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# Information management for sales and marketing

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*This article provides an overview of information issues in the sales and marketing domain. It begins by outlining three different domains of information: offering, customer and process. It then discusses the tribes that make up the worlds of sales and marketing and outlines their information needs. It offers an overview of the role of technology in sales and marketing, including customer relationship management systems. It ends with some closing comments on the opportunities for information professionals in the sales and marketing domain.*

## INTRODUCTION

Sales and marketing has a poor reputation among the general public. We encounter many salespeople in the course of our lives and not enough of them are excellent at their jobs. We also encounter the products of bad marketers, for example, advertising as interruption and products with no clear value to the user presented. However, this does not mean that sales and marketing are not valid activities to undertake. At their heart, the goals of good sales and marketing are admirable: to ensure that products and services meet a customer need and that potential customers understand how a product or service can meet their need. We only notice bad sales and marketing because it interrupts and annoys us. Good sales and marketing is rarely noticed and appreciated.

Information plays a critical role in good sales and marketing. Sales and marketing professionals do not always acknowledge this. Many are too busy selling or marketing to reflect on the resources that they draw on or the processes in which they engage. Information professionals do not necessarily have a sales or marketing background and so as outsiders may struggle to articulate the roles that they play in these processes.

This article highlights the role that information plays in sales and marketing and provides an overview of three key areas of information for this domain. It explains to information professionals some of the different archetypes that make up the sales and marketing world and the role that information plays in their lives. The final section discusses the role of information technology in sales and marketing – a role that for the last 20 years has been revolutionary.

## THREE KEY KINDS OF INFORMATION

Obviously sales and marketing involves many different kinds of information. Three key areas can be identified:

- Offering information. Any organisation – for-profit, non-profit or government – has a product or service that it aims to deliver to another group that requires some funding to undertake. That product or service has an information element.
- Customer information. Those customers (or consumers or stakeholders) also have an information element.
- Somehow these offerings and customers have to be introduced to each other in a sensible manner, that is, a process. This process will have information elements.<sup>1</sup>

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All websites viewed January 2014.

<sup>1</sup> De La Rue K and Moore M, "Closing the Deal with the Help of Knowledge" (2008) 11(3) *KM Review* 14.



## Offering information

Many organisations sell a mix of products and services, hence the umbrella term “offering”. Marketing people need collateral about these offerings that can engage customers. Salespeople need to know the benefits of the product to sell it. Typically this information is produced internally. The key concern here is that the appropriate audience for this information has been identified and their concerns addressed. A frequent error is the creation of material for the wrong audience, for example, a technical expert writes about a product from their point of view rather than that of a neophyte customer and so alienates them.

The role of the information professional can be to ensure that the right audience has been identified and selected and that the information has been made available to them in the right way. This content may be distributed internally and also externally through a variety of platforms, for example web, mobile and social media.

The profusion of video, audio and animation alongside traditional print media has led to development of digital asset management systems to manage the creation and distribution of this material. Marketing departments are typically the key stakeholders for these systems and requirements for them often appear in enterprise content management (ECM) projects. Information professionals who work with ECM should understand the needs of these groups as they differ greatly from areas such as records management.

## Customer information

Customer information is built up from a range of internal and external sources. There may be publicly available information such as trade directories or press archives. They may be purchased from a third-party – it is possible to buy lists of “leads” and their contact information (for example, corporate IT buyers). However, much of the most valuable customer information comes from contact with customers. This includes interactions with sales staff but can also include customer contact with other parts of the organisation (for example, customer service).

The challenge for many organisations is in bringing these multiple views of the customer into a single, coherent picture. Several factors have caused this:

- Many organisations were traditionally built around product divisions or have been formed from the merging of companies with different products serving the same customer base. Banks are a classic example of this – divisions responsible for savings accounts, home loans, consumer credit, insurance and wealth management all built separate systems to create their own view of the customer. However, the customer perceives them as being one brand and so expects different parts of the organisation to co-operate with each other as a matter of course. The goal is a “single view of the customer”.
- Salespeople view their customer knowledge as a source of personal competitive advantage. They are reluctant to share it with other colleagues who may use it against them.
- Customers may identify themselves differently to different parts of an organisation. This may be a deliberate strategy of obfuscation but is more likely to be down to convenience.

