

Marketing readiness: an evidence-led decision scorecard



AI concept illustration. Editorial content and working models: Patrick Wings.

Turn gut feelings into verifiable decisions with scoring anchors, a fictional worked case and an editable evidence register.

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HOW TO USE THIS RESOURCE

For founders, marketing leaders and sales teams preparing a launch, budget increase or market entry.

Your practical outputs

- Eight evidenced individual scores instead of a single grade
- Critical launch blockers with accountable owners
- Three prioritized work orders with acceptance criteria
- A documented start, wait and stop decision

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01 / What this scorecard decides

You want to know whether marketing can absorb additional budget or needs stronger foundations first. This scorecard examines eight practical work areas. It scores documented decisions and observable processes, rather than self-descriptions such as “our positioning is strong.” The output is a prioritized work order with accountable owners, evidence and a date for reassessment.

The score is an internal management aid, not a scientifically validated maturity model or a revenue forecast. A strong average cannot compensate for a critical failure. Missing permission to send messages, broken forms or unsupported product claims must be resolved regardless of the total. Before the workshop, define the actual decision: launching campaigns, increasing spend, entering a market or handing work to a new team.

02 / Agree the scoring rules before scoring

Each area receives zero to three points. Always use the lowest anchor that is fully evidenced. A document naming an audience can support a written hypothesis; it does not demonstrate that sales and marketing actually use it. Record missing information as “unknown” rather than treating it as an existing capability.

A second person checks every assessment against the same evidence. When reviewers disagree, retain the lower score until specific evidence resolves the gap. Save the date, market and product version. A scorecard for a German enterprise offer does not automatically apply to an English self-service product. An anonymized extract usually provides enough evidence without distributing complete customer records.

Anchor	Evidence	Insufficient
0 / Unknown	No verifiable working foundation	Verbal confidence
1 / Described	Dated hypothesis with an owner	Unreviewed deck without ownership
2 / Applied	Used in two specific instances	A single completed document
3 / Reviewed	Application and documented review	A high score without an issue log

03 / The eight areas to inspect

Inspect target customers, positioning, offer, demand, website, measurement, handover and capacity separately. Choose a small evidence bundle that the team can actually read. A current campaign, anonymized interview notes and a form test are more useful than twenty unrelated documents.

The score measures the reliability of the working process, not company size. A small team can run a sound process in a spreadsheet; a large automation platform can simply distribute weak assumptions faster. Do not award maturity points for owning a particular tool. What matters is whether another person can understand, execute and check the process.

Area	Evidence of application	Guiding question
Target customers	Won/lost cases by segment	Whom do we deliberately exclude?
Positioning	Message in sales conversation and landing page	What is the specific difference?
Offer	Documented scope and entry point	What does the customer receive?
Demand	Live activity with a learning question	Which demand assumption are we testing?
Website	Form journey and content review	Can a suitable prospect take action?
Measurement	Test record from click to CRM	Do definitions and transmission match?
Handover	Accepted and rejected cases	Who owns which next action?
Capacity	Calendar and named ownership	Who can handle the response?

04 / Turn scores into a decision

Add the eight equally weighted scores for a maximum of 24 points. Divide by 24 if you need a percentage for internal comparisons. Always show the individual scores and the number of unknown evidence items alongside it. A percentage alone hides bottlenecks and should not be presented as a public marketing-quality rating.

Avoid artificial precision such as “scale once you reach 76 percent.” Write a decision rule for the proposed activity. A limited campaign test may begin once the audience and offer are described, the form passes a real test, measurement is traceable and response capacity exists. A larger budget release needs sufficiently reliable results from that same offer. This is a management judgment, not a universal law.

05 / Worked example: Nordlicht Systems

Nordlicht Systems is a completely fictional maintenance-software vendor. Every figure is a teaching assumption, not a client result or a recommended budget. The team wants to begin a new DACH campaign test. Sales recognizes a promising segment, but that shared understanding is not yet reflected on the website.

The first assessment totals 11 out of 24: target customers 2, positioning 1, offer 2, demand 1, website 2, measurement 0, handover 1 and capacity 2. The main finding is not the total. A test form fails to create a CRM record. Without a fix, inquiries would be invisible. The team therefore postpones launch and appoints an owner for the integration and an independent retest.

06 / Prioritize causes rather than symptoms

Sort findings by blocking status first, then impact and finally effort. A launch blocker prevents the intended process entirely. A quality gap allows execution but makes decisions less reliable. An enhancement improves convenience without changing the next decision.

In the fictional example, the CRM integration comes before another advertising variant. Next, the team tightens the audience message and handover. A longer brand presentation stays in the backlog. Explain every priority through the decision it enables. This turns “we need better content” into a testable assignment: the new page explains which maintenance teams the offer serves and which first step they can book.

