Getting Sales To Use Marketing Collateral

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Introduction

Marketing professionals often ask me how they can get the sales team to actually use the collateral they create. If you’re a marketer and find yourself facing this conundrum, trust me, you are not alone. While this seems like a struggle that has gone on since the very earliest days of marketing, I would like to make the argument that there is a very easy solution to this problem – involve the sales team in the creation of marketing collateral.

“What?!” I hear you seasoned Mad Men wannabes with no new episodes to watch hollering at me while trying not to spill your lunch martinis. “Sales and marketing working together to create collateral?! That’s just crazy!”

As melodramatic as that sounds, it is honestly not far from the truth. I have been doing this for a long time and know how difficult it can be to bridge the gap between sales and marketing, especially when it comes to collateral creation projects.

Yet, if you think about it, doesn’t it really make sense for the people creating the collateral and the people who are expected to use the collateral to work together on its creation? Did you just put down your martini as the revelation sets in?

Introduction

Involving the sales team in the creation of collateral gives them a sense of ownership in the content and the creation process itself, increasing the likelihood your collateral will get used. Would you not be more likely to use a piece you had been involved in creating than one you were simply handed and told to use? Plus, there is a wealth of information the sales team can provide marketers that can improve the quality and effectiveness of collateral material.

I know you think of working directly with the sales team and start steeling yourself for a fight, or at the least, a lengthy, drawn out process, but unlike the work of those other stars of the 1960's, the rocket scientists, working with sales to create collateral does not have to be as difficult as it might seem. In this guide, I will provide you with some key insights on learning about your sales team and understanding why it is important to work with them on collateral creation, as well as provide you with some steps to make the process as painless as possible.

Four Easy Steps To Collateral Bliss:

1. **Assess Your Sales Team**
2. **Know Your Collateral**
3. **Meet With The Sales Team**
4. **Repeat Continually**

Assess Your Sales Team

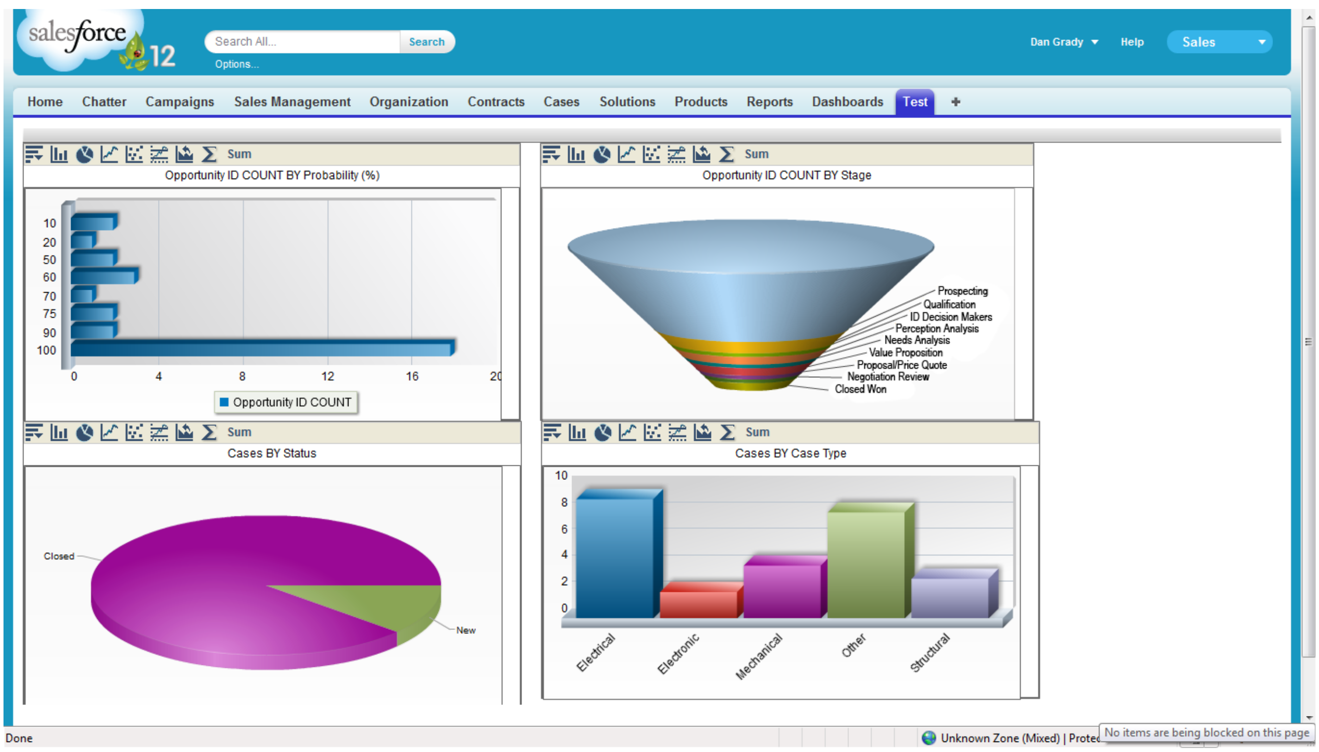
First and foremost, learn a little bit about your sales team. By doing so, you will gain an understanding of their collateral needs. Chances are you are going to find your company's sales team is made up of people with a wide range of experience levels, and therefore, a wide range of collateral needs. There is no one-size-fits-all collateral assessment and while marketing would like to just create some pieces, put them up in a dropbox and move on, I am here to tell you the only way to ensure your collateral gets used is to know your sales team and their needs, then work together with them to create the pieces they actually need, not the pieces you think they need.