Information professionals should be supporting a single view of the customer in their work.

## Process information

If offerings are the “what” and customers are the “who” then process information is the “how”. Most sales organisations typically have a sales process or methodology to provide a common framework around their sales activity. Jordan and Vazzana split sales processes into four main types:<sup>2</sup>

- Territory management processes that examine how a sales force is set up to serve a customer base, for example, is each salesperson allotted a city or should a new, growing market receive more sales attention than a mature, existing one?

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<sup>2</sup> Jordan J and Vazzana M, *Cracking the Sales Management Code: The Secrets to Measuring and Managing Sales Performance* (McGraw-Hill, 2011).

- Account management. How should the value from a customer be developed and managed over a particular time period? What level of resourcing will that customer require?
- Opportunity management. How should a sales opportunity be managed from the identification of a lead to the close of a deal?
- Call management. How should individual interactions with customers be best conducted?

Marketing itself will have processes, often oriented around campaigns to launch new products or reposition existing ones. Processes are often partially embedded in customer relationship management (CRM) systems. However, sales and marketing processes are typically incomplete. The tribes that make up sales and marketing develop their own processes that do not necessarily join up. It is time to introduce these tribes.

## SALES AND MARKETING TRIBES

Information professionals need to understand the types of people they will meet in the worlds of sales and marketing. While these groups have an overall objective (to grow the revenue of a firm), that does not mean that they are all the same. The next section talks about the role of different sales and marketing tribes and their information needs.

The biggest split is between sales and marketing. Kotler, Rackham and Krishnaswamy identify two types of tension between sales and marketing: economic and cultural.<sup>3</sup> The economic tension occurs because organisations do not have infinite sums of money to spend on both functions:

- Salespeople typically believe that the best way to increase revenue is to hire more salespeople whereas marketing would prefer to spend it on promotional activities.
- Salespeople typically want to discount on price to close deals which makes marketing unhappy.
- Salespeople want products that meet the need of their particular customer whereas marketing wants products with a more general appeal.
- The financial impact of marketing on a business can be harder to judge than the impact of sales.

Kotler, Rackham and Krishnaswamy state:

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. Marketers, who until recently had more formal education than salespeople, are highly analytical, data oriented, and project focused. They're all about building competitive advantage for the future. They judge their projects' performance with a cold eye, and they're ruthless with a failed initiative. However, that performance focus doesn't always look like action to their colleagues in Sales because it all happens behind a desk rather than out in the field. Salespeople, in contrast, spend their time talking to existing and potential customers. They're skilled relationship builders; they're not only savvy about customers' willingness to buy but also attuned to which product features will fly and which will die. They want to keep moving. They're used to rejection, and it doesn't depress them. They live for closing a sale. It's hardly surprising that these two groups of people find it difficult to work well together.<sup>4</sup>

While this high-level split yields useful insights, some further subgroups can be identified:

- Salesperson. Salespeople live or die by "making their number", that is, meeting their sales targets. All their behaviour tends to be focused around this goal. Salespeople tend to take a tactical approach to information – what do I need to know about this client and about this product for this next sales call?
- Sales Manager. Sales managers oversee teams of salespeople. Typically sales managers have themselves been salespeople before promotion. Depending on the sophistication of the organisation, they may have a greater or lesser level of managerial skill. As information consumers, sales managers are typically more sophisticated than front-line sales staff and this sophistication increases as one goes up the sales organisational hierarchy. Sales managers want information about the activities and successes (or otherwise) of their subordinates.

<sup>3</sup> Kotler P, Rackham N and Krishnaswamy S, "Ending the War Between Sales and Marketing" *Harvard Business Review* (July 2006).

<sup>4</sup> Kotler et al, n 3.



