels within the sales and marketing hierarchy take ownership of the demand generation process, it facilitates the process of sales-marketing integration (Malshe, 2011).

Other expert suggested best practices. Sales reporting to marketing, shared appointment setting processes, and regulatory compliance, although considered, were not validated as best practices for integrating marketing and sales in organizations.

***Organizational structure*.** There have been several suggestions sales and marketing should be merged into a single department, integrating their activities under a single manager (Kotler et al., 2006; Matthyssens & Johnston, 2006; Oliva, 2006; Rouziès et al., 2005); including a suggestion by a participant in this study that sales should report to marketing. Matthyssens and Johnston (2006) plead for central coordination of activities by creating the function of a sales and marketing leader to whom both departments report. The visions, objectives, and activities of the departments could then be better coordinated. A joint department under a one leader may improve collaboration by allowing bridges to be created between the sales and marketing functions, communication to be improved, activities aligned, and conflict reduced (Le Meunier-FitzHugh & Piercy, 2008).

Although preferably, marketing and sales are fully integrated, reporting to the same senior-level leader, this is an alignment issue that is not always controllable due to internal politics, geographic restrictions and/or other organizational inhibitors. There is debate in academic literature, as discussed earlier, as to the impact reporting structure and co-location of marketing and sales actually have on marketing and sales working synergistically. Sales and marketing may perceive they are more integrated if placed in the same building/office. However, a study by Le Meunier-FitzHugh and Piercy (2008) found the actual location of sales and marketing had no impact on collaboration between sales and marketing.

Although structure and location can be a challenge, they can be overcome. In an ideal situation, marketing and sales will report to the same leader. In smaller organizations, which often do not have extensive geographic reach, it may be possible to have all team members based at the same location -- preferably at the corporate headquarters. However, in larger, more disparate organizations, there may be benefit to having team members geographically dispersed. In either case, ideally all team members report to the same leader. It is the belief of this researcher that an organizational structure, which integrates marketing and sales functions under the same senior leader, fosters cooperation and integration; minimizes cultural conflicts; increases efficiency, effectiveness, customer satisfaction, and ultimately business performance. However, it was not identified as a best practice in the original Delphi questionnaire due to the difficulty of achieving this type of structure in some organizations. Integration of marketing and sales can be achieved in spite of organizational structure, if best practices are implemented and functional individuals are held accountable for doing so.

Shared appointment setting processes. Although suggested by an expert participant, other experts who participated in this study did not agree shared appointment setting processes were an important best practice for integrating marketing and sales. There are many software applications on the market which provide the opportunity to share appointment setting processes as well as individual calendars. However, in addition to being time consuming, practitioners do not typically embrace transparency of their schedules.

***Regulatory compliance*.** Regulatory compliance was suggested (by an expert participant) as a best practice for integrating marketing and sales in organizations. However, it was not considered to be important by other participants in this study. This suggestion was made by an executive who has worked in healthcare and medical devices throughout their entire career. Although it appears no studies have been published on this topic in academic literature (to date), it is understandable this may be an important integration consideration/tool in heavily regulated industries such as healthcare, oil and gas, government, finance, and manufacturing.

Conclusions

In conclusion, there was consensus among all expert participants in this study (each of who have a minimum of 30 years of experience, in seven industries, and 40 different organizations around the world), that marketing and sales should be integrated. "Yes, absolutely!" (Vogel, personal interview, Sept. 29, 2016). "Marketing and sales needs to be integrated; under one leader," (Perez, personal interview, Sept. 30, 2016). According to Peter's, "Sales and marketing need to synch or sink. A genuine belief that we are in it together, and we are better off together, is paramount," (Peters, personal interview, Sept. 30, 2016). "Yes. Marketing is the eyeballs of the organization, providing go-to-market strategies; and sales is the hands of the organization," (Brouwer, personal interview, Oct. 7, 2016).

Experts agreed on the importance of 11 best practices for integrating marketing and sales in organizations. As indicated by bold in the top box, communication, clearly defined roles, performance metrics, customer focus, and strategic planning were rated as extremely important by all experts. Experts indicated a high-level of agreement that shared/aligned rewards, organizational knowledge, training and education, as well shared technology platforms are also important best practices, as indicated in the middle box. Although receiving less agreement, organizational intelligence and lead management were also rated as important best practices for integrating marketing and sales (Figure 39).

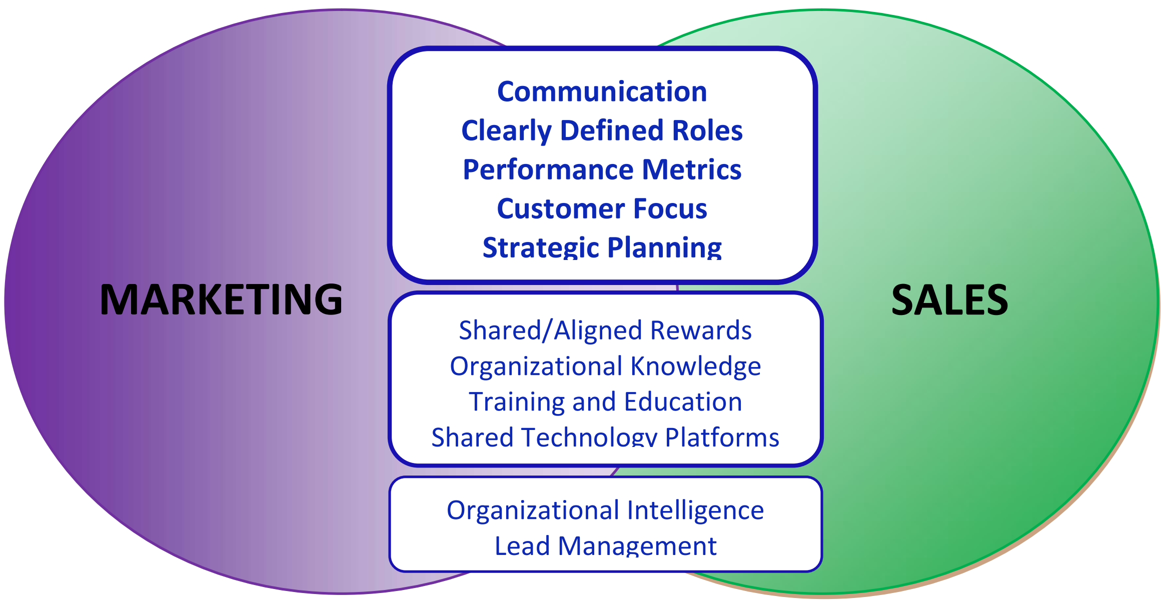


Figure 39. Best practices for integrating marketing and sales in organizations grouped by level of agreement and ranking (from top down) with the highest level of agreement indicated by bold in the box at the top.

Contribution of Study to Practice and Knowledge

Integrating marketing and sales can improve performance; increase efficiency, effectiveness, customer and employee satisfaction. Scholars have noted positive outcomes such as overall business performance (Dewsnap & Jobber, 2000; Kotler et al., 2006; Le Meunier-FitzHugh & Piercy, 2007a; Rouziès et al., 2005; Shapiro, 2002), enhanced departmental and product management performance (Kahn, 1996), enhanced learning capabilities (Guenzi &

Troilo, 2006), and greater customer value (Guenzi & Troilo, 2006). This study, contributes to both the practice and academic body of knowledge by determining best practices to integrate marketing and sales organizations.

Watson's Integrated Marketing & Sales Best Practices Model (WIMS BP)

Through a review of academic literature, practices for integrating marketing and sales were identified and presented to a panel of experts to determine best practices for integrating marketing and sales in organizations (Figure 9). After three rounds of input using the Delphi technique, expert participants rated 11 best practices as important, resulting in the evolution of Figure 9 to the development of Watson's Integrated Marketing and Sales Best Practices (WIMS BP) model (Figure 40). Best practices are indicated by agreement level, as well as synergy, overlap, and impact on the marketing and sales functions (for details see Figure 9 description). Communication, a customer focus, strategic planning, clearly defined roles/responsibilities, and performance metrics, all of which were rated as extremely important (5) by all experts, are indicated in all capital bold. The next highest level of agreement, as rated by experts, included organizational knowledge, training and education, aligned rewards, and shared technology platforms, which are indicated in bold, upper and lower case letters. Organizational knowledge and lead management, also rated as important by experts, are indicated in n. Integrating marketing and sales in organizations may lead to increased efficiency, effectiveness, employee and customer satisfaction, and revenue, as indicated in bottom circle.

