

Overview of Sales and Marketing

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(A concise, easy-to-read guide for students, new hires, or anyone looking for a quick refresher)

1. Core Definitions

Term	What It Means	Primary Goal
Marketing	The strategic process of identifying, anticipating, and satisfying customer needs profitably. It covers market research, product development, pricing, promotion, distribution, and brand management.	Build awareness, generate demand, and shape perception of a brand or product.
Sales	The tactical activity of converting qualified prospects into paying customers through personal interaction, negotiation, and closing.	Deliver revenue by closing deals and maintaining customer relationships.

Key Insight: Marketing creates the pipeline; sales moves prospects through the pipeline to the finish line.

2. The Marketing Funnel (A to Z)

Awareness ? Interest ? Consideration ? Intent ? Evaluation ? Purchase ? Loyalty ? Advocacy

Funnel Stage	Marketing Role	Sales Role
Awareness	Content, SEO, ads, PR, social media	N/A (initial contact)
Interest	Lead magnets, email nurturing, webinars	Qualify inbound leads
Consideration	Case studies, comparison guides, demos	Provide detailed product info
Intent	Targeted offers, retargeting ads	Personal outreach, needs analysis
Evaluation	Free trials, ROI calculators	Negotiation, objection handling
Purchase	Checkout optimization, onboarding	Close the deal, contract signing
Loyalty	Loyalty programs, customer success content	Upsell/cross-sell, account management

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Funnel Stage	Marketing Role	Sales Role
Advocacy	Referral programs, user-generated content	Encourage testimonials, referrals

3. Key Marketing Disciplines

Discipline	Main Activities	Typical Metrics
Market Research	Surveys, focus groups, competitive analysis	Market size, share, customer personas
Product/Brand Management	Positioning, packaging, lifecycle planning	Brand equity, NPS, product adoption
Pricing Strategy	Cost-plus, value-based, dynamic pricing	Gross margin, price elasticity
Promotion (Communications)	Advertising, content marketing, PR, social media	Reach, impressions, CTR, engagement
Distribution (Place)	Channel selection, logistics, e-commerce	Channel sales, fulfillment cost
Digital Marketing	SEO, SEM, email, retargeting, analytics	CAC, CPL, conversion rate, ROAS
CRM & Automation	Lead scoring, nurturing workflows, data hygiene	Lead velocity, pipeline value

4. Sales Methodologies

Methodology	When It Shines	Core Steps
Solution Selling	Complex, problem-solving products	Diagnose ? Propose solution ? Demonstrate ROI
Consultative Selling	High-touch B2B services	Ask ? Listen ? Advise ? Co-create
SPIN (Situation?Problem?Implication?Need?Payoff)	Long sales cycles	Situation ? Problem ? Implication ? Need?Payoff
Challenger Sale	Competitive markets	Teach ? Tailor ? Take control

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Methodology

When It Shines

Core Steps

Inbound Sales

Leads generated by
marketing

Respond quickly ? Qualify ?
Nurture ? Close

Account?Based Selling (ABS)

Enterprise accounts

Identify ? Personalize ? Align with
multiple stakeholders

5. Alignment: Sales ?? Marketing (Smarketing)

1. Shared Goals