- Pre-sales. Pre-sales or technical sales staff are found where products have a significant level of technical complexity and buyers are technically savvy. Pre-sales staff are typically hungry for internal technical information about the products and external information about competitor products and related industry developments. In return they can bring back useful information about these market trends.
- Bid Manager. Some sales can be completed in a single interaction with the customer. However, high value purchases in the business-to-business environment should be managed as projects by bid managers. The information needs of the bid manager often mix the tactical understanding of the client relationships with a focus on process rigour. Sales win/loss debriefs will often be owned by a bid manager. Hence they are critical knowledge conduits within sales organisations.
- Brand Manager. The cornerstone role in marketing is that of the brand manager. They have ownership of a particular brand within an organisation. Their information needs are heterogeneous – whatever relates to their brand now and in the future is relevant.
- Marketing Analytics. Often wearing the fashionable badge of “big data”, analytics professionals are playing an increasingly critical role in marketing organisations. However, even within marketing there is often a split between analytics and emotional approaches – labelled “head” vs “heart”. Many marketing staff have a focus on the emotional elements of a brand whereas analytics professionals have backgrounds in statistics and engineering. One movement known as “growth hacking” explicitly positions itself as an engineering rather than a marketing discipline. The role for information professionals here can be as a spanner of boundaries. How can analytics professionals present their insights in ways that reach non-analytics decision-makers?
- Market Research. Traditionally, market researchers have provided a critical link between corporate executives and their customers. Market researchers themselves have divided into qualitative (focus groups, interviews, semiotics) and quantitative (surveys, choice modelling, big data). Market researchers (or “insights” as they became known) have been both voracious consumers and producers of information. The challenge for them has been to ensure that this information and insight is taken up by their clients and stakeholders and used to drive action. The management of this information over time is often neglected. It is common for organisations to recommission research projects because they have not kept proper records of the previous attempts.

## SALES AND MARKETING INFORMATION TECHNOLOGY

Technology has impacted sales and marketing activities significantly but proposed technological solutions have not always had the intended outcomes.

New communications technologies are seized on as sales and marketing channels – the telephone being a 20th century example. This has not necessarily been welcomed by customers – the Australian Do Not Call Register now has nine million numbers on it.<sup>5</sup> Email has likewise been invaded by bad sales and marketing. Sadly there is no Do Not Call list for email spam prevention.

The web itself has been more positive as a sales and marketing medium. A company can publish as much information as it likes about its offerings, although this does not mean that this information will be read. It can automate elements of the buying cycle. It can collect data about its customers. However, this gain in reach has to be traded with a loss in control. Disgruntled customers can complain about poor quality products or sloppy service to the world in a few seconds. Many large companies have invested in social media monitoring tools and social media management teams to respond to customer comments.

At the same time as the internet was changing the public face of sales and marketing in the 1990s, CRM systems were trying to change the background. CRM systems themselves emerged out of software that focused on particular tasks:

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<sup>5</sup> Australian Communications and Media Authority, *Registration Period on the Do Not Call Register – Request for Public Comment* (6 December 2013), <http://www.acma.gov.au/Industry/Marketers/Do-not-call-register/How-to-comply-with-the-Do-Not-Call-Register/do-not-call-register-rings-up-nine-million-numbers>.

- Salesforce automation tools attempt to capture information from salespeople about the opportunities they are working on, their wins rates, their sales forecasts etc. There is a tension in the use of these tools because the data is put in by salespeople but primarily consumed by their managers. The challenge the tools face is in adoption. Salespeople typically prefer to be selling than undertaking what they see as record keeping. However, the data in these systems is critical for the effective running of a business.
- Marketing automation tools often began as databases of customer contact details. This contact information forms the basis for marketing campaigns as well as the sales force automation and customer service activities. Customer contact information is valuable but also very difficult to keep current.
- Customer service software managed the process of recording and answering queries that customers might have about offerings. These tools often link to the software used to manage call centres.
- Analytics tools typically take sales data and attempt to generate insight from it – for example, what customer segments do we have and can we use those to identify new products? Analytics tools have become far more sophisticated and prevalent over the years but they continue to suffer from some obvious limitations. Analysis can only be as good as the underlying data and much sales and marketing data (especially if it has been entered by a human being) is of variable quality. Once the analysis is complete, it is only useful if it is acted on. Sales and marketing staff may not have the skills to interpret the outputs of the analytics tools and so the analysis is wasted.