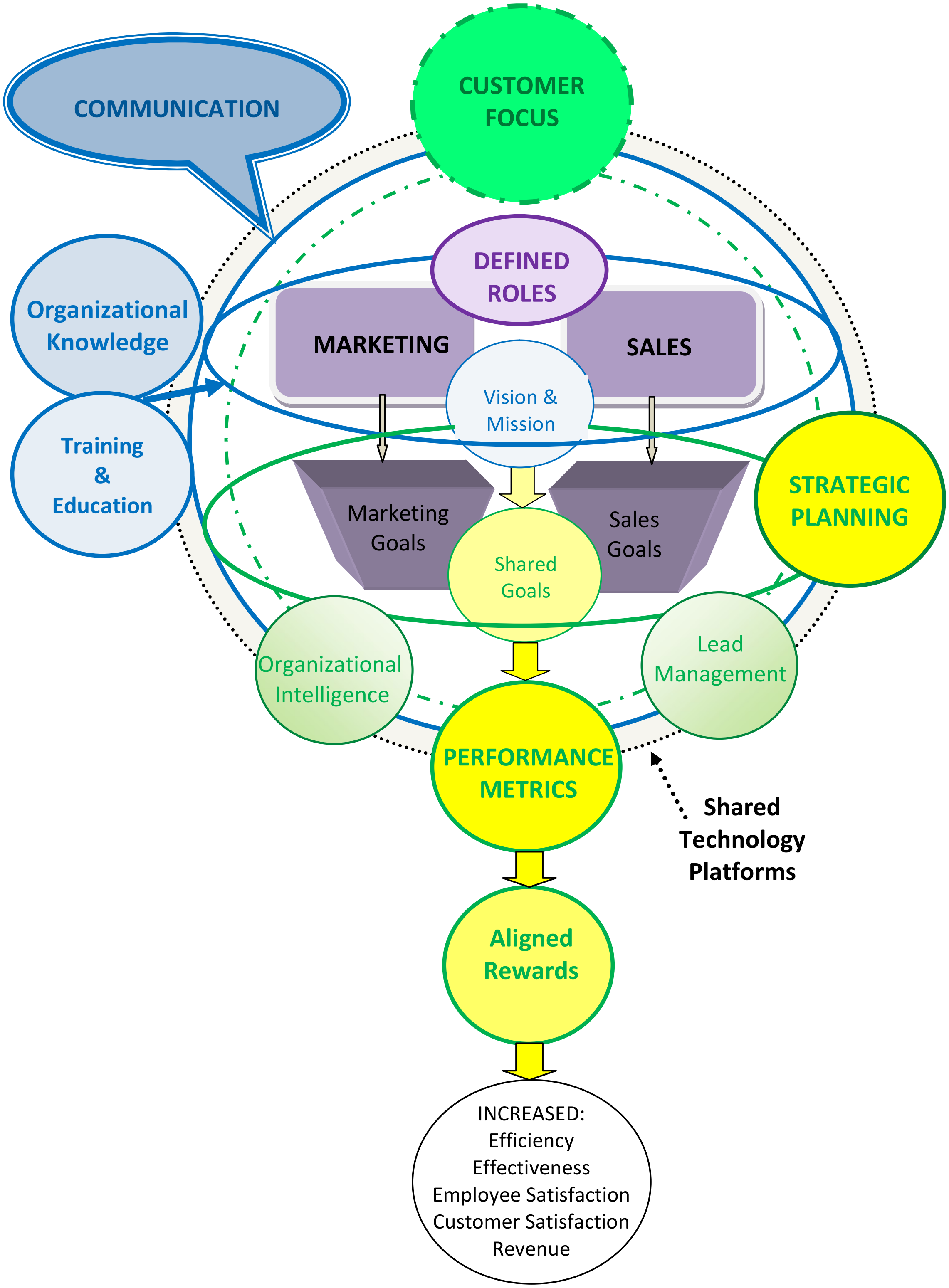


Figure 40. Watson's Integrated Marketing and Sales Best Practices (WIMS BP) model.

Implementing Best Practices for Integrating Marketing and Sales in Organizations

Although numerous methods could be used to integrate marketing and sales through the implementation of best practices determined in this study, communities of practice may be one approach worth considering. “Communities of practice are an ideal forum for sharing and spreading best practices across a company” (Wenger & Snyder, 2000, p. 141).

Communities of practice, a social theory of learning developed by Jean Lave and Etienne Wenger (Wenger, 2000), is a collection of people who engage on an ongoing basis in some common endeavor; groups of people informally bound together by shared expertise and passion for a joint enterprise (Wenger & Snyder, 2000); who share a concern or passion for something they do and learn how to do it better as they interact regularly (Wenger, 2000).

Communities of practice provide an approach which focuses on people and the social structures that enable them to learn with and from each other (Wenger, 2000). They play an important role in forming their members’ participation in, and orientation to, the world around them (Ekert, 2006). Communities of practice can drive strategy, generate new lines of business, solve problems, promote the spread of best practices, develop people’s professional skills, and help companies recruit and retain talent (Wenger & Snyder, 2000).

Two conditions of a community of practice are crucial: shared experiences over time, and a commitment to shared understanding (Ekert, 2006). Whether this mutual sense-making is consensual or conflictual, it is based on a commitment to mutual engagement and understanding of the engagement (Ekert, 2006). Three characteristics required for communities of practice include: the domain, the community, and the practice (Wegner, 2000). The community is defined by a shared domain of interest. In pursuing interest in their domain, members engage in joint activities and discussions to share information and help each other. They build relationships which enable them to learn from each other. Members are practitioners who develop a shared repertoire of resources: experiences, stories, tools, ways of addressing recurring problems – in short shared practice; which takes sustained interaction (Wegner, 2000). As highlighted below communities of practice encompass multiple characteristics and potential benefits (Table 11).

Table 11.
Key Characteristics and Benefits of Communities of Practice (Wegner, 2000)

➢ Communities of practice enable practitioners to take collective responsibility for managing the knowledge they need, recognizing that, given the proper structure, they are in the best position to do this.
➢ Communities among practitioners create a direct link between learning and performance, because the same people participate in communities of practice and in teams and business units.
➢ Practitioners can address the tacit and dynamic aspects of knowledge creation and sharing, as well as the more explicit aspects.
➢ Communities are not limited by formal structures: they create connections among people across organizational and geographic boundaries.

Implementing Best Practices for Integrating Marketing and Sales in Higher Education

While some posit many who study marketing in higher education (whether as a major or minor area of study) pursue careers in sales; whether or not this is by choice or circumstance continues to be debated. Regardless, in the last decade, universities in the United State have begun to launch sales certification programs. Typically housed in schools of business, many of these certificates develop from marketing programs.

With this shift, it would benefit business students, and help prepare them for their careers (regardless of their major), if higher education provides specific instruction on integrating marketing and sales in organizations including: roles and responsibilities of each function; barriers to integration; benefits of integration; as well as best practices for integrating functions. Additionally, seminar sessions focused on similar content could be developed for (and delivered to) students and practitioners.

Future Research

As this topic is just beginning to be explored by academic researchers, there are numerous opportunities for research. This particular study could be replicated in multiple ways including researching (comparing and contrasting): different geographic regions around the world; different ethnic cultures; different business models, industries, and segments; organizations with different reach, employee size, and revenue; and more.

In addition to more detailed research on barriers to integration (specific to marketing and sales), other research opportunities (specifically related to this study) include: exploring specific implementation strategies, tactics, and tools for each best practice for integrating marketing and sales determined in this study; as well as impact of regulatory compliance, structural alignment, culture (i.e., cultural analysis and alignment), leadership, and communication styles, on marketing and sales integration. Metrics that can be used to validate marketing and sales integration success (i.e. business performance; return on investment; efficiency and effectiveness; employee and customer satisfaction and engagement) should also be explored.

