

ORR CONSULTING

The B2B Marketing Scorecard

30 questions to see whether your marketing is building pipeline you can measure.

For CEOs, CFOs, and sales and marketing leaders at B2B companies with \$5M to \$500M in revenue.

Linda Orr, PhD

Fractional CMO and marketing measurement specialist

Why I wrote this

B2B marketing has a harder measurement problem than most. Deals take months, several people sign off, and the revenue lands in the CRM long after the campaign that started it. So marketing reports leads, sales reports deals, and nobody can say with confidence which spend is building pipeline. That gap gets expensive when leadership, a board or a buyer starts asking.

This scorecard covers the ground I look at when I start work with a B2B company. It runs across six areas: pipeline tracking, account targeting, positioning, demand generation, sales enablement, and budgeting. You can work through it in about 30 minutes with your marketing lead and your head of sales in the room. The conversation it starts is usually worth more than the score.

Answer honestly. A low score is useful. It tells you where to look first.

How to score it

- 0 No, or you don't know. If nobody in the room can answer confidently, score it 0.
- 1 Partly. It exists but is incomplete, out of date, or depends on one person.
- 2 Yes, and you could show the evidence today.

Each section has five questions worth up to 10 points. Add your section subtotals on the last page for a total out of 60.

The six areas

01

Pipeline tracking and CRM

If the CRM can't say where revenue came from, nobody else can either. Start here.

02

Ideal customer and account targeting

Most B2B companies already hold the data that separates their best accounts from the rest.

03

Positioning and proof

Buyers compare you with competitors, with doing nothing, and with building it themselves.

04

Demand generation and channels

A cheap lead that never becomes an opportunity is the most expensive lead you buy.

05

Sales and channel enablement

Marketing that sales can't use is a cost center.

06

Budget, planning and reporting

A B2B budget should start from the pipeline you need and work backward.

01 Pipeline tracking and CRM

If the CRM can't say where revenue came from, nobody else can either. Start here.

QUESTION		SCORE
1	Does every lead in your CRM have a source that marketing and sales both trust? <i>What good looks like:</i> Source and campaign are captured automatically on every lead and opportunity, instead of typed in by reps afterward.	☐ 0 ☐ 1 ☐ 2
2	Can you trace closed revenue back to the marketing that first brought the account in? <i>What good looks like:</i> Closed deals carry their original source and the source of the opportunity, so revenue by channel is a standard report.	☐ 0 ☐ 1 ☐ 2
3	Are qualified opportunities and closed deals sent back to your ad platforms? <i>What good looks like:</i> Google, LinkedIn and Meta optimize toward real pipeline, so they stop chasing cheap form fills.	☐ 0 ☐ 1 ☐ 2
4	Do marketing and sales use the same definitions of a lead, a qualified lead and an opportunity? <i>What good looks like:</i> Written definitions both teams signed off on, applied the same way in the CRM.	☐ 0 ☐ 1 ☐ 2
5	Could you pull 24 months of leads, opportunities and closed revenue by month and source in one day? <i>What good looks like:</i> The history is clean enough to model, forecast from and show a board.	☐ 0 ☐ 1 ☐ 2
SECTION SUBTOTAL		<u> </u> / 10

02 Ideal customer and account targeting

Most B2B companies already hold the data that separates their best accounts from the rest.

QUESTION		SCORE
6	Is your ideal customer defined from your own closed deals? <i>What good looks like:</i> The profile comes from analysis of your best customers' size, industry, use case and margin.	☐ 0 ☐ 1 ☐ 2
7	Do you know which customer segments are most profitable, beyond which are largest? <i>What good looks like:</i> Margin and retention by segment are known, and targeting follows them.	☐ 0 ☐ 1 ☐ 2
8	Is there a tiered target account list that sales and marketing both work? <i>What good looks like:</i> A, B and C accounts have owners and a plan, and the list is refreshed at least twice a year.	☐ 0 ☐ 1 ☐ 2
9	Do you know who sits on the buying committee for a typical deal? <i>What good looks like:</i> The people who influence, approve and use the product are mapped by role.	☐ 0 ☐ 1 ☐ 2
10	Have you interviewed recent buyers and lost prospects in the last year? <i>What good looks like:</i> Structured win and loss interviews feed positioning, pricing and sales training.	☐ 0 ☐ 1 ☐ 2
SECTION SUBTOTAL		<u> </u> / 10

03 Positioning and proof

Buyers compare you with competitors, with doing nothing, and with building it themselves.

QUESTION		SCORE
11	Can every rep explain in one sentence why a customer should choose you over the main alternative? <i>What good looks like:</i> One consistent answer shows up across reps, the website and proposals.	☐ 0 ☐ 1 ☐ 2
12	Is your messaging built for each role on the buying committee? <i>What good looks like:</i> Finance, operations, technical and end-user buyers each get the proof that matters to them.	☐ 0 ☐ 1 ☐ 2
13	Do you have proof a skeptical buyer would accept? <i>What good looks like:</i> Current, specific case studies, data and references by industry and use case, cleared for use.	☐ 0 ☐ 1 ☐ 2
14	Can a buyer tell from your website what you sell, who it's for and how pricing works? <i>What good looks like:</i> Prospects can qualify themselves before they ever talk to sales.	☐ 0 ☐ 1 ☐ 2
15	Is your positioning based on research with buyers? <i>What good looks like:</i> It comes from customer interviews, win and loss data or survey results.	☐ 0 ☐ 1 ☐ 2
SECTION SUBTOTAL		<u> </u> / 10

04 Demand generation and channels

A cheap lead that never becomes an opportunity is the most expensive lead you buy.

