



SALES & MARKETING ALIGNMENT CHECKLIST

Used by Clickmode with corporate clients to bridge the strategy gap between sales and marketing



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Shared Definitions

- Do sales and marketing agree on what a qualified lead looks like?
- Are terms like “MQL” and “SQL” defined, documented, and understood by both teams?

Joint Planning

- Are sales and marketing involved in campaign planning from the start?
- Are campaign goals mapped to specific sales outcomes (not just reach or impressions)?

Unified Metrics

- Are KPIs shared across teams (e.g lead-to-close rate, sales cycle length, revenue per lead)?
- Does marketing track performance beyond engagement - such as contribution to pipeline?

Feedback Loop

- Is there a system for sales to give feedback on lead quality regularly (weekly/monthly)?
- Does marketing adjust messaging or targeting based on sales input?

Technology Alignment

- Are both teams using a shared CRM or data dashboard to track lead progress?
- Is there visibility into the full customer journey - from ad to closed deal?

Leadership Accountability

- Do marketing and sales leaders meet regularly (not just when there's a problem)?
- Is there a shared revenue target or scorecard both teams are held accountable to?

Score:

- 10 - 12 Boxes ticked: You're aligned and ready to scale
- 7 - 9 Boxes ticked: You've made progress, but gaps are holding you back
- 0 - 6 Boxes ticked: Misalignment is likely costing you revenue, fast!

We help businesses build strategic marketing foundations that support revenue growth.

Reach out to us to book a free consultation!



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