There will be at least one member of the sales team who doesn't use collateral at all. Depending on the size of your organization, there may even be multiple reps that don't. It's not because they don't like what you've put together, and it's not because they don't like you or see value in what you do, but the fact is, simply, they don't need any collateral to sell – ever. Short of the prospect asking for a physical sheet to show their boss, this sales person will never use your collateral in their sales process. This is your top seller – your salesperson's salesperson – the one person or group of people who make most of the company's sales, all without using any collateral. That is not to say these folks are not going to be valuable in the creation of sales collateral – in fact, they may be the most important to the process – they are just not going to be using any of it themselves. You must let yourself be OK with this and you must let them continue selling how they sell. Don't get in the way of this freight train. Instead, jump on board with it and embrace it's ability, skills and expertise. We'll delve deeper into working with these top performers a little later.

Assess Your Sales Team

For now, let's look at the rest of the sales team. There are still two more groups you will discover. There will be your mid-level sales people – the ones who are generating good, sustainable numbers, but who are still reliant on the sales tools and leads generated by marketing. And, you will have your newer, more junior sales team members. These are the two groups that are going to be your end customers – the people actually using your sales collateral every day.

The bottom line is that you must know each rep and which of these three groups into which they fit. You must keep in mind that all three types of sales people – the million-dollar rep, the mid-level number grinder and the new kid on the block – should all be a part of your collateral creation process. Each will have a unique purpose and perspective that will be extremely valuable to you.



Know Your Collateral

How well do you know yourself? Pretty well, I bet. But how well do other people know you? Probably not as well as you know yourself, right? The same holds true for your collateral. You might know every word of every piece and have a fantastic running inventory list that links to your dropbox. Your inventory list might even provide multiple scenarios in which each collateral piece can be used. But at the end of the day, if you maintaining that lovely collateral inventory is the only time it's ever visited, your collateral, no matter how good, is ineffective and sadly, not valuable at all.

