

# **7 SALES AND MARKETING ALIGNMENT BEST PRACTICES**



## Executive Summary

B2B buyers expect expert guidance at critical moments of their independent research and buying process. Organisations that prioritise sales and marketing alignment are nearly three times more likely to exceed new client acquisition targets, and buyers are 1.8x more likely to complete a high-quality deal when digital tools are paired with a sales representative ([Gartner 2025](#)).

This article outlines seven best practices for building a unified, buyer-centric engine, spanning shared strategy, measurement, handoffs, and continuous improvement, to accelerate consensus and revenue.

Read to discover:

- **The importance of a unified sales and marketing strategy**
- **Shared KPIs to align goals and metrics**
- **Effective handoff methodology to prevent prospect drop-off**



Organisations that prioritise sales and marketing alignment are nearly three times more likely to exceed new client acquisition targets ([Gartner 2025](#)).

In fact, the [Gartner B2B Buying report](#) found that B2B buyers are almost twice as likely to complete a high-quality deal when they [engage with digital tools](#) in partnership with a sales representative, emphasising the importance of a coordinated approach between marketing, who create the enablement materials for sales teams to meet evolving buyer expectations.

However, within B2B organisations, marketing and sales teams are typically defined by their core responsibilities. Marketers are focused on building brand awareness, managing the buyer experience, and generating demand, while sales teams work to generate revenue by managing conversion rates and relationships with prospects and clients.

In the complex B2B market defined by changing buying behaviour, misalignment between these teams can lead to lost opportunities and wasted budget.

**In this article, we explore steps for enhancing marketing sales alignment to create an integrated, buyer-centric strategy that choreographs learning moments across the buying journey.**

## Why should you align sales and marketing to engage today's buyers?



Modern buyers want independence. In fact, according to the [INFUSE Voice of the Buyer 2025 report](#), 75% of buyers prefer a sales representative-free experience entirely. However, buyers still need guidance to enable them to confidently make decisions. The challenge lies in only 23% of buyers believing sales teams truly understand whether a solution fits their needs, and a mere 8% feel that sales teams offer unique insights ([State of Revenue 2025](#)).

This gap exposes a clear disconnect between the buyer knowledge held by marketing and the experience ultimately delivered by sales.

To meet these expectations, sales and marketing must work in lockstep, share data, unify messaging, and coordinate outreach. This allows teams to uncover signals, provide relevant value at every touchpoint, and lead buying committees to confident, consensus-driven decisions.

‘Organisations that align marketing, sales, and client success teams around unified buying group strategies create seamless experiences that resonate across every touchpoint. When teams operate in silos, those disconnects become immediately visible to buyers, undermining trust and positioning at the moment it matters most’.



— **Victoria Albert**  
CMO, INFUSE

[Discover six crucial steps for engaging defensive buying groups](#)



## 7 Sales and marketing alignment best practices



Below are seven steps to create a successful strategy for aligning sales and marketing teams.

### 1 United sales and marketing strategy

An organisation-wide buyer-centric framework validates the need for a unified approach that respects buyer autonomy while providing the necessary support.

When everyone follows the same project scope, clearly aligned on who, where, and when they are targeting, buyers get a smoother, more consistent experience that builds trust and helps them reach consensus faster.

A unified sales and marketing strategy starts with a documented playbook that defines roles, responsibilities, and repeatable processes for every stage of the buyer journey.

Good communication is crucial for the inter-departmental transparency necessary for sales and marketing alignment. One way to improve communication is by investing in a streamlined process and placing a limit on official channels for internal communication. This helps to reduce miscommunication and projects getting lost in a mountain of emails and messages.

#### BEST PRACTICES FOR IMPLEMENTATION INCLUDE:

**Add a governance model** that includes an executive sponsor, alignment council, and monthly working group

**Document a single playbook** with ICPs and buyer personas, target segments, channels, messaging pillars, and escalation paths

**Define SLAs in the CRM**, such as prospect routing, response time, qualification criteria, and required fields

## 2 Shared KPIs and metrics

True alignment happens when sales and marketing measure success the same way.

Creating shared KPIs for conversion rates and prospect value can give teams a common goal.

Setting ROI metrics between both teams can also help to determine and [demonstrate the value of marketing strategies](#), which may otherwise be difficult to prove.

Closed-loop reporting then feeds actual revenue outcomes back into the planning cycle, allowing both teams to refine budgets, adjust messaging, and double down on the channels that consistently deliver results.

