

# Sample Collaborative Scorecard

## Upstream / Downstream Marketing, Sales, Customer Success KPIs

## Finance KPIs

Branding	Demand Gen	Pipeline	Stage	Revenue
Website Traffic <b>##</b> ↑xx% from last month	MQLs Generated <b>##</b> ↑xx% from last month	Total Pipeline <b>\$\$</b> ↑xx% from last month	MQL to SQL Velocity <b>##</b> ↓xx% from last month	Bookings vs. Plan <b>\$\$ vs. \$\$</b> ↓xx% from last month
Form Fills/Downloads <b>##</b> ↑xx% from last month	Demos Requested <b>##</b> ↑xx% from last month	Ave Sales Velocity <b>## vs. ##</b> ↑xx% from last month	SQOs vs. Goal <b>\$\$ vs. \$\$</b> ↑xx% from last month	Ave Deal Size <b>##</b> ↑xx% from last quarter
Share of Voice (SOV) <b>%</b> ↑xx% from last quarter	Ave Marketing Velocity <b>## vs. ##</b> ↑xx% from last month	Deals Closed <b>\$\$ vs. \$\$</b> ↑xx% from last month	Deals ≥ Proposal Stage <b>##</b> ↑xx% from last month	Acquisition Cost (CAC) <b>\$\$</b> ↓xx% from last quarter
Net Promoter Score (NPS) <b>##</b> <i>(future quarterly)</i>	Ave CS Score <b>##</b> <i>(future quarterly)</i>	Deals < Proposal Stage <b>\$\$</b> ↑xx% from last month	Ave Implementation <b>## days</b> <i>(future quarterly)</i>	CLTV : CAC <b>\$\$</b> <i>(future quarterly)</i>

# Sample Scorecard Definitions

Generally, Upstream KPIs track brand reputation, trust, and awareness (early stages of the buyer/customer journey) while Downstream KPIs track sales and relationship management (later stages of the buyer/customer journey).

## Branding

- **Website Traffic** measures the total number of visitors to our website (subsequent slide breaks down how sourced: directly - typing the URL into a web browser), organic - via search engines or referral - from backlinks). Importance: increased website traffic can be a reflection of brand recognition/loyalty (direct), our site's authority (referral from backlinks), or our SEO efforts (organic). Source: Google Analytics
- **Form Fills/Downloads** measures the number of forms fills or downloads of gated and longer-form content. Importance: this metric is a good gauge of our content quality and thought leadership. Source: HubSpot
- **Share of Voice (SOV)** measures brand presence or "voice" in the industry as compared to competitors; divide the brand mentions by the total mentions (including those of competitors) and then multiply the result by 100 to get a percentage. Importance: more market share translates into the authority you likely have among users and prospective customers. Formula:  $SoV = (Brand\ Mentions / (Brand\ Mentions + Competitor's\ Mentions)) \times 100$ . Source: Critical Mention (PR agency)
- **Net Promoter Score (NPS)** measures customer loyalty, satisfaction and enthusiasm (e.g., how likely are they to recommend your product/service on a scale of 0-10). Importance: Aggregate NPS scores help businesses improve upon service, customer support, delivery, etc. for increased customer loyalty. Formula: subtract the percentage of detractors (scores of 0-6) from the percentage of promoters (scores of 9-10) based on survey responses ( $NPS = \% \text{ of Promoters} - \% \text{ of Detractors}$ ), resulting in a score that ranges from -100 to 100. Source: NPS survey

## Demand Gen

- **Marketing Qualified Leads (MQLs) Generated** measures the number of leads generated that reached the scoring threshold for MQL.
- **Demos Requested** measures the number of product demos requested and completed by sales. Importance: this metric is a good gauge of future sales success since customers who complete a demo generally result in higher closed-won rates. Source: HubSpot
- **Ave Marketing Velocity** measures the average funnel duration in days against goal (subsequent slides will break down by product, account rep and sales stage). Importance: this is a good indicator of the influence and movement related to marketing efforts. Importance: helpful in determining value of marketing activities. Source: Salesforce
- **Ave CS Score** (future) measures the number and quality of engagements with existing customers based on pre-defined scoring for significant customer-related activities (e.g., QBR attendance, webinar attendance, content download, booth visit, customer dinner, etc.). Importance: it is an indicator of CX and opportunities to potentially improve customer connection points (outreach) and/or customer service. Formula: (see HubSpot/Salesforce scoring criteria). Source: HubSpot/Salesforce

## Pipeline

- **Total Pipeline** measures the dollar value of the total pipeline and the percent change month over month. Importance: a good indicator as to whether the bookings targets are achievable for that time period. Source: Salesforce
- **Ave Sales Velocity** measures the average stage duration in days against goal (subsequent slides will break down by product, account rep and sales stage). Importance: this is a good indicator of the movement or 'close rate' per stage and whether any particular stage needs additional support. Importance: helpful in determining how quickly sales is delivering value. Source: Salesforce
- **Deals Closed** measures the dollar value of all deals closed-won and closed-lost.
- **Deals < Proposal Stage** measures the dollar value of the deals that are less than Proposal Stage in the pipeline. Importance: ensure that each team is focused on activities specific to their primary responsibility to the pipeline (e.g., Prospect, Qualify are marketing led activities with sales, CS support).

## Stage

- **MQL to SQL Velocity** measures how fast marketing qualified leads are moving into the sales cycle.
- **SQOs vs. Goal** measures sales qualified opportunities against sales targets.
- **Deals ≥ Proposal Stage** measures the dollar value of the deals that are equal to or greater than Proposal Stage in the pipeline (Proposal, Negotiate) but not Closed. Importance: ensure that each team is focused on activities specific to their primary responsibility to the pipeline (e.g., Proposal and Negotiate are sales led activities with marketing, CS support).
- **Ave Implementation** measures the number of days it takes to implement a customer. Importance: ensures that sales teams understand/articulate correct timelines upfront and that customer success teams are engaged appropriately by post-sale teams.

## Revenue

- **Bookings vs. Plan** measures the bookings to date versus plan. Importance: this metric is used to understand our sales progress YTD. Source: Salesforce
- **Ave Deal Size** measures the average deal size based on closed-won opportunities. Importance: this metric is used to back into the MQL and SQL numbers needed to achieve sales targets. Source: Salesforce
- **Acquisition Cost (CAC)** measures the cost to acquire a new customer. Importance: it is an indicator of demand and shows the efficiency of sales and marketing spend. Formula:  $CAC = \text{Total Cost of Sales and Marketing} / \text{Total Number of Customers Acquired}$ . Source: Salesforce
- **CLTV : CAC** measures the revenue (or margin which accounts for the support costs) we receive over the lifetime of a customer compared to the cost to acquire that customer, generally at least a 3:1 ratio. Think of it as the return on our customer acquisition investment.