The last decade saw both consolidation and innovation in the CRM sector with the acquisition of Siebel by Oracle and the emergence of salesforce.com as a SAAS (software-as-a-service) solution. Increasingly CRM systems are being integrated into other enterprise systems. These include enterprise resource planning tools that include logistics, manufacturing, finance and HR processes and also ECM systems that hold documents.

The debate that is emerging within organisations focuses on where this information is to be stored – should it be embedded in the process or treated as “content”? While organisations will make medium-term tactical decisions based on convenience, ultimately the answer should be that it should not matter. The world of web services is not one where everything sits in a single, massive database but rather one where different systems form a coherent network. The political metaphor is not that of a single, global government but many states with open borders and clear treaties. This implies that standards at every level will be of immense importance in this world. If your CRM and ECM systems need to work together then they should have aligned metadata structures.

Leading CRM vendors are keen to harness the latest in technology trends. Salesforce.com has latched onto the “internet of things” – that is, the proliferation of devices that are now connected to the internet. Their positioning is that behind each device is a customer; hence, the internet of things is really an “internet of customers”. At present this seems more like marketing hype than a solid business direction; however, if CRM vendors have not fully absorbed the next wave of technological innovation, they have made a solid stab at absorbing the current ones. Salesforce.com offer its flagship sales software as a mobile app modelled on the user experience of the Facebook mobile app. Since the preferred location of most salespeople is outside the corporate office talking to potential customers, this is a sensible development.

The two other big developments in technology also feature in the CRM stack. Most CRM applications contain built-in analytics. Marketing and service applications now acknowledge the impact of social software on the customer experience – face-to-face, telephone and email must share equal billing with Facebook, Twitter and LinkedIn. “Multi-channel” is now a given – the advantage going to those organisations who can integrate these channels in the most seamless and cost-effective manner.

Social software also plays out within organisations with Salesforce offering tools like Chatter, Microsoft purchasing SAAS vendors such as Yammer, Newsgator’s offering evolving to supplement SharePoint, Tibbr offering to connect multiple systems, and Jive offering both employee and customer collaboration environments. In some sectors (but far from all) the trend is to integrate those





conversations happening within an organisation with those happening outside, but the mechanics of this are still playing out. The location of the boundaries are still up for negotiation.

There are many opportunities for information professionals in the midst of this turmoil. If you have user experience skills then these will be invaluable in the design of effective mobile applications. If you have experience in managing online communities then these skills will be valued by marketers.

## CONCLUSION

Sales and marketing will continue to be core activities for organisations. As with so many organisational activities, technology is changing their form in ways that have yet to fully played out. If one conclusion can be made, “information” in its broadest sense will play an ever more critical role in their operation. This presents an opportunity for information professionals in this space. At a basic level, information concerning offerings and customers will need to be managed using a mix of systems – some focused on content, some on processes and some on data analytics. Historically, these types of systems have been separate but in the future they will need to work together so information professionals need to have an understanding of CRM systems and analytics tools to complement that of content management.

However, competitive advantage is gained by using these tools to generate insight and action from sales and marketing professionals on one hand and customers on the other. This requires that information professionals embed themselves in these activities. Some information provision roles have been there for some time – for example, competitor and market intelligence functions. It allows organisations to cross the “knowledge-doing gap”. If an insight into a new customer opportunity cannot be usefully acted on then it is useless. One example of this was an Australian telecommunications company that developed a model to identify when customers were likely to “churn” (switch to another carrier) but was unable to develop marketing materials quickly enough to act on that insight and engage with the customer.

A disruptive opportunity in the marketplace is the provision of information to customers rather than sellers. There are antecedents for this – for example, *CHOICE* magazine in Australia. At the corporate level, it reflects the increasing power of procurement departments. At the consumer level, it may take the form of the vendor relationship management tools advocated by *The Cluetrain Manifesto* author Doc Searls that allows customers to proactively manage their relationships with those who wish to sell to them.

In every transaction, there is an exchange of value between buyers and sellers and there is also an exchange of information. Perhaps the greatest opportunity for information professionals is to make these transactions as rich and meaningful as possible.