### Examples of combined sales and marketing KPIs include:

- **MQL-to-SQL conversion rate:** Percent of marketing-qualified leads accepted by sales, indicating prospect quality and alignment
- **SQL-to-opportunity conversion rate:** Share of SQLs that become pipeline opportunities, showing the effectiveness of discovery and handoff
- **Lead-to-close rate:** Overall funnel effectiveness from first lead to closed-won
- **Marketing-sourced win rate:** Closing effectiveness on marketing-originated opportunities, benchmarking prospect quality vs other sources
- **Sales cycle length:** Average days from first marketing touch to closed-won, reflecting buyer friction and enablement

### BEST PRACTICES FOR IMPLEMENTATION INCLUDE:

- **Add closed-loop reporting cadence**, including weekly ops review and monthly business revenue
- **Tie each metric to decisions** such as budget shifts, content roadmap, and enablement

[Explore the four pillars of a successful buyer enablement strategy](#)



### 3 Mutual understanding of buying groups

According to the [Salesforce State of Sales 2024 report](#), 86% of buyers are more likely to buy when their goals are understood. This emphasises the importance of adopting buyer enablement as the number one tactic to nurture buyer interest.

An integral part of aligning teams is built on a thorough understanding of the company's client base and [buyer personas](#). Buyer personas can help sales teams recognise who they are selling to, what they care about, and how to meet the needs of B2B sales prospects.

Understanding and performing regular analysis of how buying groups purchase products is another important element of aligning and orienting teams.

#### Both teams should track sales and share insights into the following data:

- The objectives of the buyer
- The activities they engage in
- The information they consume
- The modes of communication
- The timescale of the whole process

#### BEST PRACTICES FOR IMPLEMENTATION INCLUDE:

- **Agree on deliverables**, including buyer persona one-pagers, buying committee maps, stage-based content maps, and a list of intent signals per persona
- **Use and expand the existing data list** that covers objectives, activities, information consumed, communication modes, timescale, and connect it to sales enablement content

## 4 Coordinated campaign planning

By working together, sales and marketing can create a cohesive [demand generation program](#) built on a shared understanding of who is being targeted, what their needs and challenges are, where they are in the buying journey, and which channels they prefer.

Involve sales teams early in the development of [content marketing](#) and demand generation strategies so they can contribute real buyer insights, suggest content topics, validate messaging, and ensure outreach aligns with the conversations they are having on the ground.

A shared knowledge of buyer behaviour is essential for guiding messaging and content usage across the entire sales cycle. With this visibility, marketing can develop targeted sales enablement materials that equip representatives with the right context, insights, and resources to address buyer questions with confidence and keep deals moving forward.

### BEST PRACTICES FOR IMPLEMENTATION INCLUDE:

- **Establish a joint planning cadence**, such as quarterly GTM planning and biweekly syncs during launch
- **Involve sales early** for message validation and “field reality” checks. Create shared briefs per campaign with audience, pain points, offers, channels, and follow-up plays

[Create demand generation content aligned with your buyers' needs](#)



## 5 Facilitate the marketing to sales handoff

Achieving full alignment on when sales teams should take over engagement maintains momentum with prospective buyers.

A clear handoff process prevents the loss of valuable conversion opportunities that can occur when outreach happens too late or when prospects are contacted too early in the sales cycle, such as during the [awareness stage](#).

Sales teams should receive comprehensive information about every incoming prospect. This reduces friction as prospects progress through the B2B sales funnel and transition from sales development representatives (SDRs) to account executives (AEs).

With better visibility into each prospect's background, behaviour, and intent signals, sales teams can deliver a more personalised experience to prospects throughout the sales cycle.

Teams can also analyse performance and account data to determine which sales representatives are best suited for each opportunity and to ensure the right individuals engage with stakeholders.

### BEST PRACTICES FOR IMPLEMENTATION INCLUDE:

- **Add a handoff checklist in CRM** that includes prospect source and last touch; content consumed; buying role; account context; intent score; recency/frequency; suggested next best action; and SLA (e.g., same-business-day outreach)
- **Clarify the SDR to AE transition rules** and required discovery notes to prevent resets

## 6 Review your progress and adjust accordingly

Ongoing evaluation is essential for sustaining high performing demand programs.

Regularly reviewing performance across inbound and outbound motions enables teams to identify what is working, where friction exists, and which touchpoints are influencing progression through the funnel. This includes examining [intent signals](#), program effectiveness, conversion rates, and overall pipeline contribution.

Strong cross-functional alignment strengthens this process. When sales and marketing operate from shared data and unified definitions of success, they can collaboratively refine content, optimise targeting, enhance outreach strategies, and reallocate resources to the initiatives that deliver the greatest impact.

