

# Table of Contents

Exercise #1: Setting the Baseline with Reflection Prompts

Exercise #2: Reframe Your Assumptions

Exercise #3: Map Your Lead Journey

Exercise #4: Rituals for Ongoing Alignment

Exercise #5: The Culture Pledge

## Exercise #1: Setting the Baseline with Reflection Prompts

**When did you last collaborate directly with sales/marketing?**

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**How is your team bridging the gap between Sales and Marketing?**

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**How strong would you describe the partnership?**

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**Does each team understand each other's role and how changes are made to both targeting and the sales process?**

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**Do you feel like you are one team with one common goal?**

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## Scorecard

Category	Your Score (1-5)	Notes
<p><b>Understanding Our Shared Goals</b></p> <p><i>How well is each team aligned on a shared goal, KPI, or purpose? Can your team articulate this overarching goal? Do you have meetings to track these goals together?</i></p>		
<p><b>Feedback Loop &amp; Process</b></p> <p><i>Are your teams comfortable giving and receiving feedback from each other? Do you have a formal feedback loop or process outlined? Do you take action and track improvements from this feedback?</i></p>		
<p><b>Lead Qualification</b></p> <p><i>Do your teams understand how leads are being qualified and what the ICP is? Do they understand the levers and filters that can be implemented to qualify leads? Is there an owner for the lead qualification process and feedback? Is there reporting to show qualified leads and converted leads?</i></p>		
<p><b>Lead Conversion</b></p> <p><i>Is your team reporting out on lead conversion and changes over time? Are sales leaders reviewing this by rep and using it to coach them? Is that data being passed back to marketing to help them further refine targeting? Are you taking actions for trends you see in lead conversion and analyzing them regularly?</i></p>		

<p><b>Targeted Content</b></p> <p><i>Do you have a shared content calendar and the ability to see current and future ads? Does the team have the ability to provide feedback on content, and are you tracking CTR and conversion rates per campaign? Can you make changes to content quickly if it is not converting or a new image or ad needs to be placed? Are you aligning with seasonal events, industry trends, and consumer behavior?</i></p>		
<p><b>Sales Process</b></p> <p><i>Do both teams have a good understanding of all the steps that go into the sales process from initial call to close? Are you tracking lead progress and where in the sales process leads are getting stuck or closing as lost? Are you using sales process reporting to coach your team or have shared KPIs around win rates, revenue, and time to close?</i></p>		

**Total Score:** \_\_\_\_\_ / 30

**Your Maturity Stage**

- **5-10 points:** Siloed Survivors
- **11-17 points:** Collaborative Climbers
- **18-25 points:** Aligned Accelerators
- **26-30 points:** Revenue Powerhouse

**Action Planning**

**Which category scored lowest?**

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**Which category scored highest?** \_\_\_\_\_

**What's one behavior from the next maturity stage you can adopt immediately?**

\_\_\_\_\_

## Three Goals to Improve Your Lowest Scoring Areas

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Retake this audit in 6 months to measure your progress.**

Use the second audit as your checkpoint: what improved, what stayed flat, and where do you still feel friction in the day-to-day work between teams? Let the changes in your scores guide your next round of fixes.

## Exercise #2: Reframe Your Assumptions

Assumption	Reframe

### Common Examples to Consider

Assumption	Reframe
<i>Marketing is sending horrible leads.</i>	<i>We need to provide Marketing with feedback that the leads we are seeing are under our average age and income level, so they can adjust targeting.</i>
<i>Sales is dropping the ball. We are sending a ton of leads that they are not converting.</i>	<i>Let's look at the reports on the sales process to see where these leads are dropping off. Are they not being called in a timely manner, or are all leads not moving past the qualification stage?</i>
<i>We are wasting a ton of money on social ads that are not converting.</i>	<i>Can we look at the marketing reports together to understand how social traffic converts and how it may influence organic conversions?</i>
<i>Our Sales process is broken, we can't convert any leads, and we need to hire new salespeople who can convert any lead.</i>	<i>Let's look at the sales conversion reporting to see which reps are performing well and their process and pitch. If we are seeing low conversion rates across the board, let's dive into the qualification numbers to see if the volume of leads nets out to qualified leads.</i>

<p><i>We only perform well in highly populated areas and geos, which is why we are going to invest all our marketing efforts in these areas.</i></p>	<p><i>Let's look at our current customer records as well as conversion rates across the country to see if there are some untapped secondary markets. This could be a more profitable area for us to target with less competition and strong potential leads.</i></p>
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### Try This Prompt

Identify and rewrite one assumption from your own meetings using this chart. What did you learn when you shifted it from a complaint into a concrete, shared action?

