THE SALES AND MARKETING ALIGNMENT CHECKLIST

Are your Sales and Marketing teams working to the same agenda? If not, chances are you're not achieving optimum sales velocity and therefore revenue is slipping through the cracks in your pipeline.

Learn how to improve the efficiency and effectiveness your sales cycle through Sales and Marketing harmony starting with our quick fire checklist.

Set clear responsibilities

Ensure Sales and Marketing know their tasks and responsibilities for a smooth hand-off of leads, encouraging accountability.

Regular meetings

Make sure expectations are being fulfilled and the two teams are not working in silos – this helps everyone stay on track and connected

Communicate content marketing

It's important to keep Sales updated with any new marketing content or promotions that leads are receiving, helping conversations remain professional and accurate

Content creation

Sales people learn a lot from prospects on a daily basis, so develop an easy way they can feedback key areas of interest or pain points to help Marketing create content that resonates.

Learn from one another

Share reports and analysis with the other team to gauge performance of key activities, areas for improvement and strategic takeaways

Shadow sales

For marketing to really understand what happens on sales calls, allow time to shadow calls to appreciate how sales work and the challenges they face

Establish a location for sales enablement resources

Include all marketing assets in one, easy to access location so that sales can utilize company guides, presentations, promotional information and so on

Encourage teamwork

Get to know one another by arranging Sales and Marketing team lunches, workshops or after work drinks – the more the teams know one another as people, the more likely they are to work closely together.

For more actionable tips on sales and marketing alignment check out: B2B Sales and Marketing: The Ultimate Power Couple.



You can also delve into the best strategies B2B marketers can deploy to accelerate the sales process in our latest guide.

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