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APPENDIX A: AUTHORS REFERENCING BARRIERS TO INTEGRATING MARKETING AND SALES

Integration Barrier(s)	Author(s)
Conflict (11)	Madhani (2015); Atteya (2012); Le Meunier-FitzHugh & Piercy (2011, 2010, 2007); Dawes & Massey (2007, 2005); Aberdeen Group (2002); Arthur (2002); Dewsnap & Jobber (2002); Ruekert & Walker Jr (1987)
Role Ambiguity (12)	Lyus, Rogers, & Simms (2011); Troilo, De Luca, & Guenzi (2009); Kotler, Rackham, & Krishnaswamy (2006); Matthyssens & Johnston (2006); Dawes & Massey (2005); Krol (2003); Yandle & Blythe (2000); Colletti & Chonko (1997); Strahle, Spiro, & Acito (1996); Cespedes (1993); Singh (1993); Gupta, Raj, & Wilemon (1985)
Culture (10)	Malshe & Biemans (2015); Hughes, Bon, & Malshe (2012); Malshe & Sohi (2009); Oliva (2006); Beverland, Steel, & Dapiran (2006); Kotler, Rackham, & Krishnaswamy (2006); Dawes & Massey (2005); Van Der Vegt & Bunderson (2005); Dewsnap & Jobber (2002); Colletti & Chonko (1997)
Stereotypes (19) - individual characteristics - credibility & trust	Madhani (2015); Malshe & Biemans (2015); Biemans, Brenčič, & Malshe (2010); Malshe (2010); Homburg, Jensen, & Krohmer (2008); Biemans & Brenčič (2007); Homburg & Jensen (2007); Beverland, Steel, & Dapiran (2006); Dawes and Massey (2006); Matthyssens & Johnston (2006); Oliva (2006); Shapiro (2006, 2002); Dawes & Massey (2005); Rouziès, Anderson, Kohli, Michaels, Weitz, & Zoltners, (2005); Yandle & Blythe (2000); Montgomery & Webster (1997); Strahle, Spiro, & Acito (1996); Cespedes (1993)
Structure (12) - organizational - reporting	Madhani (2015); Malshe & Biemans (2015); Le Meunier-FitzHugh & Piercy (2008); Kotler, Rackham, & Krishnaswamy (2006); Oliva (2006); Dawes & Massey (2005); Rouziès, Anderson, Kohli, Michaels, Weitz, & Zoltners, (2005); Krol (2003); Shapiro (2002); Dewsnap & Jobber (2000); Griffin & Hauser (1996); Viswanathan & Olson (1992)
Communication (11)	Madhani (2015); Malshe & Biemans (2015); Le Meunier-FitzHugh & Piercy (2010, 2007); Moorman, Rossman, & Zoltners (2007); Matthyssens & Johnston (2006); Piercy (2006); Barki & Pinsonneault (2005); Ruekert & Walker Jr (1987); Menon, Bharadwaj, & Howell (1996); Cespedes (1993)
Organizational Knowledge (1)	Malshe & Biemans (2015)

Integration Barrier(s)	Author(s)
Customer Focus (3)	Madhani (2015); Biemans, Brenčič, & Malshe (2010); Peppers (2008)
Strategic Planning (15) - process - shared goals & objectives	Madhani (2015); Malshe (2009); Troilo, De Luca, & Guenzi (2009); Le Meunier-FitzHugh & Piercy (2007); Kotler, Rackham, & Krishnaswamy (2006); Matthyssens & Johnston (2006); Piercy (2006); (Dawes & Massey, 2005); Rouziès, Anderson, Kohli, Michaels, Weitz, & Zoltners, (2005); Dewsnap & Jobber (2002); Slater & Olson (2001); Lorge (1999); Colletti & Chonko (1997); Montgomery & Webster (1997); Strahle, Spiro, & Acito (1996)
Performance Metrics (6)	Malshe & Biemans (2015); Malshe (2010); Guenzi & Troilo (2006); Kotler, Rackham, & Krishnaswamy (2006); Rouziès, Anderson, Kohli, Michaels, Weitz, & Zoltners, (2005); Strahle, Spiro, & Acito (1996)
Rewards (6)	Malshe & Biemans (2015); Le Meunier-FitzHugh, Massey, & Piercy (2011); Kotler, Rackham, & Krishnaswamy (2006); Matthyssens & Johnston (2006); Rouziès, Anderson, Kohli, Michaels, Weitz, & Zoltners, (2005); Dewsnap & Jobber (2000)
Organizational Intelligence (4) - market, competitor, customer - systems & processes	Hughes, Bon, & Malshe (2012); Le Meunier-FitzHugh & Piercy (2007, 2006); Homburg & Pflesser (2000)
Lead Management/Demand Generation (5)	Biemans & Brenčič (2007); Smith, Gopalakrishna, & Chatterjee (2006); Donath (2004); Watkins (2003); Homburg & Pflesser (2000)

APPENDIX B: EXPERT PARTICIPANT EXPERIENCE DATA

Title	Organization	dates	industry	reach	model	bus type	employees
Vogel - Sales							
VP Indirect Sales	ADT	2017 2014	technology	US	B2C	private	20,000
VP Field Sales	Allstate	2014 2010	insurance	US	B2C	public	4,000
VP & General Manager Alternative Markets	Qwest	2010 2003	telecom	US	B2C	public	20,000
VP Global Operations	Goodyear Tire & Rubber Co	2003 1993	manufacturing	WW	B2B	Fortune 50	40,000
President & Managing Director	Goodyear International	1993 1983	manufacturing	WW	B2B	Fortune 50	35,000
(Total)	*(5)*	*(34)*					
Reinig - Customer Relationship Management & Sales							
Founder & CEO	Customer Relationship Strategies	2017 2013	services	US	B2B	private	1
Co-Founder & Facilitator	Technology Sales Leaders Forum	2017 2014	services	US	B2B	private	2
Sr. Advisor Sales Results	X-Consulting Group	2017 2014	services	US	B2B & B2C	private	4
VP Customer Management Sr. Advisor Sales Leadership Development	IHS	2013 2007	technology	WW	B2B	public	2500
Founder & CEO	Customer Relationship Strategies	2007 2004	services	US	B2B	private	1
Sr Director CRM	JD Edwards/ People Soft	2004 2002	technology	WW	B2B	public start-up	2,000
Sr Manager CRM	Cap Gemini Ernst & Young	2002 1997	consulting	US	B2B & B2C	private	8,000
CFO Controller Business Planner	AT&T	1997 1974	telecom	WW	B2B & B2C	public	200,000
(Total)	*(7)*	*(43)*					

Title	Organization	dates	industry	reach	model	bus type	employees
			Perez - C-Level Executive & Sales				
President & CEO	Terumo BCT	2017 2011	Healthcare medical devices	WW	B2B	public	5,800
President & CEO (2006)	CaridianBCT	2011 2008	Healthcare technology	WW	B2B	private	1,800
President (2000)	GambroBCT	2008 2000	Healthcare technology	WW	B2B	public	1,800
VP US Sales Global Marketing	GambroBCT	2000 1999	Healthcare technology	WW	B2B	public	1,600
VP Operations	UroTherapies	1999 1997	Healthcare Services	US	B2C	private	Not available
VP Western Operations	Haemonetics	1997 1995	Healthcare medical devices	WW	B2B	public	1,800
Area VP Western US	Coram Healthcare	1995 1989	Healthcare	US	B2B	private	4,500
Region/account Manager	Kendall Healthcare	1989 1981	Medical Devices	US	B2B	public	10,000+
(Total)	*(6)*	*(33)*					
			Peters - Marketing & Sales				
Practice Director & Senior Analyst	Enterprise Strategy Group	2017 2007	technology	WW	B2B	private	50
President	Peters Communication	2007 2006	services	WW	B2B	private start-up	1
Director Strategic Account Development	Sun Microsystems	2006 2005	technology	WW	B2B	public	30,000
Marketing Director	StorageTek	2005 1997	technology	WW	B2B	public	5,000
Marketing & Sales Director	StorageTek UK	1997 1989	technology	WW	B2B	public	5,000
Sales	Memorex Telex	1989 1986	technology	WW	B2B	private	1,000
Sales	Xerox	1986 1984	technology	WW	B2B	public	100,000
Marketing Manager	Williams Printers	1983	business services	UK	B2B	private	200
(Total)	*(7)*	*(34)*					

Title	Organization	dates	industry	reach	model	bus type	employees
Brouwer - Marketing							
SVP Sales	Washington Speakers Bureau	2017 2016	services	WW	B2B	Division of Fortune 500	35
Co-Founder & Managing Partner	Crew11	2017 2013	services	US	B2B	Private start-up	1
SVP Enterprise Products & Marketing	CenturyLink	2013 2012	technology	WW	B2B	Fortune 200	45,000
GM Converged Cloud Solutions	SAVVIS	2012 2008	technology	WW	B2B	Public	200
VP Partner & Program Management	Targus	2008 2007	technology	US	B2B	Small Private	5
Sr Director IP Products & Services	NeuStar	2007 2006	technology	US	B2B	Small Public	25
SVP Bus Dev & Marketing	SmartPipes / Endforce	2005 1999	technology	US	B2B	Private start-up	6
VP Product Marketing	WorldCom Advanced Networks / UUNet	1999 1998	technology	WW	B2B	Public	80,000
Director Product Marketing	CompuServe Network Services	1998 1990	technology	WW	B2B	Public	1,200
Sales Rep	Nynex	1990 1989	telecom	NY/US	B2B	Public	95,000
Marketing Rep	IBM	1989 1987	technology	WW	B2C	Public - Fortune 100	400,000
(Total)	*(11)*	*(30)*					

