

Data and Signals Readiness Scorecard

Use this **scorecard** to quickly assess where your sales organization stands today. Tick the box that best matches your current situation in each category.

CRM Usage

- CRM is consistently used and kept up to date (Tech Elite or Middle)
- CRM exists but is only partly used (Middle)
- No CRM or very inconsistent use (Unstructured)

Data Quality

- Company size, industry, and growth trends are tracked for most accounts (Tech Elite)
- Some data fields are filled but not consistent (Middle)
- Data is incomplete or missing (Unstructured)

Signal Tracking

- Buying signals (proposal opens, funding rounds, website visits) are automated and integrated (Tech Elite)
- Signals are tracked manually or in separate tools (Middle)
- No signals are tracked (Unstructured)

Outreach Approach

- Outreach is based on live signals (Tech Elite)
- Outreach is based on CRM lists and manual research (Middle)
- Outreach is based on gut feeling or cold lists (Unstructured)

Cross-Team Use

- Sales, marketing, and customer success all see and use the same data (Tech Elite)
- Some teams use the data, others do not (Middle)
- Data is siloed and not shared across teams (Unstructured)

Scoring

Mostly Tech Elite answers → You are already advanced.

Mostly Middle answers → You have the basics but rely too much on manual work.

Mostly Unstructured answers → Big upside ahead with even small improvements.