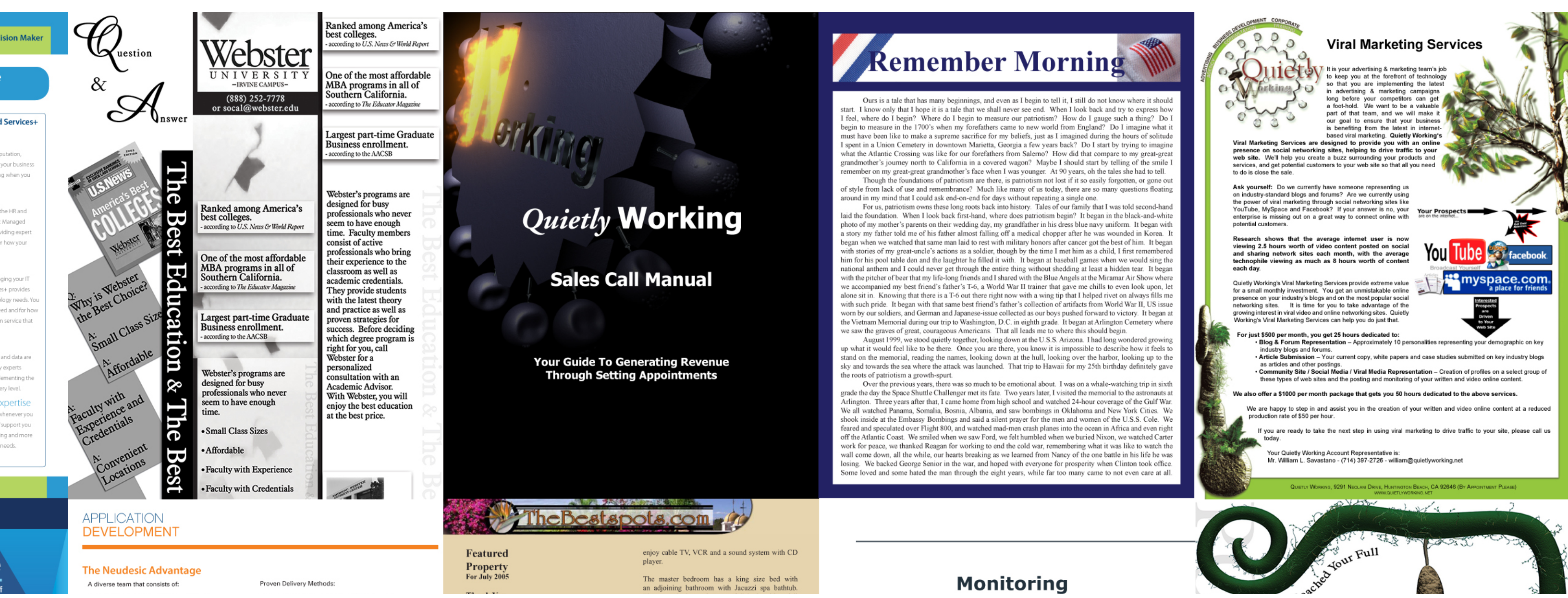
Fortunately, this is easy to change. I'm not saying you don't have a hefty job in front of you, but you may actually find that it doesn't take nearly as much work as you may think to transform your unused, undervalued collateral into the darling of the sales team's efforts. Once you've assessed and know your sales team, all you need to do is take the time to present them with the resources they have at their disposal, work with them to ensure your collateral aligns with their needs and then stay involved with them throughout your marketing efforts.

So, you're next important step here is to ensure that you have a grip on every single piece of collateral and know where it can be accessed. If you are going to engage the sales team in conversations about your collateral, you need to make sure you are prepared to present every piece and know where every piece can be found. You also need to know how each piece fits into your larger collateral strategy and which pieces are designed to work together.

Know Your Collateral

If you're the company's one collateral guru, this step might already be complete for you. But, if you're new to the organization or work for such a large company that multiple team members are continually creating multiple collateral pieces, this step might take considerable time. Either way, when you meet with the sales team, be sure you are completely prepared to answer any question they can throw at you about the collateral you have to offer them.

If you already have a collateral inventory, be sure you know it well. If you don't have a running list of every single piece of collateral, its possible use, and where it can be located, be sure that you have one ready and know it well before you start meeting with the sales team. While your meetings are going to impact your overall collateral strategy as well as your final inventory list, it is important to have an existing collateral inventory list as a starting point.

