Category

Commercial Excellence

Marketing-Sales Alignment & Joint Planning Playbook

Getting marketing and sales to agree on what a qualified lead actually is, before arguing about lead volume

- Practitioner
- Intermediate
- Template Included

- Administrator
- 05 February 2023
- 3 minute(s)

Overview

A framework for marketing-sales alignment and joint planning — establishing shared lead qualification definitions, joint pipeline planning, and mutual accountability — addressing the persistent friction between marketing and sales that most commonly traces back to disagreement about basic definitions rather than genuine strategic misalignment.

Why does marketing-sales friction persist even in organizations

that hold regular joint meetings? Regular meetings without resolving fundamental definitional disagreements — what actually constitutes a qualified lead, for instance — often just provide a recurring venue for the same underlying disagreement to resurface, without

addressing its root cause.

What's the single most valuable step for resolving marketing-sales

friction? Establishing a genuinely shared, specific lead qualification definition that both teams agree on and use consistently — this single step resolves a disproportionate share of common marketing-sales friction, which frequently traces back to each team using a different implicit definition.

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