Finding	Decision	Acceptance criterion
Form does not reach CRM	Block launch	Test record exists once and is complete
Audience too broad	Clarify before testing	Sales distinguishes suitable and unsuitable cases
Many clicks, unclear definition	Correct measurement definition	Contacts, inquiries and conversations are separate
Another creative idea	Test after foundations	One new hypothesis with other conditions held stable

07 / Collect useful evidence

Ask every accountable person for exactly one current evidence item and one counterexample before the workshop. A counterexample might be a lost opportunity, a confused inquiry or a failed tracking test. It prevents the team from assessing only its most successful moments.

Maintain an evidence index containing title, date, owner, tested process and access rights. Do not copy personal interview notes into a widely accessible scorecard. Link to an approved summary instead. If evidence conflicts or predates a relevant product change, flag the area for another check. A good result from an old process does not verify a process that has since changed.

08 / A 90-minute workshop with a usable output

Prepare the evidence and empty scoring fields in advance. Use the first ten minutes to agree the decision and explain the anchors. Each participant then scores silently for twenty minutes before the group spends fifteen minutes discussing differences. This reduces the risk of the most senior person determining the scores.

Reserve another twenty minutes for blockers and no more than three immediate work orders. Spend the final twenty-five minutes on accountable owners, acceptance criteria, timing and the decision record. If evidence cannot be inspected during the meeting, do not award an optimistic provisional score. Assign a specific verification task. The result is an executable plan rather than a slide displaying an attractive average.

09 / Limit actions and verify completion

Every task needs an output another person can verify. “Improve tracking” is too broad. “Submit the form on a mobile device, inspect the CRM record and source field, and document the confirmation” is executable. The reviewer should not be the same person who fixed the problem.

Nordlicht begins with three tasks: repair the CRM connection, write explicit target-customer exclusions, and rehearse one accepted and one rejected sales case. Only then is the assessment repeated. Further tasks can be added, but they must not silently displace the agreed foundations. Whenever scope changes, the owner records its effect on the launch date and the proposed test.

10 / Keep reassessments comparable

After the agreed work cycle, review the same areas using the same anchors. Show changed evidence next to the previous version. If you change a definition, start a new assessment series and label the break. Otherwise a changed measuring stick can look like genuine progress.

An increase from 11 to 16 points in the fictional example would be meaningful only if specific applications and reviews had been added. It would prove neither stronger demand nor better economics. Keep actual business observations separate: processed inquiries, suitable conversations, sales feedback and sample limitations. Operational readiness and market success are related but different questions.

11 / Spot common scoring errors

The most common errors are treating installed software as a functioning process, scoring documentation instead of application, and transferring success from a different segment. For every high score, ask what a skeptical new colleague would see if they had to perform the process themselves tomorrow.

Another error is hidden weighting through discussion. If five people discuss ads while nobody understands the CRM process, the channel starts to feel more important. Equal weighting makes this bias more visible but cannot eliminate it. If risks differ substantially, you may change weights, provided they are agreed before scoring and the unweighted individual values remain available.

12 / Document the resulting decision

Finish with a short decision: what will start, what will wait and what must be demonstrated first? Add an accountable owner and a date. Include a stop rule, such as repeated data-transfer failures or missing response capacity. This keeps a limited test genuinely limited.

Use the worksheet as an operating tool rather than a certificate. After the first round, every row should lead to a specific question the team can answer. If the assessment produces only “we need to improve everything,” the scope is too broad. Select the bottleneck preventing the next useful marketing decision and resolve it first.

Worksheet: evidence-based marketing readiness

Replace the fictional example with your situation. Award 0-3 only with dated evidence; leave unknown values blank. Name the reviewer and acceptance criterion.

[Open the editable worksheet in Excel / Google Sheets](#)

Area	Score 0-3	Evidence / date	Gap / next check	Owner / due date
Measurement - fictional example	0	Test form / sample date	CRM record missing; retest submission	Operations / before launch
Target customers			Review exclusions with sales	
Positioning			Check message against interview notes	

Area	Score 0-3	Evidence / date	Gap / next check	Owner / due date
Offer			Review scope and entry step	
Demand			Define learning question and test scope	
Website			Test mobile form journey	
Measurement			Reconcile source and CRM record	
Handover			Test accepted and rejected cases	
Capacity			Confirm response capacity in calendar	

Application questions

Can I use the scorecard without a CRM?

Yes. A maintained spreadsheet can make inquiries and handovers traceable. Still inspect duplicates, ownership and the path from form submission to response. Owning software does not earn points.

What should I do when data is missing?

Mark the evidence as unknown and define a specific collection task. Do not replace missing information with industry averages or the opinion of the loudest person in the room.

What total score is good?

This framework has no validated universal threshold. Decide using the proposed activity, critical blockers and evidenced individual scores. Use the total only as an internal summary under unchanged rules.

How often should we reassess?

After completing an action cycle or materially changing the product, target market or sales process. More frequent scoring without fresh evidence creates administration rather than insight.