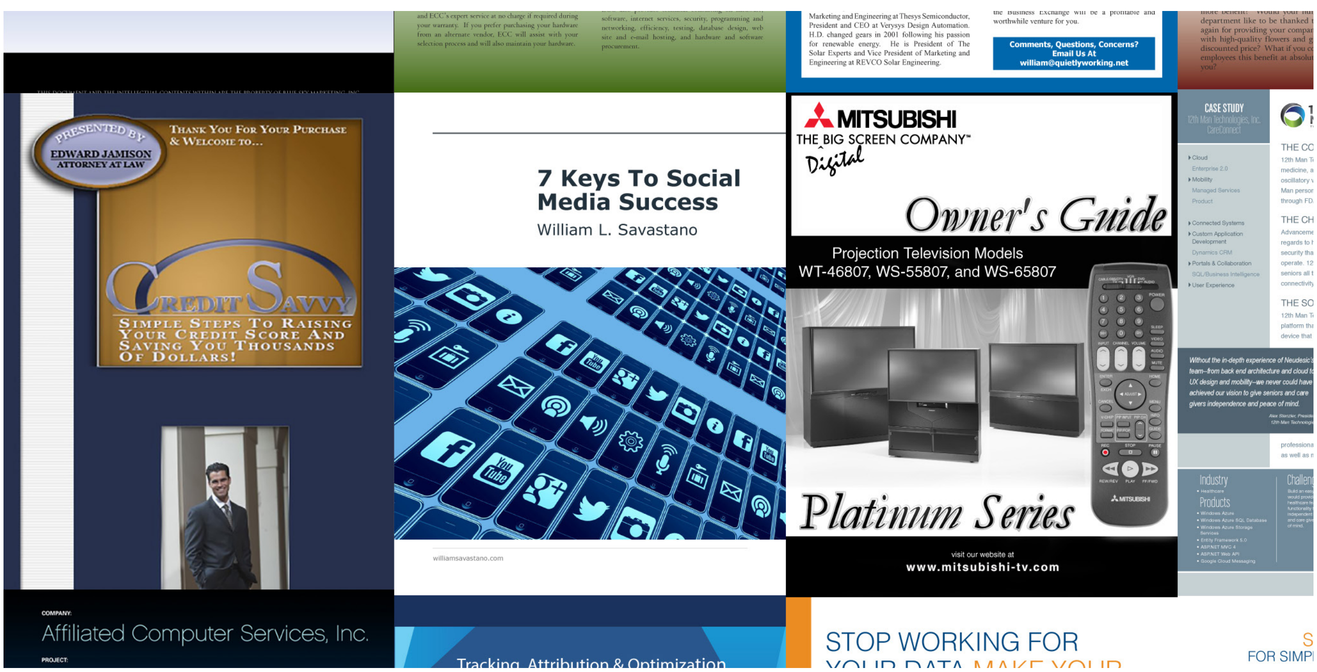


Building Your Collateral Inventory List

You’ll want to start by making a list of all of the different types of collateral your organization already has on hand. Try not to overlook any piece. Obviously, there will be marketing brochures and probably some more in-depth product or service fact sheets, but don’t forget about more obscure pieces that can be used – things like recorded webinars, website videos, blog posts, press releases, case studies and even by-lined articles or editorials that may have appeared on third party sites like LinkedIn or industry trade sites.

You will want to create a spreadsheet or maybe an intranet page that lists out every piece. Use a resource that makes sense for your particular company. Also, be sure to categorize the collateral items in some way, especially if you have a long list of items. These categories should also make sense for your organization. Do not marry yourself to these categories as you may find your idea of what they should be and what is actually practical for the sales team are two different things.

Once you list out all of the collateral, make sure you provide either a link or some type of location information that allows people to easily find each piece of collateral. This could be a link to where it lives on your company website or a shared drive or cloud-based storage location. Links are usually best, but as always, ensure whatever method you implement; it is the most practical for your organization’s sales team members to easily access.



Building Your Collateral Inventory List

Then, finally, be sure to either group the pieces or provide information in a clear and easy-to-follow format that shows how these pieces may be used together. If your reps are going to a retail trade show, you want them to easily see from your collateral inventory list that they should take the company overview brochure, the retail product data sheet and an article your team produced for the CEO on the latest industry trends in retail.

Be sure that no matter what you produce as your inventory list, it is easy to navigate, easy to understand, and most importantly, easy enough to use that it will – you guessed it – actually get used!