Title	Organization	dates	industry	reach	model	bus type	employees
			Researcher				
			Watson -Marketing				
Chief Marketing Officer	Pique	2017 2001	services	WW	B2B	private	
(Pique clients)	*Gambro BCT*	*2007*	*healthcare technology & manufacturing*	WW	*B2B*	*public*	*3,000*
	VersaCart		*manufacturing*	*US*	*B2B*	*private*	*15*
	Valen Technology		*technology*	*US*	*B2B*	*private start-up*	*20*
	StorageTek		*technology*	WW	*B2B*	*public*	*5,000*
	Fiberlink		*technology*	WW	*B2B*	*private start-up*	*300*
	NetLibrary		*technology*	*US*	*B2B/ B2C*	*private start-up*	*30*
	Online Computer Library Center		*technology*	WW	*B2B*	*private non-profit*	*1,200*
Director of International Corporate Marketing	Level 3	2001 2000	technology	WW	B2B	public start-up	5,000
Sr. Public Relations Manager	MCIWorldCom	2000 1999	technology	US	B2B	public	80,000
Global Public Relations Manager	WorldCom Advanced Networks / UUNet	1999 1998	technology	WW	B2B	public	50,000
Public Relations Manager	CompuServe Network Services	1998 1996	technology	WW	B2B	public	1,200
Marketing Manager	BancOne Services Corp	1996 1995	finance technology	US	B2B/B2C	public	80,000
Marketing Director	Electronic Vision	1995 1991	technology	US	B2B	private start-up	50
Marketing Director	Fuld Institute for Technology in Nursing Education	1995 1991	healthcare technology	WW	B2B	non-profit	30
Director of Public Relations	Columbus Cancer Clinic	1999 1989	healthcare	local	B2C	non-profit	25
Marketing, Advertising & Public Relations Coordinator	Ohio Valley Bank Company	1987 1986	finance	local	B2C/B2B	private	120
(Total)	*(17)*	*(29)*					

APPENDIX C: EMAIL INVITATION TO PARTICIPATE

(Protocol #16-6739HH – approved exempt 152-17h – July 2016)

(expert name entered here),

I hope you are doing well.

As I continue to work on completing my PhD in Organizational Performance and Change, at Colorado State University, I am seeking experts in marketing, sales, and related functions to participate in a study to help determine and rate best practices to integrate marketing and sales in organizations.

If you agree, your participation should require no more than 2-3 hours of your time; in total. The process is expected to include an interview and two to three rounds of email containing a brief questionnaire for you to rate best practices.

Please let me know if you are willing and able to participate in this research project for my dissertation.

Thank you,
Kristin Watson

APPENDIX D: PARTICIPATION CONSENT FORM

Consent to Participate in a Research Study
Colorado State University
(Protocol #16-6739HH – approved exempt 152-17h – July 2016)

TITLE OF STUDY: Best Practices to Integrate Marketing & Sales in Organizations

PRINCIPAL INVESTIGATOR: Gene Gloeckner, Ph.D., Professor, School of Education, gene.gloeckner@colostate.edu,

CO-PRINCIPAL INVESTIGATOR: Kristin Watson, PhD candidate, School of Education, piquekwatson@yahoo.com,.

WHY AM I BEING INVITED TO TAKE PART IN THIS RESEARCH?
You have been selected to participate in this research study based on your expertise and extensive experience working in (or with) sales and marketing.

WHO IS DOING THE STUDY?
Kristin Watson, PhD candidate, Colorado State University.

WHAT IS THE PURPOSE OF THIS STUDY?
The purpose of this study is to determine best practices for integrating marketing and sales in organizations.

WHERE IS THE STUDY GOING TO TAKE PLACE AND HOW LONG WILL IT LAST?
Initial meetings will take place in a mutually agreed upon convenient location, at which time you will be asked to complete a brief paper-based questionnaire, which should take approximately 10 minutes to complete. One to two rounds of email correspondence is expected to follow; requiring a total time commitment of no more than two hours over three to six months.

WHAT WILL I BE ASKED TO DO?
You will be asked to rate a list of best practices to integrate marketing and sales on a 5-point Likert scale ranging from 'not at all important' to 'extremely important'. After initial data are compiled, responses will be returned to participants via email, for further rating/ranking. Email rounds will continue until responses stabilize; when consensus or the least amount of disagreement is reached.

ARE THERE REASONS WHY I SHOULD NOT TAKE PART IN THIS STUDY?
There are no known reasons you would be excluded from this study, unless you are unwilling to share and/or have your 'expert opinion' published. All participants should have 20 or more years of professional experience working in sales, marketing, customer relationship management; or a related function.

WHAT ARE THE POSSIBLE RISKS AND DISCOMFORTS?
There are no known or perceived risks in participating in this study. It is not possible to identify all potential risks in research procedures, but the researcher has taken reasonable safeguards to minimize any known and potential, but unknown, risks.

ARE THERE ANY BENEFITS FROM TAKING PART IN THIS STUDY?
There may be no direct benefits to you for participating in this study. However, the anticipated identification of best practices to integrate marketing and sales, may benefit you in your current and/or future practice.

DO I HAVE TO TAKE PART IN THE STUDY?
Your participation in this research is voluntary. If you decide to participate in the study, you may withdraw your consent and stop participating at any time without penalty or loss of benefits to which you are otherwise entitled. Your expert opinion, based on your extensive experience in a sales, marketing, or related field will be invaluable to this study, assisting in future facilitation of marketing and sales integration and the advancement of the professions.

WHO WILL SEE THE INFORMATION THAT I GIVE?
We will keep private all research records that identify you, to the extent allowed by law.
Only the research team will have access to the questionnaires, which will be used for research purposes only.

Original data files and consent documents will be kept securely for a minimum of three (3) years, after the completion of the study, and stored by the researcher's advisor at CSU. Questionnaires will be destroyed after 10 years.

The research files may be shared for audit purposes with the CSU Institutional Review Board ethics committee, if necessary. The information you provide may be published in journal articles and/or researcher's dissertation. When we write about the study to share it with other researchers, we will write about the combined information gathered. If you prefer, you will not be identified in the written materials. We may publish the findings of this study; however, we will keep your name and other identifying information private upon your request.

Please initial below to indicate your preference of how your information can be shared.

___You can use my responses for research and publish my name with the data

___You can use my responses for research, but when you publish the results, do NOT publish my name

WHAT IF I HAVE QUESTIONS?
Before you decide whether to accept this invitation to take part in the study, please ask any questions that might come to mind now. Later, if you have questions about the study, you can contact the investigator, Kristin Watson at piquekwatson@yahoo.com. If you have any questions about your rights as a volunteer in this research, contact the CSU IRB at: RICRO_IRB@mail.colostate.edu; 970-491-1553. We will give you a copy of this consent form to take with you.

WHAT ELSE DO I NEED TO KNOW?
Participants will be requested to provide input on best practices for integrating marketing and sales, until responses stabilize; consensus or the least amount of disagreement is reached. You may also be asked to participate in a follow-up interview to provide insight on best practices indentified.

Please initial below to indicate your preferences for how your information can be shared.

___You can use my name and publish my responses in your dissertation.

___You can use my name and publish my responses in other journal articles.

___You can identify my responses by my name for data/record storage only.

___I prefer to remain anonymous and do not wish to allow my name to identify my responses and/or be published.

Your signature acknowledges that you have read the information stated and willingly sign this consent form. Your signature also acknowledges that you have received, on the date signed, a copy of this document containing 3 pages.

____
Printed name of person agreeing to take part in the study

____ __________________
Signature of person agreeing to take part in the study Date

Kristin R. Watson
____ __________________
Name of person providing information to participant Date

____ __________________
Signature of Research Staff Date

APPENDIX E: DELPHI ROUND 1 QUESTIONNAIRE

(Protocol #16-6739HH – approved exempt 152-17h – July 2016)

In an ideal situation, when marketing and sales are integrated, how important are the following practices to integrating marketing and sales and to what extent are they barriers to integration? By circling the corresponding number, please indicate the level of each.

1. **Communication** (consistent, high-quality, multidirectional) **between marketing and sales is important for integration.**

1	2	3	4	5
not at all				extremely

2. *Poor communication is often a barrier between marketing and sales.*

1	2	3	4	5
not at all				extremely

Any additional comments?

3. **A customer focus** (by both marketing and sales) **is important for integration.**

1	2	3	4	5
not at all				extremely

4. *Lack of a customer focus (by both marketing and sales) is often a barrier between marketing and sales.*

1	2	3	4	5
not at all				extremely

Any additional comments?

5. **Organizational knowledge** (awareness and understanding of vision, mission, goals, objectives, product and service offerings, key differentiators, and performance metrics of 'the organization', etc.) **by marketing and sales is important for integration.**

1	2	3	4	5
not at all				extremely

6. *Lack of awareness and understanding of organizational knowledge (by both marketing and sales) is often a barrier between marketing and sales.*

1	2	3	4	5
not at all				extremely

Any additional comments?

