FIRE & SECURITY MARKETING

CIRCLE

CLIENT CASE STUDY

CONNECTING SALES AND MARKETING TO CREATE A SMARTER CUSTOMER JOURNEY



THE CHALLENGE: MAKING EVERY CUSTOMER INTERACTION COUNT

For many B2B businesses, the challenge isn't simply generating more leads. It's making sure every opportunity is managed effectively, from the first enquiry through to conversion and beyond.

Circle wanted to explore how its existing sales processes could be better supported by marketing, identifying opportunities to improve customer communications, reduce manual administration and ensure potential sales opportunities weren't being overlooked.

The aim was to create a more connected approach where sales and marketing worked together throughout the customer journey, rather than operating as separate activities.



OUR APPROACH: REVIEWING THE ENTIRE SALES FUNNEL

We started by reviewing Circle's sales funnel from beginning to end, looking at how prospects moved through each stage and identifying where marketing could add value.

Rather than focusing purely on lead generation, we examined the full experience from the customer's perspective.

Where were there gaps in communication?

Which activities relied on manual follow-up?

Were there opportunities to engage customers at important moments in their buying journey?

And how could the business better recognise signals that someone might be ready for a sales conversation?

This review helped identify opportunities to introduce automation, improve consistency and give the sales team greater visibility of customer activity.

THE SOLUTION: USING MARKETING AUTOMATION TO SUPPORT SALES

Automated customer touchpoints

We identified opportunities to introduce automated communications at key stages of the sales funnel.

These touchpoints were designed to provide relevant information, maintain engagement and create a more consistent customer experience.

The focus was on using automation to complement personal relationships, not replace them.

Sales follow-up reminders

We developed automated reminders linked to stages of the sales process, helping the team keep track of important follow-up activities.

This created a more structured approach to managing opportunities and reduced reliance on individuals remembering when to reconnect with prospects.

Identifying buying signals and triggers

We explored how customer behaviours, including website visits and other digital interactions, could be used as indicators of potential interest.
By identifying relevant triggers, we could create automation opportunities that responded to customer activity.

Flagging opportunities to the sales team

Alongside customer-facing communications, we identified ways to use those behavioural signals to alert the sales team when a prospect demonstrated potential interest.

The aim was to help salespeople prioritise their conversations and engage with prospects at more relevant moments.

Bringing sales and marketing together

Crucially, the process wasn't simply about introducing technology.

It was about understanding what the sales team needed, where marketing could provide support and how both functions could contribute to a better customer journey.

THE OUTCOME: A MORE CONNECTED APPROACH TO SALES AND MARKETING

The project established a clearer framework for using marketing automation to support Circle's sales process.

By reviewing the full funnel, we identified opportunities to:

- Improve the consistency of customer communications.
- Introduce timely, relevant automated touchpoints.
- Support salespeople with structured follow-up reminders.
- Recognise potential buying signals through digital interactions.
- Highlight opportunities for proactive sales engagement.
- Reduce gaps between marketing activity and sales follow-up.

The work demonstrated how marketing can play a valuable role beyond generating initial enquiries, supporting customer engagement and sales activity throughout the buying journey.

THE BIGGER PICTURE: MARKETING SHOULDN'T STOP WHEN A LEAD REACHES SALES

This project reflects a challenge we see across many B2B businesses.

Marketing generates interest, but once an enquiry reaches the sales team, marketing's involvement often stops.

Yet there are so many opportunities for marketing to add value throughout the sales process.

From helpful follow-up content and automated reminders to recognising customer engagement and highlighting potential opportunities, a connected approach can make the whole experience more effective.

And importantly, automation doesn't have to make customer relationships less personal.

Used thoughtfully, it can help businesses deliver more relevant communications while giving salespeople more time to focus on meaningful conversations.

Because successful sales and marketing alignment isn't about generating more activity. It's about making every interaction count.

ABOUT F&S MARKETING

F&S Marketing helps B2B businesses connect marketing with sales, creating practical strategies that support customer engagement, improve sales processes and generate meaningful commercial opportunities.

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Sales starts the conversation. Follow-up turns opportunity into business.