Item	Current Revision	Last Reviewed	Next Review	Location
COLLATERAL				
Company Overview Tri-Fold	20130809	20130809	11/2013	.com
Services				
Application & Systems Integration Services Overview	20130809	20130809	11/2013	.com
Application & Systems Integration Services Composition Assessment Offer	20130809	20130809	11/2013	.com
Application & Systems Integration Services CRM Integration Assessment Offer	20130809	20130809	11/2013	.com
Application & Systems Integration Services Hybrid Cloud Assessment Offer	20130828	20130828	11/2013	.com
Application & Systems Integration Services Web Method Assessment Offer	20131011	20131011	01/2014	.com
Application & Systems Integration Services BizTalk Server 2013 Assessment Offer	20131011	20131011	01/2014	.com
Application & Systems Integration Services Enterprise Mobility Assessment Offer	20131011	20131011	01/2014	.com
Application & Systems Integration Services Dynamics Messaging Assessment Offer	20131011	20131011	01/2014	.com
Application & Systems Integration Services Secure B2B Transactions Assessment Offer	20131011	20131011	01/2014	.com
Application Development Services Overview	20131011	20131011	01/2014	.com
Application Development Services 2-Week Assessment Offer	20120302	20131011	01/2014	.com
Business Intelligence Services Overview	20131011	20131011	01/2014	.com
Business Intelligence From Information To Insight Tri-Fold	20131011	20131011	01/2014	.com
Cloud Computing Services Overview	20131011	20131011	01/2014	.com
CRM Services Overview	20131011	20131011	01/2014	.com
Enterprise Collaboration Services Overview	20131011	20131011	01/2014	.com
Enterprise Collaboration Services 2-Week Assessment Offer	20120302	20131011	01/2014	.com
Enterprise Collaboration Collaboration At Every Turn Brochure	20131011	20131011	01/2014	.com
Enterprise Collaboration So Many Ways To Share Tri-Fold	20131011	20131011	01/2014	.com
Enterprise Mobility Servies Overview	20131011	20131011	01/2014	.com
Managed Services for the Business Descinsion Maker	20131011	20131011	01/2014	.com
Managed Services for the Technology Professional	20131011	20131011	01/2014	.com
Additional Services				
Quality Assurance Services Overview	20131011	20131011	01/2014	.com
User Experience Services Overview	20131011	20131011	01/2014	.com
Products				
Empowering the Enterprise With Secure Worfklow Collaboration Tri-Fold	20131011	20131011	01/2014	.com
The Simple Solution to Complex Integration Challenges Tri-Fold	20131011	20131011	01/2014	.com
Solutions				
The Right Data...Right Now Brochure	20131011	20131011	01/2014	.com
Other				
A New Perspective on Enterprise Modernization Tri-Fold	20131011	20131011	01/2014	.com
A New Perspective On Healthcare IT Tri-Fold	20131011	20131011	01/2014	.com

Meet With The Sales Team

Once you've assessed the team, figured out who is who, and know exactly what collateral pieces you have to offer them, it will be time to actually sit down with the reps to learn from them, show them what they have to work with today, and work with them to ensure you are providing the collateral pieces they actually need.

You'll want to meet with your million-dollar reps first – the folks that don't actually use your collateral at all to make those big sales. You want to involve them in assessing the messaging and voice of your collateral. Ask them what works – ask them about the conversations they have with prospects and the features or selling points that land them their biggest deals. Like I said, they will never use your collateral, but your collateral definitely should include the business challenges, the solutions, features and selling points these sales whales use to close their deals. Take the time to meet with these reps – buy them lunch – hell, buy them a drink or two – and be sure you are taking lots of notes. They will give you the insight you need to know the best way to pique the interest of your company's prospects with your collateral.

The mid-level number grinder is who you want to help the most. These are the folks that will be your champion when the executive team decides they want to assess the actual value marketing brings to the organization. Your million-dollar rep will say, "Yeah, I don't use the collateral at all," but the mid-level folks are the ones who will say they couldn't make a sale without your help. That is, provided you actually help them.

Just like with the million-dollar reps, sit down with your mid-level sales folks and find out what resources they need. Find out what resources they wish they had when they are on a sales call or are knee-deep in prospecting. Write out their wish list and then use the messaging and selling points you learned from the top reps to create collateral pieces the rest of the sales team can actually – and will actually – use.