7. **Clarifying** (functional and individual) **roles, responsibilities, and expectations of marketing and sales is important for integration.**

1 not at all | 2 | 3 | 4 | 5 extremely

8. *Role ambiguity, including lack of clearly defined roles, responsibilities, and expectations of marketing and sales are often barriers between marketing and sales.*

1 not at all | 2 | 3 | 4 | 5 extremely

Any additional comments?

9. **Strategic planning** (developing and executing strategies i.e. goals, objectives, tactics, timeline, effectiveness evaluation, and budget) **is important for integration.**

1 not at all | 2 | 3 | 4 | 5 extremely

10. *Lack of strategic planning (by both marketing and sales) is often a barrier between marketing and sales.*

1 not at all | 2 | 3 | 4 | 5 extremely

11. *The strategic planning process is often a barrier between marketing and sales.*

1 not at all | 2 | 3 | 4 | 5 extremely

Any additional comments?

12. **Performance metrics for marketing and sales** (individuals and teams) **are important for integration.**

1 not at all | 2 | 3 | 4 | 5 extremely

13. *Lack of performance metrics (for both marketing and sales) are often barriers between marketing and sales.*

1 not at all | 2 | 3 | 4 | 5 extremely

Any additional comments?

14. **Shared and/or aligned rewards for marketing and sales accomplishments are important for integration.**

1 not at all | 2 | 3 | 4 | 5 extremely

15. *Rewards that are not shared and/or aligned often create barriers between marketing and sales.*

1	2	3	4	5
not at all				extremely

Any additional comments?

16. Gathering and distributing intelligence (market, customer, and competitive) **is important for integration.**

1	2	3	4	5
not at all				extremely

17. *Lack of market, customer, and competitive intelligence is often a barrier between marketing and sales.*

1	2	3	4	5
not at all				extremely

18. *Intelligence gathering and distribution processes are often barriers between marketing and sales.*

1	2	3	4	5
not at all				extremely

Any additional comments?

19. Lead management (generating, qualifying, and follow-up) **is important for integration.**

1	2	3	4	5
not at all				extremely

20. *Lead management is often a barrier between marketing and sales.*

1	2	3	4	5
not at all				extremely

Any additional comments?

21. Are there any other items which should be considered as best practices to integrate marketing and sales which are not already listed? *Please describe.*

22. Are there any other (common) barriers to integrating marketing and sales which are not listed? *Please describe.*

APPENDIX F: DELPHI ROUND 1 EXPERT INTEGRATION BARRIERS DATA

Barriers to Integrating Marketing and Sales

	Barrier	Rating				
		not at all				*extremely often*
(1)	**Poor Communication**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					5
	JR (CRM & S)				4	
	JV (S)				4	
	DB (M)					5
	MP (S&M)				4	
	Total Each				*(3)*	*(2)*
(2)	**Lack of Customer Focus**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					5
	JR (CRM & S)					5
	JV (S)				4	
	DB (M)				4	
	MP (S&M)		**2**			
	Total Each		*(1)*		*(2)*	*(2)*
(4)	**Lack of Organizational Knowledge**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					5
	JR (CRM & S)				4	
	JV (S)			3		
	DB (M)					5
	MP (S&M)			3		
	Total Each			*(2)*	*(1)*	*(2)*
(5)	**Roles Ambiguity**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					5
	JR (CRM & S)					5
	JV (S)				4	
	DB (M)					5
	MP (S&M)				4	
	Total Each				*(2)*	*(3)*

(6)	**Lack of Strategic Planning**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					5
	JR (CRM & S)				4	
	JV (S)					5
	DB (M)				4	
	MP (S&M)			3		
	Total Each			*(1)*	*(2)*	*(2)*
(7)	**Strategic Planning Process**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)			3		
	JR (CRM & S)				4	
	JV (S)				4	
	DB (M)		2			
	MP (S&M)			3		
	Total Each		*(1)*	*(2)*	*(2)*	
(8)	**Performance Metrics**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					5
	JR (CRM & S)					5
	JV (S)				4	
	DB (M)				4	
	MP (S&M)					5
	Total Each				*(2)*	*(3)*
(9)	**Rewards Not Shared/Aligned**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)		2			
	JR (CRM & S)					5
	JV (S)					5
	DB (M)					5
	MP (S&M)				4	
	Total Each		*(1)*		*(1)*	*(3)*
(10)	**Lack of Market, Customer, & Competitive Intelligence**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					5
	JR (CRM & S)				4	
	JV (S)				4	
	DB (M)			3		
	MP (S&M)				4	
	Total Each			*(1)*	*(3)*	*(1)*

(11)	Intelligence Gathering and Distribution Processes	1	2	3	4	5
	DP (CEO & S)				4	
	JR (CRM & S)				4	
	JV (S)		2			
	DB (M)		2			
	MP (S&M)					
	Total Each		*(2)*		*(2)*	*(1)*
(12)	**Lead Management**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)				4	
	JR (CRM & S)					5
	JV (S)			3		
	DB (M)				4	
	MP (S&M)				4	
	Total Each			*(1)*	*(3)*	*(1)*

	Other Barriers	
	DP (CEO & S)	capacity planning & project management
	JR (CRM & S)	culture
	JV (S)	leadership styles
	DB (M)	lack of trust & confidence in other's work
	MP (S&M)	common language/terminology & lack of effort

APPENDIX G: DELPHI ROUND 1 EXPERT INTEGRATION BEST PRACTICES DATA

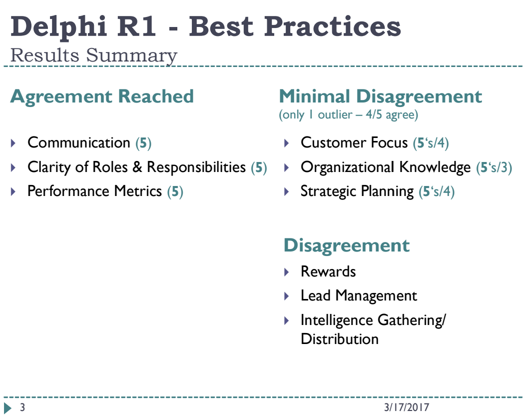
Best Practices for Integrating Marketing and Sales

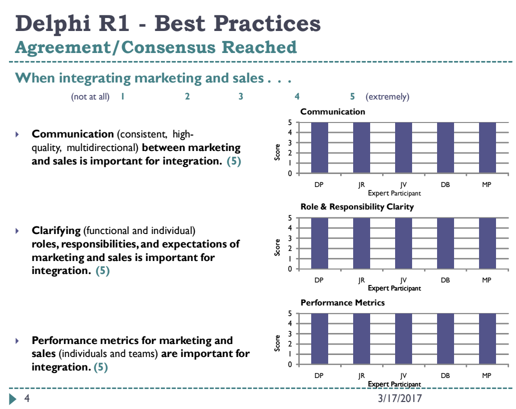
	Best Practice	Rating				
		not at all important				*extremely important*
(1)	**Communication**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					5
	JR (CRM & S)					5
	JV (S)					5
	DB (M)					5
	MP (S&M)					5
	Total Each					*(5)*
(2)	**Customer Focus**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					5
	JR (CRM & S)					5
	JV (S)					5
	DB (M)				4	
	MP (S&M)					5
	Total Each				*(1)*	*(4)*
(3)	**Organizational Knowledge**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					5
	JR (CRM & S)					5
	JV (S)					5
	DB (M)					5
	MP (S&M)			3		
	Total Each			*(1)*		*(4)*
(4)	**Clearly Defined Roles**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					5
	JR (CRM & S)					5
	JV (S)					5
	DB (M)					5
	MP (S&M)					5
	Total Each					*(5)*
(5)	**Strategic Planning**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					5
	JR (CRM & S)					5
	JV (S)					5
	DB (M)				4	
	MP (S&M)					5
	Total Each				*(1)*	*(4)*

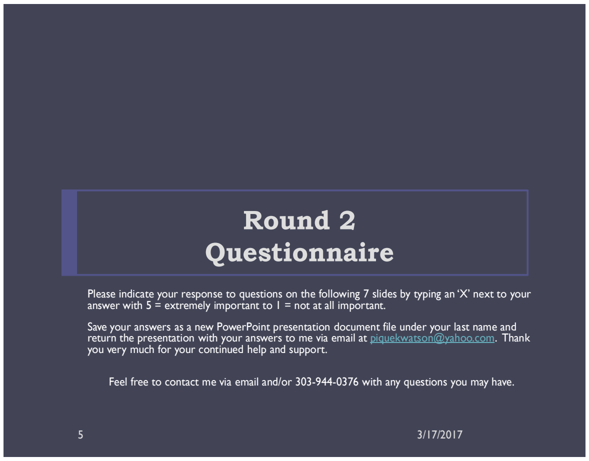
		1	2	3	4	5
(6)	**Performance Metrics**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					5
	JR (CRM & S)					5
	JV (S)					5
	DB (M)					5
	MP (S&M)					5
	Total Each					*(5)*
(7)	**Shared/Aligned Rewards**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)			3		
	JR (CRM & S)					5
	JV (S)				4	
	DB (M)					5
	MP (S&M)					5
	Total Each			*(1)*	*(1)*	*(3)*
(8)	**Intelligence** (Gathering & Distributing)	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)				4	
	JR (CRM & S)				4	
	JV (S)					5
	DB (M)			3		
	MP (S&M)		2			
	Total Each		*(1)*	*(1)*	*(2)*	*(1)*
(9)	**Lead Management**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					5
	JR (CRM & S)					5
	JV (S)					5
	DB (M)				4	
	MP (S&M)		2			
	Total Each		*(1)*		*(1)*	*(3)*

