

Sales & Marketing Alignment Checklist

Shared Goals & KPIs

- Agree on revenue, pipeline, and lead targets together.
- Create joint scorecards, not separate ones.

Unified CRM & Dashboards

- One system, one version of the truth.
- Make sales and marketing data visible across teams.

Lead Definition & Handoff

- Define exactly what a marketing-qualified lead (MQL) and sales-qualified lead (SQL) look like.
- Document the process for smooth handoffs.

Content Aligned to Sales Cycle

- Build collateral (case studies, spec sheets, ROI calculators) to support each stage of the sales journey.
- Arm sales with assets that address buyer objections.

Regular Alignment Meetings

- Weekly or bi-weekly syncs to share updates on campaigns, pipeline health, and customer feedback.
- Keep meetings short, focused, and actionable.

Feedback Loops

- Sales shares real-world objections, competitor intel, and success stories.
- Marketing uses this to sharpen messaging and campaigns.

Cross-Training

- Marketing learns the sales playbook and customer conversations.
- Sales gains insight into buyer personas and marketing campaigns.