

Sales & Marketing Alignment Checklist

For Mid-Size B2B Teams

Why this checklist?

Most mid-size teams are already doing marketing — but sales and marketing rarely agree on what 'good' looks like. This checklist helps you find exactly where the gaps are so you can close them before they cost you revenue.

1. Shared Ideal Customer Profile (ICP)

- ICP is defined and documented**
Both teams can point to the same written profile, not just a general idea
- ICP includes key details**
Industry, company size, painpoints, budget range, and decision-maker roles
- Marketing and sales both helped build it**
It wasn't created in a silo. It reflects input from both teams.
- ICP is reviewed at least quarterly**
Your ideal customer evolves. So should this.

2. Agreed-Upon Lead Scoring

- Lead scoring criteria are defined**
There's a clear system for what makes a lead worth pursuing.
- Both teams agreed on the scoring model**
Sales didn't inherit marketing's criteria. They helped create them.
- Scoring reflects revenue potential, not just activity**
A lead who downloaded a PDF isn't the same as one who's actively evaluating.
- Handoff criteria are clear**
Everyone knows exactly when a lead moves from marketing to sales. No gray area.

3. Single View of Pipeline

- Both teams use the same CRM or tool**
No one is tracking pipeline in a spreadsheet that no one else sees.
- Pipeline stages are clearly defined**
Both teams agree on what each stage means and what moves a lead forward.
- There's one source of truth for pipeline data**
Not marketing version and sales version. Just one shared view.
- Both teams can see where leads are stalling**
Do-off points are visible, not buried in a report no one reads.

4. Regular Check-Ins

- Check-ins happen at least bi-weekly**
Not annual reviews. Not when something breaks. Ongoing. Short. Focused.
- Check-ins are tied to real data**
Conversations are based on pipeline and conversion numbers instead of assumptions.
- Action items come out of every meeting**
Something changes after every conversation. No meetings just to meet.
- Both teams leave with the same priorities**
No one walks out confused about what matters most right now.

5. Aligned Messaging & Offers

- Marketing and sales use the same language**
The way you talk about your product in marketing copy matches what sales says on calls.
- Offers match what the ICP actually wants**
You're not running promotions that attract the wrong kind of lead.
- Messaging is updated when ICP or market shifts**
what worked 6 months ago gets revisited instead of left on autopilot.
- Sales has input on what marketing puts in front of prospects**
No surprises when a lead gets on a call.

6. Clear Ownership & Accountability

- Someone owns the alignment process**
It's not everyone's job. That means it's no one's job. One person leads it.
- Roles and responsibilities are documented**
Who generates leads. Who qualifies them. No guessing.
- Success is measured by shared metrics**
Not just leads or closes. Pipeline velocity, conversion rate and revenue.

Score Your Alignment

Count how many boxes you checked. If it's under 18 out of 24, you have clear gaps. Now you know exactly where they are. Start with the sections that scored lowest. That's where alignment will move the needle fastest.

Ready to close the gaps? This checklist is the starting point. If you want help turning it into a plan or if you're not sure where to begin, let's talk.