

What it takes to have a successful sales and marketing process

From MQL's to closed deals

The essential guide



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Introduction

A successful sales process is vital for any company's ability to generate revenue, sustain growth, and build long-term customer relationships.



While many businesses may follow a structured process from lead generation to deal closure, the reality is often far more complex. **Misalignments** between teams, **inefficiencies** in transitioning leads through the stages, and a focus on **tactics over strategy** can disrupt even the most well-intentioned sales efforts.

This e-book explores the anatomy of a successful sales process while addressing the common pitfalls and challenges that businesses face. It identifies the key differences between demand generation and lead generation, explaining how each process plays a vital role in creating the right foundation for sales.

From the **initial identification** of target accounts to **closing** a deal, this guide will provide a deeper understanding of how building **trust and relationships** with buyers is central to both **demand and lead generation**.

Only by aligning these efforts and focusing on strategy, rather than just tactics, can organisations truly drive success and sustain long-term growth

1 Demand Generation vs Lead Generation



Demand generation is widely regarded as the first critical step in a successful sales process and is fundamentally different to the lead generation process.

This can be where the process starts to fall apart, not only because of a misunderstanding in terminology, but also due to misalignment between sales and marketing.

While both teams aim to bring in high-quality leads, their objectives often differ.

Here we aim to highlight the key differences.

1.1 Demand Generation: Awareness and Intent

Marketing focuses on generating awareness through broad-based tactics like content marketing, paid ads, social media and events, while sales are more concerned with taking action with leads that are closer to purchasing.

Without a **strong foundation in demand generation**, there won't be enough awareness or interest to even fuel the lead generation process. This can then lead to **knee-jerk reactions** to fill pipelines.

1 Demand Generation vs Lead Generation

Practices to Avoid in Demand Generation

Siloed Goals and Expectations

Marketing might focus on volume metrics such as clicks and downloads, while sales want high-quality, conversion-ready leads. This creates friction between the teams and missed opportunities.

► Focus on Tactics Over Strategy

Marketing and sales can get caught up in executing individual campaigns without a clear overarching strategy, leading to efforts that lack alignment and fail to meet overall company objectives

► Politics and Pet Projects

Marketing and sales initiatives are sometimes influenced by internal politics, pushing initiatives that may not align with actual business goals or the customer's needs.

Practices to Embrace for Effective Demand Generation

► Align Sales and Marketing Goals

Establish shared revenue objectives that relate directly to outcomes, centered around the company's long-term growth, not isolated metrics.

► Balance Volume and Quality

Shift the focus from sheer lead volume to nurturing the right leads and aligning with your Ideal Customer Profile (ICP).

► Continuous Refinement

Regularly revisit strategies to ensure that marketing and sales are aligned with broader company goals, not just tactical ones.

1 Demand Generation vs Lead Generation

1.2 Lead Generation: Turning Demand Into Action

Once demand has been generated, the next step is lead generation. This stage is all about capturing the interest of potential customers and turning them into tangible sales opportunities.



“Lead generation is always less successful without the groundwork laid by demand generation, as leads are more likely to engage with your brand when they already have some level of trust and awareness.”

Practices to Avoid in Lead Generation

► Misalignment of lead qualification across teams

When marketing and sales operate with different definitions of what constitutes a good lead, it leads to miscommunication and inefficiency in converting demand into leads.

► Lead handoff missteps

If marketing doesn't pass on enough context about why a lead is qualified, sales may reject the lead, missing opportunities.

► Too much focus on volume

Chasing quantity over quality can backfire, leaving sales teams frustrated with unqualified leads that waste time and resources.

1 Demand Generation vs Lead Generation

Practices to Avoid in Lead Generation

► Sales Apathy

This happens when they don't trust MQLs and disregard them in favour of their unrelated activity.

Practices to Embrace for Effective Lead Generation

► Implement clear lead scoring models

Establish criteria for what makes a lead qualified, across marketing and sales funnels to ensure alignment between sales and marketing.

► Clear handoff processes

Ensure smooth transitions by providing sales teams with valuable context, such as buyer intent signals, to better qualify leads. Use the data from the entire buyer engagement journey to inform a better sales conversation

► Balance quantity with quality

Shift from quantity-based cold calling following up leads that have demonstrated interest and are aligned with your ICP.

2 Building Relationship and Trust

Both demand and lead generation are only effective if they are built on a foundation of trust and relationship-building. Without establishing trust with potential customers, neither will be successful.



Building relationships involves understanding the needs, pain points, and challenges of your buyers and offering them value before you even ask for anything in return. When demand generation strategies focus on educating and nurturing your audience, and lead generation tactics focus on genuinely qualifying and assisting buyers, the sales process becomes a natural progression rather than a hard sell.

Establishing the foundations

1

Long-Term Relationship Focus

Success doesn't happen overnight. Building trust with your audience is a long-term investment that requires consistent engagement, follow-ups, and a focus on customer needs.

2 Building Relationship and Trust

Establishing the foundations

2

Genuine Engagement

Both demand and lead generation strategies need to prioritise authentic, two-way conversations over one-sided pitches.

