



A Simple Audit to Validate Cross-Functional Alignment

(Before You Blame Execution)

Most B2B Leaders Believe Their Teams Are Aligned

Sales has targets. Marketing has campaigns. Product or service delivery has priorities.

They meet. They share updates. They nod along.

Everyone feels like they're working together. The calendar shows regular syncs. The Slack channels are active. The meetings happen.

On paper, alignment exists.

And yet the symptoms persist:

- Leads don't convert as expected
- Sales says the leads aren't right
- Marketing says sales isn't following up
- Product keeps building or delivering things "customers asked for"
- Everyone works hard, but results lag

The problem isn't effort. It's not commitment. It's not even competence.

The problem is that alignment in theory doesn't always translate to alignment in practice.

This Audit Tests a Specific Belief

"Our sales, marketing, and product teams meet regularly and work toward the same goals."

Not in theory. Not on the org chart. Not in the strategy deck.

In practice.

Where Misalignment Hides

Misalignment rarely looks dramatic. It doesn't announce itself in conflict or crisis. Instead, it shows up quietly in the daily friction between teams.

- Different definitions of a "good lead"
- Different priorities across teams
- Meetings that share information but don't create decisions
- Goals that sound similar but don't actually connect
- Feedback loops that exist but don't influence action

The Hidden Cost

When teams are misaligned, execution slows—even when everyone is competent, even when budgets are adequate, even when leadership is present.

You optimize tactics. You hire more people. You launch new initiatives. But the gap remains because the gap isn't in execution—it's in shared understanding.

This audit exists to surface that gap before it compounds into something more expensive to fix.

Why This Audit Was Developed

At Tingom Group, we work with B2B leaders who run tight operations. Their teams are experienced. Their processes are documented. Their meetings happen on schedule.

And still, we see the same pattern repeat: **teams working in parallel instead of working together.**

01

Sales operates on one set of assumptions

They know what a qualified lead looks like based on who closes. They prioritize conversations with prospects who match past wins.

02

Marketing operates on another

They generate demand based on what gets attention, what drives clicks, what fills the pipeline—regardless of whether those leads match sales' definition of quality.

03

Product or delivery operates independently

They build or refine based on what customers request, what seems innovative, or what internal stakeholders advocate for—without validating whether it serves the customer profile that sales and marketing should be pursuing.

04

The result is motion without momentum

Everyone is busy. Everyone is accountable to their function. But the business moves slower than it should because the functions aren't pulling in the same direction.

This audit was developed to answer one question clearly: Are our teams truly working toward the same outcomes—or just operating in parallel?

Who This Audit Is For

Designed For

This audit is built for leaders who need clarity, not complexity. It's practical, fast, and grounded in how B2B teams actually operate.

- **B2B founders and CEOs** who suspect alignment gaps but need evidence
- **Leadership teams in service businesses** where sales, marketing, and delivery must coordinate
- **Fractional leaders** (CFO, COO, CMO) brought in to diagnose operational friction
- **Teams scaling beyond founder-led sales** and entering cross-functional complexity

If your business depends on multiple functions working together to move a prospect from awareness to close to delivery, this audit applies to you.

What This Is Not

This audit is **not** a team-building exercise. It won't fix interpersonal conflict or improve meeting culture on its own.

It is **not** a meeting framework or a collaboration tool. It won't teach your teams how to communicate better.

It is a **fast alignment check** before problems compound. It surfaces gaps in shared understanding so you can address them with intention rather than reacting to symptoms.

Run it before you scale. Run it before you hire. Run it before you blame execution.

The Principle Behind the Audit

Alignment Is Not About More Meetings

Most teams already meet. They share updates, review metrics, discuss initiatives. The calendar is full. The communication is frequent.

But frequency doesn't equal alignment. Talking doesn't guarantee shared understanding.

Alignment Comes From Three Things

1. **Shared definitions** — teams agree on what words like "qualified lead" or "customer success" actually mean
2. **Shared goals** — teams work toward the same outcomes, not just compatible ones
3. **Shared feedback loops** — what one team learns influences what another team does

The Core Insight

If sales, marketing, and product are solving different problems—or worse, if they don't realize they're solving different problems—no amount of activity fixes the gap.

This audit checks whether alignment exists *where it matters*: in the definitions, goals, and feedback loops that guide daily decisions.

Running Example: Fictional Fractional CFO Firm

- ☐ **Throughout this guide, we'll use a fictional Fractional CFO firm** to illustrate how the audit works in practice. This example mirrors the patterns we see across B2B service businesses.

Their Starting Belief

"Sales, marketing, and delivery are aligned—we talk all the time."

The leadership team met weekly. Sales and marketing collaborated on campaigns. Delivery stayed in touch with customer needs.

On the surface, everything looked coordinated.

What They Wanted to Validate

The firm was growing, but conversion rates had plateaued. Marketing was generating more leads, but sales wasn't closing them at the expected rate. Delivery was stretched thin serving existing clients.

