

Sales & Marketing Assessment Scorecard

DeltaPoint Partners

Purpose: Quickly assess the strength, consistency, and effectiveness of your sales and marketing engine and identify where focused improvement will create the biggest revenue impact.

How to Use

- Score each item from 1–5
 - 1 = Not in Place
 - 3 = Somewhat In Place / Inconsistent
 - 5 = Clearly Defined, Consistent, and Measured
- Total your score at the end

1. Sales Foundation

Item	Score (1–5)
Ideal customer profile is clearly defined	<input type="checkbox"/>
Sales process is documented and repeatable	<input type="checkbox"/>
Decision-makers and buying triggers are known	<input type="checkbox"/>
Sales cycle length is understood	<input type="checkbox"/>
Conversion rates are tracked	<input type="checkbox"/>

Section Total: ___ / 25

Notes/Comments:

2. Marketing Visibility & Messaging

Item	Score (1-5)
Value proposition is clear and differentiated	<input type="checkbox"/>
Messaging resonates with decision-makers	<input type="checkbox"/>
Website clearly communicates credibility and trust	<input type="checkbox"/>
Brand shows up consistently in the market	<input type="checkbox"/>
Prospects recognize the brand before outreach	<input type="checkbox"/>

Section Total: ___ / 25

Notes:/Comments

3. Lead Generation & Pipeline Health

Item	Score (1-5)
New leads are generated consistently	<input type="checkbox"/>
Lead sources are diversified	<input type="checkbox"/>
Pipeline supports revenue goals	<input type="checkbox"/>
Future revenue is visible 3-6 months out	<input type="checkbox"/>
Lead quality is improving over time	<input type="checkbox"/>

Section Total: ___ / 25

Notes/Comments:

4. Follow-Up & Consistency

Item	Score (1-5)
Follow-up process exists beyond 3 touches	<input type="checkbox"/>
Long-term prospects are nurtured	<input type="checkbox"/>
Systems or automation support follow-up	<input type="checkbox"/>
Sales activity is consistent week-to-week	<input type="checkbox"/>
Opportunities are not lost due to inaction	<input type="checkbox"/>

Section Total: ___ / 25

Notes/Comments:

5. Strategy & Execution Alignment

Item	Score (1-5)
Sales and marketing efforts are aligned	<input type="checkbox"/>
Leadership has clarity on growth priorities	<input type="checkbox"/>
Time is spent on revenue-driving activities	<input type="checkbox"/>
Performance is reviewed and adjusted regularly	<input type="checkbox"/>
Growth strategy is intentional (not reactive)	<input type="checkbox"/>

Section Total: ___ / 25

Notes/Comments:

TOTAL SCORE Overall Score: ___ / 125

Score Interpretation:**0–50 | Reactive:**

- Growth depends on referrals, timing, and effort—not systems.

51–80 | Active but Inconsistent:

- Activity exists, but results are unpredictable.

81–105 | Structured but Under-Leveraged:

- Strong foundation with gaps in consistency and optimization.

106–125 | Scalable:

- Clear systems, strong execution, and predictable growth.

What You Feel You Need Support On

“Based on what you just reviewed, I’d love to understand this from your perspective.”

Clarity & Priorities

1. *What stood out most to you as you went through the scorecard?*
2. *Where did you score yourself lower than you expected?*
3. *If you could improve just one area in the next 90 days, which would it be and why?*
4. *What do you feel is currently holding growth back the most?*

Sales Process & Pipeline

5. *Where do deals tend to stall or slow down?*
6. *How confident are you in your pipeline right now?*
7. *What part of the sales process feels the least predictable?*
8. *Are you relying more on effort or on a system today?*

Marketing & Visibility

9. *Do you feel your ideal prospects clearly understand what makes you different?*
10. *How consistently are you showing up in front of your market today?*
11. *Where do you think trust breaks down before someone decides to engage?*
12. *What marketing activities feel productive vs. just “busy”?*

Follow-Up & Consistency

13. *What usually happens after the first or second conversation with a prospect?*
14. *How comfortable are you with your follow-up cadence?*
15. *Do you feel opportunities are being lost simply due to timing or lack of visibility?*
16. *What happens when a prospect says “not right now”?*

Time, Focus & Resources

17. *Where are you personally spending the most time related to growth?*
18. *What’s pulling your attention away from revenue-generating activities?*
19. *If you had more capacity, what would you focus on first?*
20. *What feels hardest to stay consistent with today?*

Support & Expectations

21. *What kind of support would be most helpful right now?*

- Strategy & clarity
- Execution & follow-up
- Systems & structure
- Visibility & outreach
- Accountability

22. *What does “success” look like for you 6–12 months from now?*

23. *What would make you feel confident you’re moving in the right direction?*

24. *Have you tried addressing these challenges before? What worked or didn’t?*

Future-Focused (Soft Close Without Pressure)

25. *If nothing changes over the next 6 months, how does that impact your goals?*

26. *What would it mean to have a more predictable, consistent pipeline?*

27. *Would it be helpful to see what this typically looks like when it’s structured?*

Optional Next Step

If you’d like, DeltaPoint Partners can walk you through your score, identify the biggest growth constraints, and outline what progress typically looks like over the next 90 days.