Start off by going over the existing pieces with them and where those pieces can be found. Chances are, no matter how complete and useful your inventory list, or how easy all of your collateral is to find, there are going to be reps who wish they had a piece but don't know it actually already exists, or who are simply not using the collateral because they don't know where to find it. Take the time to show them what's out there, show them where it can be found, and to determine what pieces they need that do not exist yet.

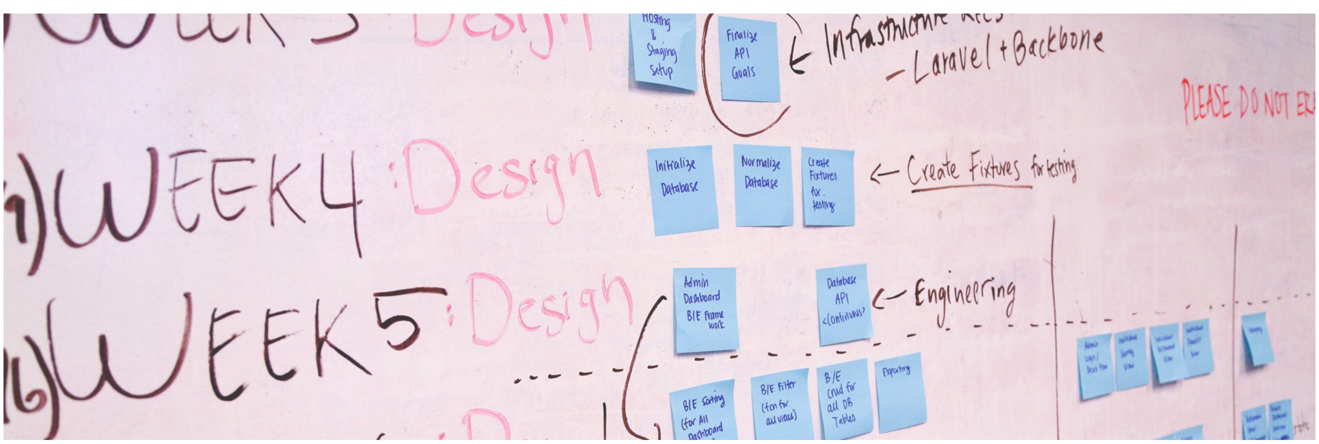
And lastly, sit down with the new kids on the block. They will be able to let you know exactly what someone brand new to the industry or brand new to the company feels they need to succeed. Remember that we are all in this together and helping to shape these newer sales folks can lead to big rewards down the line, especially when they credit the collateral you've provided as one of the resources they use to succeed. Take the time to listen to their needs and find out what you can do to help provide them with resources. Be mindful of the fact that your years of expertise and experience can sometimes keep you from forming a truly clear understanding of not only what these newer sales reps need to learn in order to sell the product, but what a just-as-novice customer may need to read in your collateral in order to buy.

Create A Plan Based On Your Findings

Once you have met with as many sales team members as possible, it is time for you to put the knowledge you've gained to good use. The best place to start is with a plan. At this point, you should have a thorough understanding of the collateral you already have, which of those pieces are actually used by the sales team, and more importantly, which are not. Keep in mind that if the sales team is not using your collateral, it is not out of spite – it is not some personal vendetta – it is simply that the collateral is not useful to them for some reason. It is our job as marketers to gain an understanding of what that reason is, then provide them with collateral that is actually useful.

At this point, the best way to continue the process of providing the sales team with collateral they are actually going to use is to create a plan that has specific timelines for each piece and allows for adequate time to draft, review and revise content multiple times. Often times, a spreadsheet similar to your collateral inventory will be sufficient. If you work in a large organization, you may want to make your plan visible to others to provide transparency into progress and further involve them in the collateral creation process. When building out your plan, be sure to prioritize the pieces you feel can be of the most use to the largest portion of the sales team.

Be sure to list out which team members are involved in the creation of each piece. This will foster ownership and involvement in the process as well as increase the odds the collateral will be used by the sales team once it is complete. Also be sure to involve your million-dollar reps in the review process. Again, while they might not actually be the ones using the pieces, their industry and customer insights are invaluable when it comes to ensuring your collateral is going to speak to prospects and be useful to all of the other reps.