Leadership suspected a gap but couldn't pinpoint it. Were the leads wrong? Was sales underperforming? Was delivery distracted?

They needed evidence, not assumptions. They needed to test whether their belief in alignment matched reality.

The audit revealed what meetings couldn't: their teams were coordinating activities but not working toward the same definition of success. The conversations were frequent, but the clarity was missing.

Cross-Functional Alignment Audit (B2B)

Purpose: Quickly validate whether sales, marketing, and product/service teams are aligned around the same goals.

Owner: _____

When to Use: Quarterly, or when leads stall, sales friction increases, or priorities feel scattered.

Last Updated: _____

Section 1: Shared Goals & Definitions (5 points)

- ☐ Sales, marketing, and product share **one primary business goal**.
- ☐ All teams agree on what a **qualified lead** means.
- ☐ All teams agree on what **success looks like** for the customer.
- ☐ Team goals **do not conflict** with one another.
- ☐ Teams can explain how their work **supports the same outcome**.

Section 2: Regular, Purposeful Sync (5 points)

- ☐ Cross-functional meetings happen on a **regular cadence**.
- ☐ Each meeting has a **clear purpose**, not just updates.
- ☐ Customer feedback is **actively shared**, not siloed.
- ☐ Decisions and next steps are **explicitly documented**.
- ☐ The same issues **don't repeat** meeting after meeting.

Section 3: Feedback & Adjustment Loop (4 points)

- ☐ Sales feedback influences marketing priorities.
- ☐ Marketing insights influence sales messaging.
- ☐ Product or service changes reflect **real customer input**.
- ☐ Teams adjust based on results—not assumptions.

Section 4: Alignment Test (1 point — Pass / Fail)

- ☐ Can confidently answer: "If we improved one thing together this quarter, we all agree on what it is."

Scoring Model (15 Points Total)

1

2

How to Score

- Each checked item = **1 point**
- Section 4 = pass / fail
- If a box is unclear, score it **0**

Be honest. If you're unsure whether something is true, treat it as unchecked. Partial credit doesn't help—it hides the gap.

Interpret Your Score

Use the stoplight model to understand what your score means and what to do next.

The score isn't a grade. It's a diagnostic. It tells you where to focus, not whether you're succeeding or failing.

Green (12–15 points)

Aligned → Protect and Reinforce

Your teams share definitions, goals, and feedback loops. The work now is to maintain this alignment as you grow, as priorities shift, or as new team members join.

Don't assume alignment stays intact on its own. Revisit this audit quarterly to catch drift early.

Yellow (8–11 points)

Partially Aligned → Clarify and Tighten

You have some shared understanding, but gaps remain. Teams might coordinate on tactics without agreeing on outcomes. Meetings happen but don't produce aligned decisions.

Focus on the sections where you scored lowest. Don't try to fix everything at once—start with shared definitions or shared goals.

Red (0–7 points)

Misaligned → Reset Before Scaling

Your teams are working in parallel, not together. This isn't about effort—it's about operating from different assumptions.

Do not optimize execution yet. Do not add more meetings. Do not hire more people. Reset the foundation first: agree on definitions, align on one shared goal, and establish a feedback loop.

- If your score is yellow or red, do not optimize execution yet.** Misalignment compounds. Every initiative you launch, every hire you make, every dollar you spend will reinforce the gap instead of closing it.

Practical Application: What the Audit Revealed

The Fractional CFO Firm: What They Believed

"Sales, marketing, and delivery are on the same page. We meet weekly. We share updates. We're coordinated."

What the Audit Actually Revealed

Marketing's Definition

Marketing defined a lead as **any interested founder** who downloaded a guide, attended a webinar, or requested information. Volume mattered. Engagement mattered. Revenue size didn't.

Sales' Definition

Sales defined a lead as **a founder running a company with \$5M+ in revenue**, facing specific financial complexity that justified fractional CFO support. Anything below that threshold rarely converted.

Delivery's Focus

Delivery was focused entirely on **the clients they already had**—refining processes, improving reporting, responding to requests. They weren't involved in defining who the next client should be.

Meeting Structure

Their weekly meetings **shared updates but produced no decisions**. Each team reported what they were doing, but no one asked whether those activities served the same goal.

The firm scored **7 out of 15** on the audit. Red. Misaligned.

Not because anyone was underperforming. Because they were solving different problems.

Alignment Adjustments: What Changed

After running the audit, the Fractional CFO firm didn't overhaul their strategy. They didn't reorganize teams or launch new initiatives.

They made three targeted adjustments to create shared clarity.



Agreed on a Single ICP and Lead Definition

Marketing and sales aligned on one definition: a qualified lead is a founder running a \$5M–\$50M company facing financial complexity that requires strategic CFO support, not just bookkeeping.

Marketing stopped optimizing for volume and started optimizing for fit. Sales stopped blaming lead quality and started refining their messaging to match the new ICP.