This closed-loop feedback cycle not only improves current performance but also ensures future demand programs are more precise, relevant, and predictable.

### BEST PRACTICES FOR IMPLEMENTATION INCLUDE:

- **Establish recurring reviews** that includes weekly pipeline hygiene, monthly conversion analysis, quarterly win/loss and journey friction review
- **Define owners for remediation and adjusting targeting**

[Discover the 5 top nurturing mistakes costing you pipeline](#)



## 7 Promote buyer-centricity across the organisation

Promoting **buyer-centricity** throughout a B2B organisation is essential for aligning marketing, sales, product, and client success teams around the needs, behaviours, and goals of the buyer.

When every team understands the buyer's journey, interactions and communications become more relevant and personalised, improving the overall client experience and building trust.

This, in turn, drives higher conversion rates and revenue by targeting messaging to real buyer needs and reducing effort spent on unqualified prospects.

By focusing on buyer behaviour and intent signals, organisations can make data-driven decisions that guide product development, messaging, and campaign strategy, and strengthen long-term client relationships.

In competitive markets, a buyer-centric approach differentiates the organisation by positioning it as a partner invested in the buyer's success rather than simply a provider of products.

### BEST PRACTICES FOR IMPLEMENTATION INCLUDE:

- **Align marketing, sales, product, and client success teams** around shared buyer insights
- **Use data and analytics** to continuously refine messaging, campaigns, and offerings
- **Gather ongoing client feedback** to improve experiences and strengthen relationships
- **Focus on outcomes and value for the buyer**, not just product features

## Recommended resources

[Discover the 5 top nurturing mistakes costing you pipeline](#)



[Top Challenges Your Buyers are Experiencing and How to Overcome Them](#)



[How to Win Market Share by Increasing Discoverability](#)



## Key takeaways



Sales and marketing alignment best practices can be summed up as follows:

- **Align around a unified, buyer-centric strategy** with a shared vision, roles, and messaging across marketing and sales to deliver a seamless buyer experience
- **Integrate workflows and KPIs via a shared CRM.** Common systems and success metrics increase visibility and accountability across the funnel
- **Map buying groups and personas in detail** to capture goals, behaviours, and content preferences to tailor engagement for each decision maker
- **Equip sales with targeted enablement tools** to deliver stage-specific content and insights so sales reps can confidently address buyer questions and objections.
- **Ensure smooth handoffs from marketing to sales** using SLAs and prospect context to reduce friction and avoid drop-off when prospects transition between teams
- **Review performance together and optimise regularly** to adjust strategy based on what is converting and what is not
- **Adopt buyer-centric thinking organisation-wide** to foster alignment beyond sales and marketing to support consistent, insight-driven engagement at every touchpoint

### TURN MARKET SIGNALS INTO MEASURABLE GROWTH

INFUSE demand experts unify data, content, and channels to orchestrate full-funnel engagement across your key accounts.

[Connect with a demand expert to design your buyer-led GTM motion](#)



## FAQs



### 1. What are the most effective practices for aligning sales and marketing teams?

The best practices for aligning sales and marketing include building a unified, buyer-centric strategy, creating a shared playbook, aligning on KPIs, mapping buyer groups, planning campaigns jointly, managing a smooth handoff, and reviewing performance regularly.

### 2. How does aligning sales and marketing improve business performance?

B2B marketing and sales alignment increases buyer trust and speeds decision making. Aligned teams are nearly three times more likely to exceed new client acquisition targets and help buyers complete higher-quality deals.

### 3. What common challenges do companies face when aligning sales and marketing teams?

Common challenges include siloed processes, disconnected data, unclear roles, inconsistent messaging, and poor communication between teams, which lead to missed opportunities and wasted resources.

### 4. How can sales and marketing teams work better together?

Teams work better together by using a single shared playbook, defining mutual responsibilities, integrating tools and KPIs, involving sales early in planning, and holding regular joint performance reviews.

### 5. What are the main benefits of sales and marketing alignment?

Alignment improves lead quality, conversion rates, buyer experience, marketing ROI, and sales productivity by ensuring a seamless, value-driven journey for buying groups.

### 6. What tools support sales and marketing alignment?

INFUSE supports sales and marketing alignment by helping organizations build a unified, buyer-centric framework focused on shared strategy, data, messaging, and execution. This approach is grounded in aligning around the buyer's needs, using consistent processes across teams to create smoother, higher performing engagement.



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