QUESTION		SCORE
16	Do you know your cost per qualified opportunity by channel? <i>What good looks like:</i> Each channel is judged on the opportunities and pipeline it creates, beyond its cost per lead.	☐ 0 ☐ 1 ☐ 2
17	Is branded search reported separately from non-brand search? <i>What good looks like:</i> Demand you already created does not get credited to campaigns.	☐ 0 ☐ 1 ☐ 2
18	Do trade shows and events have pipeline targets and a follow-up plan? <i>What good looks like:</i> Each event has outreach before it, a follow-up sequence after it, and a measured pipeline result.	☐ 0 ☐ 1 ☐ 2
19	Is your content built around the questions buyers ask during the sales cycle? <i>What good looks like:</i> Sales uses it in deals, and it shows up when buyers search or ask AI tools.	☐ 0 ☐ 1 ☐ 2
20	Has anyone outside your agency reviewed your ad accounts in the last year? <i>What good looks like:</i> An independent review has checked structure, targeting, bidding and wasted spend.	☐ 0 ☐ 1 ☐ 2
SECTION SUBTOTAL		<u> </u> / 10

05 Sales and channel enablement

Marketing that sales can't use is a cost center.

QUESTION		SCORE
21	Is there a standard for how fast sales follows up on marketing leads? <i>What good looks like:</i> A response-time target exists, and someone checks it every week.	☐ 0 ☐ 1 ☐ 2
22	Do reps have current materials for each segment and stage of the sale? <i>What good looks like:</i> Decks, one-pagers, emails and proposal language that reps actually use.	☐ 0 ☐ 1 ☐ 2
23	If you sell through distributors, dealers or retailers, do they get marketing support they can use? <i>What good looks like:</i> A clear partner program with co-marketing materials and training. If you only sell direct, score this 2.	☐ 0 ☐ 1 ☐ 2
24	Does sales tell marketing which leads turned into opportunities and why the rest did not? <i>What good looks like:</i> A monthly review of lead quality changes targeting and spend.	☐ 0 ☐ 1 ☐ 2
25	Is the handoff from marketing to sales written down and followed? <i>What good looks like:</i> Routing rules are clear, and no lead sits unassigned.	☐ 0 ☐ 1 ☐ 2
SECTION SUBTOTAL		<u> </u> / 10

06 Budget, planning and reporting

A B2B budget should start from the pipeline you need and work backward.

QUESTION		SCORE
26	Is the marketing budget built from a pipeline target? <i>What good looks like:</i> It works backward from the revenue goal through win rate and deal size to the pipeline and spend required.	☐ 0 ☐ 1 ☐ 2
27	Do you know your sales cycle length and win rate by segment? <i>What good looks like:</i> Both are used to plan when spend will show up as revenue.	☐ 0 ☐ 1 ☐ 2
28	Does marketing report to leadership in pipeline and revenue terms? <i>What good looks like:</i> Leadership sees pipeline sourced and influenced, cost per opportunity and revenue, beyond clicks and leads.	☐ 0 ☐ 1 ☐ 2
29	Does the company own its CRM, ad accounts, analytics and data? <i>What good looks like:</i> Accounts are in the company's name, with admin access held internally.	☐ 0 ☐ 1 ☐ 2
30	Would your marketing numbers hold up in due diligence or with a lender? <i>What good looks like:</i> An outside analyst could trace reported results back to source data without your help.	☐ 0 ☐ 1 ☐ 2
SECTION SUBTOTAL		<u> </u> / 10

Your total

01	Pipeline tracking and CRM	/ 10
02	Ideal customer and account targeting	/ 10
03	Positioning and proof	/ 10
04	Demand generation and channels	/ 10
05	Sales and channel enablement	/ 10
06	Budget, planning and reporting	/ 10
Total score		/ 60

Solid foundation

48 to 60

Your marketing is building pipeline you can measure. The next gains usually come from sharper targeting, testing and modeling.

Gaps worth closing

30 to 47

The basics are mostly there, but a few weak spots are likely distorting how budget gets set. Fix the lowest-scoring section first.

Not ready to lean on

Under 30

The numbers can't yet support big budget calls or outside scrutiny. Start with pipeline tracking and the sales handoff, because everything else depends on them.

If you want help with the gaps

Paid Media Audit. An independent review of your ad accounts, tracking and spend.	From \$8,000
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Marketing Performance Audit. Tracking, channels, spend and reporting, with a prioritized plan.	From \$15,000
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Audit plus Marketing Mix Model. The audit, plus a model built on your own data.	From \$20,000
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Buyer research. Win and loss interviews, buyer surveys and segmentation.	Quoted on scope
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Fractional CMO. Ongoing strategy, budget and measurement leadership. Starting at \$8,000/month. Most engagements run \$12,000 to \$20,000 a month.	Monthly
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Every engagement is custom quoted based on scope.

About me

I'm Linda Orr, PhD, a fractional CMO and marketing measurement specialist based in Cleveland. I've spent more than 25 years in marketing strategy and analytics.

As Principal Brand Analyst at Upwork, I built the company's first marketing mix model and supported strategy for an \$88M annual marketing budget. My B2B work includes Upwork, PepsiCo, McKesson Foster & Thrive, Midmark Dental and the Government Finance Officers Association. For Midmark, I led more than 25 clinician interviews and a survey of more than 250 respondents behind a 3D imaging launch. For a medical equipment company with roughly \$100M in revenue, I turned 20 years of customer data into a segmentation, account tiers and pricing models.

I work with companies between \$5M and \$500M in revenue, helping leadership teams see which marketing is building pipeline and where the next dollar should go.

Talk through your score

Bring your completed scorecard to a marketing strategy call. I'll tell you which gaps matter most for your business and what it would take to close them.

[Book a marketing strategy call](https://www.orr-consulting.com/bookamarketingstrategycall)

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