Set One Shared Quarterly Goal

Instead of separate goals for each function, they committed to one shared outcome:

"Increase qualified founder conversations by 30%."

This forced coordination. Marketing couldn't hit the goal without sales feedback. Sales couldn't hit it without delivery insights on what made current clients successful.



Reframed Meetings Around Decisions

Their weekly syncs shifted from status updates to structured decision-making:

- What's working that we should do more of?
- What's not working that we should stop or adjust?
- What do we need to change together to hit our shared goal?

Delivery joined the meetings and started sharing patterns from current clients to inform marketing messaging and sales targeting.

The Result

Three months later, they ran the audit again. Their score: **12 out of 15**. Green.

Alignment didn't require new tools, new hires, or a strategy overhaul. It required shared clarity.

When **Not** to Use This Audit

This Audit Is Not Designed For

- **Resolving personal conflict** — if the issue is interpersonal tension, this audit won't fix it. Address the relationship issue first.
- **Performance reviews** — this isn't a tool to evaluate individuals or functions. It's a systems diagnostic, not a people evaluation.
- **Mid-crisis without leadership presence** — if you're in the middle of a major issue, stabilize first. This audit works best as a preventive or diagnostic tool, not a crisis response.

The Right Timing

Run this audit **before** misalignment becomes blame.

Use it quarterly as a routine check. Use it when you notice friction but can't identify the source. Use it before you scale, before you hire, before you launch something new.

Don't wait until the gap is obvious. By then, you're managing symptoms instead of addressing root causes.

How Tingom Group Uses This Audit

At Tingom Group, we don't sell alignment. We help leaders see where it exists and where it doesn't—with evidence, not assumptions.



Create Shared Language Across Teams

When sales, marketing, and delivery use the same definitions, coordination becomes easier. We use this audit to surface where language differs and help teams agree on what words actually mean in practice.



Reduce Friction Between Functions

Most friction comes from mismatched expectations, not bad intentions. This audit reveals where expectations diverge so teams can reset without blame.



Align Execution to Outcomes

Activity isn't the same as progress. We use this audit to help teams focus on whether their work serves the same outcome—not just whether they're staying busy.



Prevent Strategy Drift

Alignment decays over time. Priorities shift. People join. Markets change. This audit helps catch drift early, before it becomes expensive to correct.

- This audit doesn't replace leadership.** It supports it—with evidence, structure, and a clear path forward. It gives leaders something concrete to act on instead of guessing where the gaps are.

Before You Move On

You just worked through a cross-functional alignment audit designed to test whether your teams share definitions, goals, and feedback loops.

That's not a small thing. Most teams never examine alignment this directly. They assume it exists because meetings happen, because people communicate, because everyone works hard.

You chose to look closer. That matters.

What This Tool Was Meant to Do

This audit was designed to surface gaps in shared understanding before they compound into execution problems. It wasn't built to fix alignment—it was built to reveal where alignment exists and where it doesn't, so you can address the gaps with intention rather than assumptions.

It's a diagnostic, not a solution. The work of creating alignment still requires leadership, conversation, and deliberate adjustment. But now you have evidence to guide that work.

A Note on Unclear or Incomplete Results

If your score came back lower than expected—or if some sections felt harder to evaluate than others—that's normal. Alignment gaps don't announce themselves clearly. They show up as friction, miscommunication, or results that don't match effort.

If you found yourself debating whether to check certain boxes, that uncertainty is diagnostic. It means the shared clarity isn't there yet. Don't smooth over the ambiguity. Treat it as useful information.

Some teams will score well in one section and poorly in another. That's expected. Alignment isn't binary. The goal isn't perfection—it's awareness.

Where You Might Go From Here



Learn: Understand Related Patterns

If alignment gaps showed up in this audit, they likely connect to other areas: ICP clarity, lead generation definition, or messaging consistency. Explore the **ICP Clarity Audit** or **Lead Generation Audit** to see where upstream clarity might help.



Validate: Test with Your Team

Run this audit with each function separately, then compare results. If sales, marketing, and delivery answer differently, that divergence is evidence of the gap. Use the comparison to start a structured conversation about shared definitions and goals.



Align: Build a Shared Operating Rhythm

If your score revealed partial or full misalignment, consider creating a **30-minute cross-functional sync agenda** focused on decisions, not updates. Or build a **quarterly alignment worksheet** to track how definitions and goals evolve. We can help adapt this audit into a routine system.

About Tingom Group

Tingom Group works with B2B leaders who need operational clarity before they scale. We don't promise transformation or offer proprietary frameworks. We help you see your systems clearly, align your teams around shared outcomes, and build processes that support how people actually work.

We're not consultants who parachute in with answers. We're guides who help you find the answers that already exist in your business—and structure them in ways that stick.

If you want to continue this work—whether that means adapting this audit for your team, pairing it with other FlowOps360™ assets, or building a custom alignment system—just tell us where this goes next.