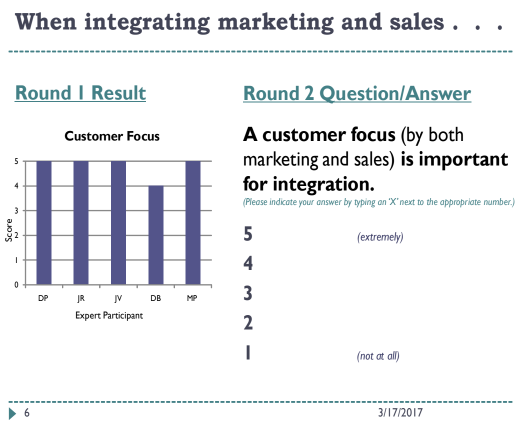
Other Best Practices		
	DP (CEO & S)	Training & Regulatory Compliance
	JR (CRM & S)	Shared Technology Platforms & Appt Setting Process
	JV (S)	Training/Education
	DB (M)	Clear & compelling vision of future
	MP (S&M)	Sales should work for/report to marketing

APPENDIX H: DELPHI ROUND 2 QUESTIONNAIRE









When integrating marketing and sales . . .

Round 1 Result

Round 2 Question/Answer

Organizational knowledge (awareness and understanding of vision, mission, goals, objectives, product and service offerings, key differentiators, and performance metrics of 'the organization', etc.) **by marketing and sales is important for integration.**

(Please indicate your answer by typing an 'X' next to the appropriate number.)

5 *(extremely)*
4
3
2
1 *(not at all)*

When integrating marketing and sales . . .

Round 1 Result

Round 2 Question/Answer

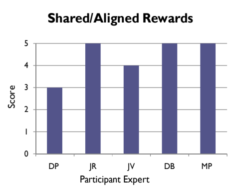
Strategic planning (developing and executing strategies i.e. goals, objectives, tactics, timeline, effectiveness evaluation, and budget) **is important for integration.**

(Please indicate your answer by typing an 'X' next to the appropriate number.)

5 *(extremely)*
4
3
2
1 *(not at all)*

When integrating marketing and sales . . .

Round 1 Result



Round 2 Question/Answer

Shared and/or aligned rewards for marketing and sales accomplishments are important for integration.

(Please indicate your answer by typing an 'X' next to the appropriate number.)

5 *(extremely)*
4
3
2
1 *(not at all)*

When integrating marketing and sales . . .

Round 1 Result

Round 2 Question/Answer

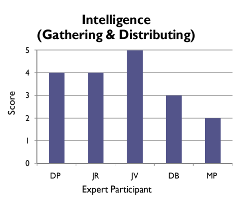
Lead management (generating, qualifying, and follow-up) **is important for integration.**

(Please indicate your answer by typing an 'X' next to the appropriate number.)

5 *(extremely)*
4
3
2
1 *(not at all)*

When integrating marketing and sales . . .

Round 1 Result



Round 2 Question/Answer

Gathering and distributing intelligence (market, customer, and competitive) **is important for integration.**

(Please indicate your answer by typing an 'X' next to the appropriate number.)

5 *(extremely)*
4
3
2
1 *(not at all)*

New Questions

Best Practices Suggested by Experts (In Round 1)

In an ideal situation, when marketing and sales are integrated, how important are the following practices to integrating marketing and sales?

When integrating marketing and sales . . .

*(Please indicate your answer by typing an 'X' **UNDER** the appropriate number for EACH question below.)*

1. Training and education are important for integration.
   (not at all) **1** **2** **3** **4** **5** (extremely)
2. Sales reporting to marketing is important for integration.
   (not at all) **1** **2** **3** **4** **5** (extremely)
3. Regulatory compliance is important for integration.
   (not at all) **1** **2** **3** **4** **5** (extremely)
4. Shared technology platforms are important for integration.
   (not at all) **1** **2** **3** **4** **5** (extremely)
5. Shared appointment setting processes are important for integration.
   (not at all) **1** **2** **3** **4** **5** (extremely)

APPENDIX I: DELPHI ROUND 2 EXPERT INTEGRATION BEST PRACTICES DATA

Comparing Round 1 Data to Round 2

Round 1 responses indicted by ( )

	Best Practice	Rating				
		not at all important				*extremely important*
(1)	**Communication**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					(5)
	JR (CRM & S)					(5)
	JV (S)					(5)
	DB (M)					(5)
	MP (S&M)					(5)
	R1 Total Each					*(5)*
(2)	**Clearly Defined Roles**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					(5)
	JR (CRM & S)					(5)
	JV (S)					(5)
	DB (M)					(5)
	MP (S&M)					(5)
	R1 Total Each					*(5)*
(3)	**Performance Metrics**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					(5)
	JR (CRM & S)					(5)
	JV (S)					(5)
	DB (M)					(5)
	MP (S&M)					(5)
	R1 Total Each					*(5)*
(4)	**Customer Focus**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					(5) **5**
	JR (CRM & S)					(5) **5**
	JV (S)					(5) **5**
	DB (M)				(4)	**5**
	MP (S&M)					(5) **5**
	R2 Total Each					*(5)*

(5)	**Strategic Planning**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					(5) **5**
	JR (CRM & S)					(5) **5**
	JV (S)					(5) **5**
	DB (M)				(4)	**5**
	MP (S&M)					(5) **5**
	R2 Total Each					*(5)*
(6)	**Organizational Knowledge**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					(5) **5**
	JR (CRM & S)					(5) **5**
	JV (S)				**4**	(5)
	DB (M)					(5) **5**
	MP (S&M)			(3)	**4**	
	R2 Total Each				*(2)*	*(3)*
(7)	**Lead Management**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)				**4**	(5)
	JR (CRM & S)					(5) **5**
	JV (S)				**4**	(5)
	DB (M)				(4)	**5**
	MP (S&M)		(2)	**3**		
	R2 Total Each			*(1)*	*(2)*	*(2)*
(8)	**Shared/Aligned Rewards**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)			(3)	**4**	
	JR (CRM & S)					(5) **5**
	JV (S)			**3**	(4)	
	DB (M)					(5)
	MP (S&M)					(5) **5**
	R2 Total Each			*(1)*	*(1)*	*(3)*
(9)	**Intelligence** (Gathering & Distributing)	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)				(4)	**5**
	JR (CRM & S)				(4) **4**	
	JV (S)					(5) **5**
	DB (M)			(3)	**4**	
	MP (S&M)		(2)	**3**		
	R2 Total Each			*(1)*	*(2)*	*(2)*

	Expert Suggested Best Practices *(blue initials indicate participant who suggested practice)*					
(10)	**Training & Education**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					**5**
	JR (CRM & S)					5
	JV (S)				**4**	
	DB (M)			3		
	MP (S&M)				4	
	R2 Total Each			*(1)*	*(2)*	*(2)*
(11)	**Sales Reporting to Marketing**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)	1				
	JR (CRM & S)					5
	JV (S)					5
	DB (M)	1				
	MP (S&M)			**3**		
	R2 Total Each	*(1)*		*(1)*		*(2)*
(12)	**Regulatory Compliance**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					**5**
	JR (CRM & S)			3		
	JV (S)		2			
	DB (M)			3		
	MP (S&M)	1				
	R2 Total Each	*(1)*	*(1)*	*(2)*		
(13)	**Shared Technology Platforms**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)				4	
	JR (CRM & S)					**5**
	JV (S)				4	
	DB (M)					5
	MP (S&M)					5
	R2 Total Each				*(2)*	*(3)*
(14)	**Shared Appointment Setting Processes**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)		2			
	JR (CRM & S)				**4**	
	JV (S)		2			
	DB (M)			3		
	MP (S&M)			3		
	R2 Total Each		*(2)*	*(2)*	*(1)*	

APPENDIX J: DELPHI ROUND 3 QUESTIONNAIRE

Best Practices for Integrating Marketing & Sales

Round 1 & 2 Results & Round 3 Questionnaire

March 31, 2017

Your answers to previous rounds are indicated in the bar charts. The **blue bar** indicates 1st round responses, and the yellow bar indicates 2nd round responses in the first four slides. You have only rated the next five slides once, since they were best practices suggested by experts. Consequently, those slides contain only one bar.

