# Supporting a Software Sales and Retention Pipeline:
## Opportunities and Challenges

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**Whether your content supports marketing, technical publication, or other purposes, it's essential to write with one voice that communicates a successful brand to your users.**

In many ways marketing and technical publications (tech pubs) teams are closely related. Both teams compose text and graphics to communicate about products. Both teams may develop video content to support their goals. Both teams may use personas to contemplate the needs of their audiences. It may seem the similarities end there. Marketing's budget is typically more flush than that of a tech pubs team. Marketing works more closely with sales, while tech pubs works more closely with development. Marketing's goal is to support product sales, and tech pub's goal is to help users solve problems and continue using the product.

What if marketing focused a bit more on retaining existing customers? And what if tech pubs focused a bit more on attracting new customers? That's what we do at our company.

We work for a software company that develops solutions within the eyecare industry. Eyecare is an unusual space because it rests at the intersections of healthcare, retail, and fashion, which means our customers approach our products—and our content—with a variety of goals, prior experiences, and needs. To complicate the situation further, our products are used by small businesses and large enterprises, each with dynamic needs in a continuously shifting regulatory environment.

Although marketing and tech pubs are now part of separate organizational units, our tech pubs team has reported through marketing at various points in the company's history. Suffice to say, we have a close, collaborative relationship with each other.

This article outlines the various ways our marketing and tech pubs teams work hand in glove to support our sales and retention pipeline in a niche B2B software space.

## Arming Sales with Training Videos

Recently, our tech pubs team conducted stakeholder interviews with teams throughout the company, including sales and marketing. Through these interviews we learned a lot about how our internal users experience technical content and why they seek technical content to begin with.

Although the sales team sees our training videos primarily as a retention tool, they do send videos to potential customers who are too shy to commit to a one-on-one demo. This enables the potential buyer to see how the software works without feeling like they're going to be pressured by a sales pitch. And since customers are busy people, the short training videos are just the right length to engage their attention. The sales team doesn't mind sharing the videos because they create interest in the potential customer and provide a platform for follow-up questions.

Knowing that potential users are an audience for our training videos, we keep them in mind as we decide how detailed we need to make new videos. We're also creating playlists for sales that include overview videos that would be appropriate for our soon-to-be users.

## Leveraging Technical Changes to Engage Customers

The marketing team is continuously engaging our customers through social media, email, and in-product messaging. Sometimes, the messages are promotional, but very often they are informational. These informational messages may relate to such hot seasonal subjects as running year-end reports, breaking down upcoming regulatory changes, and getting ready for back-to-school season.

While the call to action within a promotional email might take readers to a blog post or web form, these informational communications usually take readers to a help topic or training video in which the reader can learn more about the subject. This helps foster trust between our company and existing users by showing them we are a dependable source of information and can anticipate their needs. At its most developed, this sense of trust evolves into brand loyalty.

## Making the Technical Content Social Friendly

The tech pubs team wants to encourage marketing to continue to drive users to our technical content. One of

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When marketing informs tech pubs that they want to share a piece of content, the tech pubs team adds "Open Graph" information to the target help topic. Open Graph is a protocol that takes an ordinary URL and turns it into an eye-catching post when it is shared on such social media platforms as LinkedIn, Facebook, and X. Open Graph enables us to specify a large image, custom page title, and descriptive preview text, all of which are more engaging than the content the social media platforms pull from the page on their own.