Create A Plan Based On Your Findings

Through meeting with the sales team, you are also going to find that some reps will not see the value in meeting with you or helping out with the collateral creation process. Conversely, you'll find that some are very much onboard with the process and its potential to create real value and increase sales. Embrace the reps that are willing to help. I'm not saying to simply brush aside the ones who aren't, but do take the time to understand who is willing to help and be sure to spend more time working with them.

By involving every rep you can, concentrating your efforts on the ones who are willing to help, building a plan that is visible to the stakeholders in the project, prioritizing the pieces that will have the biggest impact and then following your plan, you will soon be ready to start publishing new and revised collateral that has a great chance of actually getting used by your sales team.

Launching Your New & Revised Collateral

One you have collateral pieces that are ready to be released, you need to make sure you don't make the typical churn-and-burn mistake of simply finishing the piece and moving on to the next one. You want to take the time to release the new piece in a way that gets it noticed, puts it on a path to being used, and most importantly, lets every sales rep and other team member throughout the organization know that it is complete and ready to be used.

To do this, build out a release process that you will follow for each new collateral piece. You want to send the new piece out to all relevant team members within your organization along with an explanation of why it was created and who was involved in its creation. Be sure to send your notifications out to the team using as many different methods as possible - send an email, post it to any internal forums, social platforms or shared resources that you know are used throughout the organization.

You might want to send out your notification more than just once, especially if your organization is large. Try to make sure that the notifications are not coming just from you, but try to get the sales reps that have been receptive to helping your collateral efforts post the new pieces to the internal resources they use as well.

You may also want to establish a regular cadence of re-announcing pieces of collateral at regular intervals. Growing companies are continually adding reps so you can't simply announce a collateral piece once and expect everyone to know about it. You might want to consider re-announcing your most important pieces quarterly. You will need to customize this regimen to your particular organization, but just keep in mind you want to find a balance between keeping people informed of new and existing collateral pieces and NOT inundating them with so many collateral announcements that they start to ignore them.

Get Lots Of Feedback

Be sure that you never release a piece of collateral out into the wild and then fail to check on its progress. You will want to check in with all of your reps and see how the collateral is benefiting them. Refine the collateral as necessary. You will find that some parts of certain pieces are well received while others are not. Some entire pieces, while seeming to be direly needed during the assessment phase, will fall completely flat in the actual implementation stage. The most important thing to keep in mind is that marketers and the materials we create must be dynamic and continually open to change.

Set up a regular review schedule with the sales team as a follow up to your initial meetings and the implementation of new collateral pieces. This will give you a chance to openly assess how your collateral is performing. You will also find that the use of the collateral you have created with the help of the sales team will prompt their need for further pieces. If you've done your assessment correctly, their gears will be turning and you'll start to notice an amazing thing – sales reps coming up to you directly to ask for the resources they need.

If your sales team has a regularly scheduled team meeting, ask the sales leadership for a quick few minutes at all or some of those meetings to present the team with the latest collateral pieces and ask for feedback on existing pieces. This will not only show the sales leadership that you are serious about helping their team succeed, but also help raise the profile of the value marketing brings to the organization – something that if you've worked in marketing for any period of time, you know we always need.

In Conclusion

I hope this guide provides you with a roadmap for getting your sales team to actually use the marketing collateral your team creates. Remember, this is just a guide and it is important for you to adjust the methods I've laid out here to fit the specific needs of your company and its team members. Also remember, no matter how challenging it might be, we as marketers need to take the time to involve the sales team in the collateral creation process. They are not just colleagues, but in fact, should be our internal customers. We should give their needs and their methods just as much consideration when creating sales tools as we do the end customer who is going to make the purchase. Good hunting, my friends.

About

William L. Savastano is a business professional and two time Society for Technical Communication Award Winner with over two decades of experience in the corporate arena. William trained extensively in advertising and marketing copywriting, technical writing, journalism, and both print and electronic publishing. William's body of work includes a large volume of marketing content, collateral materials, websites, operating manuals, technical manuals, as well as inclusion in national publications and a number of published poems and short stories.

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