Please indicate your response to questions on the following 9 slides by typing an 'X' next to your answer with 5 = extremely important to 1 = not at all important.

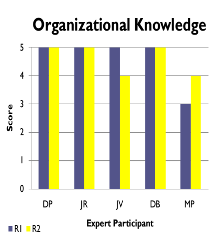
Save your answers as a new PowerPoint presentation document file under your last name and return the presentation with your answers to me via email at piquekwatson@yahoo.com.

Thank you very much for your continued help and support!

Feel free to contact me via email piquekwatson@yahoo.com and/or 303-944-0376 with any questions you may have.

When integrating marketing and sales . . .

Round 1 & 2 Results



Round 3 Question/Answer

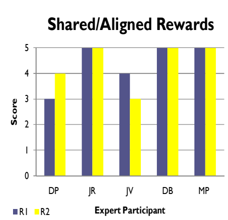
Organizational knowledge (awareness and understanding of vision, mission, goals, objectives, product and service offerings, key differentiators, and performance metrics of 'the organization', etc.) **by marketing and sales is important for integration.**

(Please indicate your answer by typing an 'X' next to the appropriate number.)

5 *(extremely)*
4
3
2
1 *(not at all)*

When integrating marketing and sales . . .

Round 1 & 2 Results



Round 3 Question/Answer

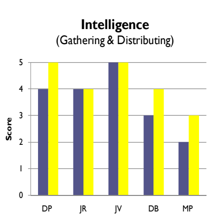
Shared and/or aligned rewards for marketing and sales accomplishments are important for integration.

(Please indicate your answer by typing an 'X' next to the appropriate number.)

5 *(extremely)*
4
3
2
1 *(not at all)*

When integrating marketing and sales . . .

Round 1 & 2 Results



Round 3 Question/Answer

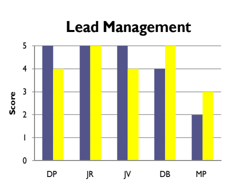
Gathering and distributing intelligence (market, customer, and competitive) **is important for integration.**

(Please indicate your answer by typing an 'X' next to the appropriate number.)

5 *(extremely)*
4
3
2
1 *(not at all)*

When integrating marketing and sales . . .

Round 1 & 2 Results



Round 3 Question/Answer

Lead management (generating, qualifying, and follow-up) **is important for integration.**

(Please indicate your answer by typing an 'X' next to the appropriate number.)

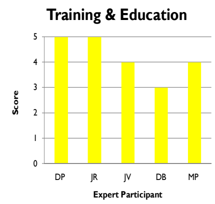
5 *(extremely)*
4
3
2
1 *(not at all)*

Expert Suggested
Best Practices For Integrating
Marketing & Sales

(second rating)

When integrating marketing and sales . . .

Round 1 & 2 Results



Round 3 Question/Answer

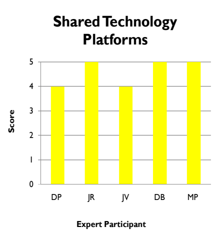
Training and education are important for integration.

(Please indicate your answer by typing an 'X' next to the appropriate number.)

5 *(extremely)*
4
3
2
1 *(not at all)*

When integrating marketing and sales . . .

Round 1 & 2 Results



Round 3 Question/Answer

Shared technology platforms are important for integration.

(Please indicate your answer by typing an 'X' next to the appropriate number.)

5 *(extremely)*
4
3
2
1 *(not at all)*

When integrating marketing and sales . . .

Round 1 & 2 Results

Round 3 Question/Answer

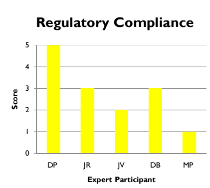
Sales reporting to marketing is important for integration.

(Please indicate your answer by typing an 'X' next to the appropriate number.)

5 *(extremely)*
4
3
2
1 *(not at all)*

When integrating marketing and sales . . .

Round 1 & 2 Results



Round 3 Question/Answer

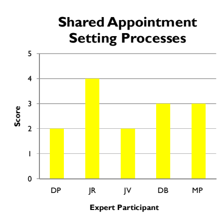
Regulatory compliance is important for integration.

(Please indicate your answer by typing an 'X' next to the appropriate number.)

5 *(extremely)*
4
3
2
1 *(not at all)*

When integrating marketing and sales . . .

Round 1 & 2 Results



Round 3 Question/Answer

Shared appointment setting processes are important for integration.

(Please indicate your answer by typing an 'X' next to the appropriate number.)

5 *(extremely)*
4
3
2
1 *(not at all)*

APPENDIX K: DELPHI ROUND 3 EXPERT BEST PRACTICES DATA

Comparing Three Rounds of Data Collection

Round 1 responses indicted by ( ); Round 2 indicated by purple; Round 3 indicated by green
Final opinions in bold

	Best Practice	Rating				
		not at all important				*extremely important*
(1)	Communication	1	2	3	4	5
	DP (CEO & S)					(5)
	JR (CRM & S)					(5)
	JV (S)					(5)
	DB (M)					(5)
	MP (S&M)					(5)
	R1 Total Each					*(5)*
(2)	Clearly Defined Roles & Responsibilities	1	2	3	4	5
	DP (CEO & S)					(5)
	JR (CRM & S)					(5)
	JV (S)					(5)
	DB (M)					(5)
	MP (S&M)					(5)
	R1 Total Each					*(5)*
(3)	Performance Metrics	1	2	3	4	5
	DP (CEO & S)					(5)
	JR (CRM & S)					(5)
	JV (S)					(5)
	DB (M)					(5)
	MP (S&M)					(5)
	R1 Total Each					*(5)*
(4)	Customer Focus	1	2	3	4	5
	DP (CEO & S)					(5) **5**
	JR (CRM & S)					(5) **5**
	JV (S)					(5) **5**
	DB (M)				(4)	**5**
	MP (S&M)					(5) **5**
	R2 Total Each					*(5)*

(5)	**Strategic Planning**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					(5) **5**
	JR (CRM & S)					(5) **5**
	JV (S)					(5) **5**
	DB (M)				(4)	**5**
	MP (S&M)					(5) **5**
	R2 Total Each					***(5)***
(6)	**Organizational Knowledge**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					(5) 5 **5**
	JR (CRM & S)					(5) 5 **5**
	JV (S)				4	(5) **5**
	DB (M)					(5) 5 **5**
	MP (S&M)			(3)	4 **4**	
	R3 Total Each				***(1)***	***(4)***
(7)	**Shared/Aligned Rewards**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)			(3)	4	**5**
	JR (CRM & S)					(5) 5 **5**
	JV (S)			3	(4) **4**	
	DB (M)					(5) 5 **5**
	MP (S&M)					(5) 5 **5**
	R3 Total Each				*(1)*	*(4)*
(8)	**Intelligence** (Gathering & Distributing)	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)				(4)	5 **5**
	JR (CRM & S)				(4) 4	**5**
	JV (S)				**4**	(5) 5
	DB (M)			(3)	4 **4**	
	MP (S&M)		(2)	3 **3**		
	R3 Total Each			*(1)*	*(2)*	*(2)*
(9)	**Lead Management**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)			**3**	4	(5)
	JR (CRM & S)					(5) 5 **5**
	JV (S)				4 **4**	(5)
	DB (M)				(4)	5 **5**
	MP (S&M)		(2)	3 **3**		
	R3 Total Each			*(2)*	*(1)*	*(2)*

	Expert Suggested Best Practices *(blue initials indicate participant who suggested practice)*					
(10)	**Shared Technology Platforms**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)				4 **4**	
	JR (CRM & S)					5 **5**
	JV (S)				4	**5**
	DB (M)					5 **5**
	MP (S&M)					5 **5**
	R3 Total Each				*(1)*	*(4)*
(11)	**Training & Education**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					5 **5**
	JR (CRM & S)					5 **5**
	JV (S)				4 **4**	
	DB (M)			3	**4**	
	MP (S&M)				4 **4**	
	R3 Total Each				*(3)*	*(2)*
(12)	**Shared Appointment Setting Processes**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)		2 **2**			
	JR (CRM & S)		**2**		4	
	JV (S)		2	**3**		
	DB (M)		**2**	3		
	MP (S&M)			3 **3**		
	R3 Total Each		*(3)*	*(2)*		
(13)	**Sales Reporting to Marketing**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)	1 **1**				
	JR (CRM & S)					5 **5**
	JV (S)				**4**	5
	DB (M)	1 **1**				
	MP (S&M)			3 **3**		
	R3 Total Each	*(2)*		*(1)*	*(1)*	*(1)*
(14)	**Regulatory Compliance**	**1**	**2**	**3**	**4**	**5**
	DP (CEO & S)					5 **5**
	JR (CRM & S)			3 **3**		
	JV (S)		2	**3**		
	DB (M)		**2**	3		
	MP (S&M)	1 **1**				
	R3 Total Each	*(1)*	*(1)*	*(2)*		*(1)*

APPENDIX L: RESEARCH TIMELINE

1. Conducted literature search to identify integration best practices – 2015-2016

2. Developed list of 'best practices' (informed by literature) – March 2016

3. Secured/confirmed 'expert' participation – April 2016

4. Submitted and received IRB approval for Delphi 'Best Practices' Likert questionnaire – July 2016 (Protocol #16-6739HH – approved exempt 152-17h)

5. Conducted interview and administered Delphi round 1 questionnaire (in person/face to face) to participant #1 – September 28, 2016.