<b>Assumption</b>	<b>Reframe</b>



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**Identify Action Items**

List three to five pain points you can change and test, with regular weekly meetings between leadership on progress and improvement. Sales Operations and Analytics should be present to ensure you're measuring tests correctly and have the reporting you need.

**Example pain point:** We're attracting a lot of leads from Instagram, but the demographic is too young and lower income than our target audience, resulting in fewer conversions.

**Action:** Marketing adjusts demographic targeting on social media to test a lower volume of more targeted leads for 30 days.

**Your Action Items**

**Pain Point:**

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- **Action:**  
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- **Owner:** \_\_\_\_\_
- **Timeline:** \_\_\_\_\_

**Pain Point:**

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- **Action:**  
 -----  
 ----
- **Owner:** \_\_\_\_\_
- **Timeline:** \_\_\_\_\_

**Pain Point:**

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- **Action:**

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- **Owner:** \_\_\_\_\_

- **Timeline:** \_\_\_\_\_

After your test timeline ends, regroup as a team. Review the data together. Did lead quality improve? Did the conversion move? Did time-to-close shorten? Then, decide whether to:

- **Scale** the change (if it worked)
- **Tweak and retest** (if results were mixed)
- **Retire** the idea and move on

Then choose the next set of one to two bottlenecks to tackle. The power of shared lead mapping comes from repeating this cycle, not treating it as a one-time workshop.

# Exercise #4: Rituals for Ongoing Alignment

## Additional Rituals (Choose at least one)

- Monthly Revenue Roundtable**
  - Cross-functional review of revenue drivers and blockers
  - Celebrate wins and analyze losses together
- Role Swap/Shadow Days**
  - Members of Sales, Marketing, and Sales Ops switch roles or shadow someone for a full day
  - Include kickoff breakfast, lunch recap, and end-of-day reflection with shared learnings
  - **Our date:** \_\_\_\_\_
- Shared Customer Success Stories**
  - Build a library of best customer stories for marketing and sales enablement
  - Create content in multiple formats: written, visual, and video
  - **Goal:** \_\_\_\_\_ case studies per quarter/year
- Shared Slack Channel**
  - Real-time collaboration and win sharing
  - Quick feedback loops on campaigns and leads
- Win Story Library**
  - Document and share successful conversions
  - Identify patterns in what's working
- Quarterly Strategic Planning Session**
  - Review macro trends and adjust shared strategy
  - Set next quarter's priorities together

**We commit to implementing:**

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\_\_\_\_\_

**Measurable impact we expect:**

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## Exercise #5: The Culture Pledge

### *Our Shared Commitment to Revenue Growth*

We, the Sales and Marketing teams, commit to operating as one unified revenue team.

### **Our Shared Understanding**

We recognize that sales is a full-cycle journey that requires collaboration at every stage:

- **Marketing's Role:** Attract, educate, and qualify leads; provide content and insights that enable sales success
- **Sales' Role:** Convert qualified leads, provide feedback on lead quality, and share customer insights back to marketing
- **Sales Ops' Role:** Provide data, reporting, and systems that enable both teams to make informed decisions

### **Our Core Commitments**

We pledge to:

- Use shared language and eliminate blame-based assumptions
- Celebrate wins together and learn from losses as a team
- Make decisions based on data, not gut feelings or departmental bias
- Prioritize customer value over internal turf battles
- Experiment together, test changes, and iterate quickly
- Maintain regular communication and feedback loops
- Hold ourselves accountable to shared metrics and goals

### **Our Shared KPIs and Metrics**

**Annual/Quarterly Goals:**

- Revenue Growth: \_\_\_\_\_% year-over-year
- Percentage to Target: \_\_\_\_\_%
- Customer Success Stories: \_\_\_\_\_ per quarter/year
- Lead Quality Improvements: \_\_\_\_\_ new changes or tests
- Lead Conversion Rate: \_\_\_\_\_%
- Time to Close: \_\_\_\_\_ days

- Other:

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## **Our Action Plan**

### **What we'll start doing:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### **What we'll stop doing:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### **What we'll continue doing:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_