Due to the nature of Open Graph, this metadata must be added to each help topic individually, so we have to be judicious about which topics we enhance with Open Graph. Tech pubs works with marketing to understand which topics will be featured in the coming weeks so we can be prepared to support marketing's efforts.
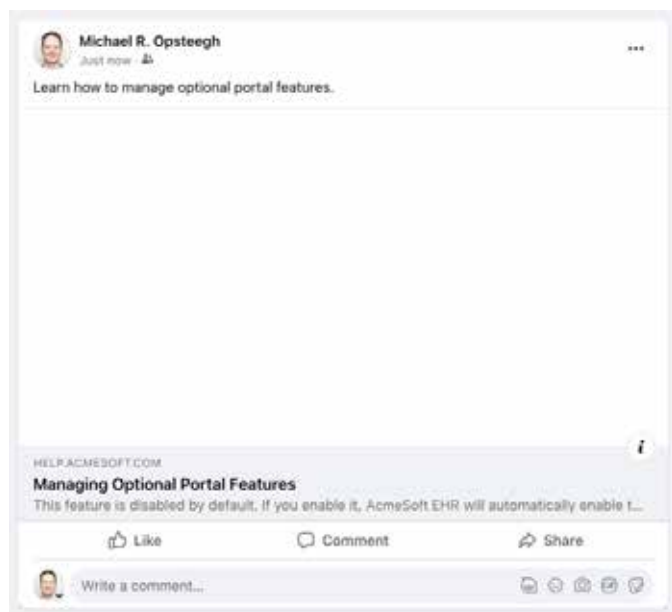


*Figure 1 A Facebook post that references a help topic without Open Graph metadata. Notice the empty space where an image should be and the bland, unappealing text pulled directly from the page.*



*Figure 2 A Facebook post that references a help topic with Open Graph metadata. Notice the large image that doesn't actually appear within the help topic, and the more descriptive title and preview text.*

By supporting the brand identity, the tech pubs team makes it easier for marketing to share technical content.

## Sharing Knowledge Internally

The marketing and tech pubs teams have naturally developed a symbiotic relationship. While members of our teams tend to have similar backgrounds (e.g., bachelor's or master's degrees in English, journalism or communication) our professional emphases have naturally led us to become experts in different areas that complement each other.

Marketing interacts with various groups across the enterprise and has a well-developed sense of the company's goals and directions. Marketing's broad, big-picture view of competing priorities across the company provides knowledge that the tech pubs team can tap into. For example, if a conversation between marketing, sales, and operations uncovers a missed revenue opportunity within a software feature, it's helpful for the tech pubs team to know about it. From there, tech pubs can develop documentation that supports market-ing's promotion of the feature, which ultimately informs customers, drives sales, and upholds business objectives.

Meanwhile, the tech pubs team works closely with the software developers and product owners to develop a deep understanding of the functionality and technology. The tech pubs team has developed a subject-matter expertise that marketing can leverage. To ensure knowledge circulates between the teams and to give members the opportunity to see what the other team is working on, we hold biweekly knowledge management meetings. These meetings are a forum for talking through communication challenges, raising urgent or emergent issues, and exploring opportunities to collaborate further.

## Creating a Feedback Loop

Both the marketing and the tech pubs teams have established review cycles for their content. Marketing includes tech pubs, not only to keep tech pubs in the loop, but also to rely on their subject matter expertise. The tech pubs team includes marketing in reviews for visibility, but also to tap into marketing's talent for developing benefit statements for new features and making connections with initiatives across far-flung groups within the company.

## Writing with One Voice

Though marketing and tech pubs teams may at times prioritize different business goals and hold nuanced perspectives, we are always united on at least one front beyond supporting the enterprise: supporting the audience as a knowledgeable but approachable resource. This is the end goal of any piece of communication we send out, whether it's a customer-facing Facebook post or an internal training video.

As to be expected, marketing sometimes speaks to customers and prospects with a more promotional voice, while tech pubs prioritizes clarity and concision. Different scenarios call for slight variations in tone. But at the end of the day, we want our customers to trust what we have to say, come to us with questions, and continue to build on the relationship both teams work so diligently to create with them.

This can demand a cross in each team's typical approach or perspective. Sometimes, a piece of

marketing communications might call for writing that stresses technical clarity over creativity. Other times, a piece of documentation may call for a friendlier tone than one might expect in technical writing. This effort is worthwhile, as it supports our brand's voice, of course, but also forges deeper connections—not only with our audiences, but within our own company.

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## Conclusion

These are just some of the ways our teams work in tandem to support customer retention and acquisition. In fact, we work so closely together that sometimes our internal users misdirect requests for marketing materials to tech pubs and requests for technical information to marketing. We take this as a good sign that we're working well together. ∎

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