3

Customer-Centric Approach

A sales process focused on the customer's needs and challenges is far more likely to build trust and result in long-term success.

Best Practices for Building Trust



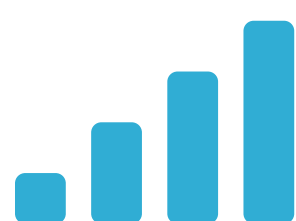
Nurture Leads Over Time

Use content and engagement strategies to educate and build trust with your audience before pushing for a sale.



Personalise Communications

Tailor your approach to the unique needs and pain points of each lead, showing that you understand their challenges and can offer value.



Create Value at Every Stage

Whether through thought leadership in demand generation or providing useful resources in lead generation, always prioritise value delivery to the customer.

3 The Sales Pitch



Sales teams may have a one-size-fits-all approach to pitching, relying heavily on tactical demos and presentations, without considering the larger strategic needs of the customer.

Additionally, internal politics often dictate which products or solutions get prioritised in the sales process, which can lead to a misalignment with what the customer truly needs.

What to Avoid in a Sales Pitch



Lack of Customisation

Too many sales pitches focus on a standard presentation or demo without tailoring the message to the specific needs and pain points of the prospect. This tactical focus on the product rather than the solution doesn't resonate with customers who are seeking a partner to address their business challenges.

Best Practices for Sales Pitching

- Tailor every pitch to the prospect's unique needs and challenges.
- Align sales efforts with customer outcomes rather than internal preferences or politics.
- Provide a solution-oriented approach, focusing on how your offering will solve their problems, not just what features it has.

4 Handling Objections: Persuasion Over Product Fit

Objection handling is often seen as the art of persuasion, but many companies mishandle objections because they are more focused on "winning the deal" than finding a true solution to the prospect's concerns.



Sales teams may rely on high-pressure tactics or scripted responses rather than truly addressing the underlying issues.

What to Avoid in Objection Handling

► Using Tactics Over Genuine Solutions

When sales teams are driven by the desire to close a deal at any cost, they may overlook valid objections or fail to fully address them. This results in short-term wins but long-term dissatisfaction for the customer.

► Objection Overload

Many sales reps, especially in high-pressure environments, are not adequately trained to handle the full range of objections. This lack of training leads to surface-level rebuttals, which may seem effective at the moment but ultimately fail to address the deeper concerns of the prospect.

4 Handling Objections: Persuasion Over Product Fit

What to Avoid in Objection Handling

► Focus on Overcoming Objections Rather Than Aligning Solutions

Rather than using objections as an opportunity to better understand the prospect's needs, sales teams may focus on quickly overcoming objections in a way that ignores the true customer pain points.

Best Practices for Objection Handling



1

Shift from overcoming objections to addressing real concerns and providing value-driven solutions.

2

Train sales teams to recognise and uncover the true reasons and cause for objections.

3

Create a consultative approach to objection handling, where the goal is to create a win-win situation for both parties.

6 Closing the Deal

The final stage, closing the deal, is often where many sales processes break down. Even when everything is set for the deal to close, internal bottlenecks, procurement delays, and customer indecision can prevent finalisation. These delays can create frustration and potentially result in lost deals.

Key Reasons for Deals stalling

► Internal Delays

The closing process is often delayed due to internal inefficiencies, such as delayed approvals, additional decision-makers discovered, or confusion over terms. This can result in the sales team scrambling to get the deal finalised, which can erode trust with the customer.

► Customer-Induced Delays

Prospects may be ready to move forward, but internal politics, budgeting cycles, or timing issues may cause delays. Sales teams must navigate these issues carefully to avoid losing momentum.

► Misaligned Priorities

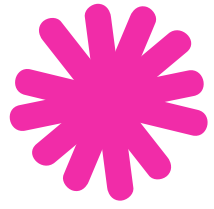
Internal teams (legal, finance, procurement) may not always prioritise the sales team's timeline, leading to extended closing cycles that can hurt the overall sales process.



Best Practices for Closing the Deal

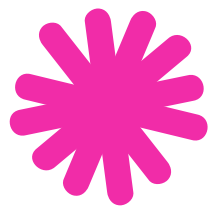
- Work closely with internal teams to streamline the approval and closing processes.
- Set clear expectations with prospects regarding timelines, processes, and next steps.
- Use project management tools to track and manage the final stages of the deal, ensuring that bottlenecks are identified and addressed promptly.

Our Key Take Outs



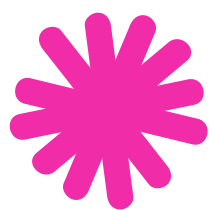
A successful sales process is not just about following a set of steps.

It requires alignment across teams, clear communication, and a focus on the customer's needs. When demand generation and lead generation work hand-in-hand, driven by a genuine focus on building trust and relationships, they become powerful drivers of business success.



Optimising each stage of the sales lifecycle requires an ongoing commitment

From refining the process, to eliminating bottlenecks, and ensuring that the focus remains on delivering value to the customer.



By aligning demand generation and lead generation efforts and focusing everything around trust and relationship-building

Sales teams not only close more deals but also cultivate loyal, long-term customers.



Smart Marketing drives Smart Selling

Where are you missing out?

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