6. Conducted interview and administered Delphi round 1 questionnaire (in person/face to face) to participant #2 – September 29, 2016.

7. Conducted interview and administered Delphi round 1 questionnaire (in person/face to face) to participant #3 – September 30, 2016.

8. Conducted interview and administered Delphi round 1 questionnaire (in person/face to face) to participant #4 – September 30, 2016.

9. Conducted interview and administered Delphi round 1 questionnaire (in person/via telephone) to participant #5 – October 7, 2016.

10. Synthesized and analyzed questionnaire responses – October–November 2016.

11. Searched and updated literature sources – February 2017.

12. Developed and distributed round two Delphi questionnaire. Sent via email to expert participants – March 21, 2017.

13. Sent follow-up email reminder requests to two experts whom have not responded or returned completed questionnaire – March 26, 2017

14. All round two questionnaires received from expert participants -- March 28, 2017

15. Synthesized and analyzed round 2 responses – March 28, 2017.

16. Developed and distributed round three Delphi questionnaire. Sent via email to expert participants – March 31, 2017.

17. Data collection completed. Responses stabilized (least amount of disagreement was reached) on best practices to integrate marketing and sales – April 10, 2017.

18. Distributed final best practices for integration marketing and sales findings to expert participants – April 14, 2017.

APPENDIX M: COMMUNICATION TOOLS

Messaging/Communication Tools

Messaging Tools/ Platforms	Message Priority	Message Category/Type/Topic	* Audiences Targeted & Influenced	Distribution Method	Frequency
**** Bold indicates the audience the message is intended for,*** *while other audiences that may be exposed to the message (but for whom the message is not necessarily intended) are not bold. Italics represents 'potential' exposure.*					
News Releases	1	• New Product/Service • Market Launch • New Strategic Initiative • Tier One Customer Wins • Tier One Partnerships/ Alliances • Significant Product/Service Update • Quarterly Performance • Strategic Philanthropy	• **Media** • Analysts • Employees • Customers • Community • Shareholders • Partners	• Wire • Email • Website	As needed weekly
News Alerts	2/3	• Product/Service Update • Events • Awards • Community Support/Activities	• **Media** • Analysts • Employees • Customers • Community • Shareholders • Partners	• Email	As needed
Pitches	2	• Customer Solutions • Industry Initiatives	• **Media** • Analysts • Employees • Customers • Community • Shareholders • Partners	• Telephone	As needed
News Conferences	1	• New Product or Service(s) • Market Launch(s) • New Strategic Initiative(s)	• **Media** • **Analysts** • Customers • Community • Shareholders • Partners	• In person	As needed quarterly

Messaging Tools/ Platforms	Message Priority	Message Category/Type/Topic	* Audiences Targeted & Influenced	Distribution Method	Frequency
Briefings	2/3	• Product/Service Update • Industry Positioning • Strategic Update	• **Media** • **Analysts** • Employees • Customers • Shareholders • Partners	• Telephone • Road shows • Telephone • Webcasts • Press conferences	As needed daily
Inquiries/ Interviews	1/2	• Product/Service Update • Industry Positioning • Strategic Updates • Customer Wins • Partnerships/ Alliances • Financial Performance/ shareholder value	• **Media** • **Analysts** • **Shareholders** • Employees • Customers • Partners	• Telephone • Email	As needed daily
Editorial Opportunities	all	• Product/Services • Industry Views/ Positioning • Strategic initiatives	• **Media** • **Analysts** • Employees • Customers • Shareholders • Partners • Community	• Telephone Interviews • Email	As available monthly
Q & A's & Talking Points	all	• Key Messages • Issues • Product/Service Updates • Industry Positioning • Strategic Updates	• **Media** • **Analysts** • **Employees** • **Customers** • **Shareholders** • **Partners** • **Community**	• Soft copy • Hard copy • Telephone • In person	As needed
Power Point Presentations	1	• Corporate Overview • Corporate Strategy • New Product/ Service(s) • New Initiative(s) • Market Launch	• **Media** • **Analysts** • **Employees** • **Customers** • **Shareholders** • **Partners** • **Community**	• Road shows • Briefings • Speaking Engagements	As needed
Webcasts	1/2	• New Product/ Service • Market Launch • New Strategic Initiative • Significant Product/ Service Update	• **Media** • **Analysts** • **Employees** • **Shareholders** • **Partners** • Customers • Community	• Web	As needed quarterly

Messaging Tools/ Platforms	Message Priority	Message Category/Type/Topic	* Audiences Targeted & Influenced	Distribution Method	Frequency
Website		• Corporate Overview • Corporate Strategy • Product/Service(s) • Initiative(s) • Industry Positioning • Strategic Updates • Customer Wins • Partnerships/Alliances • Financial Performance/ Shareholder Value • Events • Awards	• **Media** • **Analysts** • **Employees** • **Customers** • **Shareholders** • **Partners** • **Community**	• Electronic	
Newsletters	2/3	• Product/Service Updates • Customer Wins • Partnerships/Alliances	• **Employees** • ***Media*** • ***Analysts*** • ***Customers*** • ***Partners*** • Community • Shareholders	• Email	monthly
Speaking Engagements	1/2	• Product/Services • Corporate/Industry Positioning • Strategic Initiatives	• **Customers** • **Community** • Media • Analysts • Employees • Shareholders • Partners	• Conferences/ Seminars • Community Events	As needed
Earnings		• Financial Performance • Industry Positioning • Strategic Initiatives • Product/Services Update • Metrics Update	• **Shareholders** • **Employees** • **Media** • **Analysts** • Community • Customers • Partners	• Telephone Calls • News Release	Quarterly
Backgrounder		• Company Overview • Products & Services	• **Media** • Analysts • Employees • Customers • Shareholders • Partners • Community	• Hard copy • Email • Website	

Messaging Tools/ Platforms	Message Priority	Message Category/Type/Topic	* Audiences Targeted & Influenced	Distribution Method	Frequency
White Papers		• Industry Insight/Positioning • Strategic Initiatives	• **Media** • **Analysts** • **Customers** • Employees • Shareholders • Partners	• Hard copy • Email • Website	As needed
Collateral		• Corporate Overview • Products & Services • Customer Wins	• **Customers** • Employees • Media • Analysts • Shareholders • Partners • Community	• Website • Hard copy	
Tradeshows & Conferences		• Products & Services • Initiatives	• **Customers** • Media • Analysts • Partners • *Shareholders* • *Employees* • *Community*	• In person	
Events		• Corporate Overview Positioning • Products & Services • Community Support	• Customers • Employees • Community • Media • Analysts • Shareholders • Partners	• In person	
Memos		• Corporate Updates	• **Employees** • Media • Analysts • Customers • Community • Shareholders • Partners	• Email	
Meetings					
Financial Analyst Meeting		• Product/Services Update • Industry Positioning • Strategic Initiatives • Metrics Update	• **Shareholders** • Media • Analysts • Employees	• In person	Annual
Shareholder Meeting		• Product/Services Update • Industry Positioning • Strategic initiatives • Metrics Update	• **Shareholders** • *Media* • *Analysts* • *Employees*	• In person	Annual

Messaging Tools/ Platforms	Message Priority	Message Category/Type/Topic	* Audiences Targeted & Influenced	Distribution Method	Frequency
All Hands/ Company Meetings		• Corporate Strategy • Strategic Initiatives • Metrics Update • Organizational Updates • Product/Services Update • Industry Positioning	• **Employees**	• In person	
Cascading Meetings		• Organizational Updates • Initiatives	• **Employees**	• In person	
Department Meetings		• Corporate Strategy • Strategic Initiatives • Metrics Update • Organizational Updates • Product/Services Update • Departmental Strategy & Tactics	• **Employees**	• In person • Conf calls	