

CRM-Based ICP Scorecard

A practical audit to test whether your CRM data can reveal your best-fit accounts, weak-fit segments, and revenue opportunities.

Use this scorecard to move from ICP guesswork to data-backed account prioritization.

Score your team across data readiness, revenue signals, segmentation, alignment, and actionability. Then use the results to decide whether you are ready for deeper CRM-based ICP analysis.

Time needed	20-30 minutes
Best used by	VP Sales, RevOps, CMO, founder, Head of Sales
What you need	CRM export, pipeline notes, and basic revenue assumptions

How to use this scorecard

Score each statement from 0 to 2. Be honest: the goal is not to look mature, but to find where your ICP process is weak and what to fix next.

Score	Meaning	Use when...
0	No / not available	The data, process, or insight is missing.
1	Partly / inconsistent	You have some data, but it is incomplete or not used consistently.
2	Yes / reliable	The data exists, is trusted, and is used in real decisions.

Total possible score: 50 points

Each section has five questions. Add your score at the end of every section, then calculate your total score on the interpretation page.

1. Audit CRM data	Check whether the fields needed for ICP analysis are present and trustworthy.
2. Score readiness	Use the 0-2 scale to identify gaps in data, process, and alignment.
3. Choose next action	Use the interpretation page to decide whether to clean data, run analysis, or launch ICP-based targeting.

1. Data readiness

Can your CRM export support a reliable ICP analysis?

Question	0	1	2	Notes
Closed-won deals include deal value, close date, and account name.				
Accounts are consistently linked to deals and contacts.				
Industry, company size, and geography are available for most accounts.				
Contact titles or buyer roles are captured in the CRM.				
Won, lost, open, churned, and renewed records are clearly distinguishable.				

Section score	____ / 10
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2. Revenue quality signals

Can you tell which customers create the best economic outcomes?

Question	0	1	2	Notes
You can calculate LTV, ACV, or cumulative revenue at account level.				
You can identify retention, renewal, churn, or customer health signals.				
Expansion or upsell revenue can be connected to the original account.				
Sales cycle length is tracked or can be estimated from CRM dates.				
You can compare high-revenue accounts against low-revenue accounts.				

Section score	____ / 10
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3. ICP clarity and segmentation

Do you know which patterns separate best-fit from weak-fit customers?

Question	0	1	2	Notes
Your team knows which industries generate the strongest revenue quality.				
Your team knows which company-size bands perform best.				
Your team can identify the buyer roles most common in best accounts.				
Your team compares source/channel quality, not only lead volume.				
You can separate high-volume segments from high-value segments.				

Section score	____ / 10
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4. Sales and marketing alignment

Does the ICP influence daily decisions or only exist in a document?

Question	0	1	2	Notes
Sales uses ICP fit when deciding which accounts to prioritize.				
Marketing campaigns are targeted around proven high-quality segments.				
Pipeline reviews include account fit, not only stage and amount.				
Reps can explain why an account is a good or weak fit.				
ICP learnings are reviewed at least quarterly.				

Section score	____ / 10
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5. Actionability and tracking

Can your team turn ICP analysis into clear next steps?

Question	0	1	2	Notes
Accounts can be tiered into best-fit, strong-fit, weak-fit, and at-risk groups.				
Leadership can see which segments deserve more sales and marketing focus.				
At-risk or weak-fit segments are visible before they consume more budget.				
The team can track whether the ICP is changing over time.				
The ICP output is written in plain English and usable by the whole team.				

Section score	____ / 10
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Interpret your score

Add the five section scores to calculate your total readiness score.

Total score

____ / 50

Score range	Readiness level	What it means	Recommended next step
0-20	Not ready	Your CRM data is too incomplete or inconsistent to support reliable ICP analysis.	Clean required fields first: account name, deal value, status, close date, industry, size, and country.
21-34	Basic visibility	You have some useful signals, but the ICP may still be driven by assumptions.	Run a light audit and fix the most important missing fields before scaling campaigns.
35-44	Ready for analysis	You likely have enough data to identify best-fit segments and weak-fit pipeline patterns.	Run a CRM-based ICP analysis and create account tiers for sales and marketing.
45-50	Advanced	Your team has strong CRM data and can use ICP analysis as a recurring revenue decision process.	Track ICP drift, benchmark segments, and review focus areas every month or quarter.

The most useful ICP scorecard conversations happen when the team asks: which accounts should we double down on, which segments are wasting pipeline, and which signals should change our next campaign?

Minimum CRM fields to export

You do not need a perfect CRM to start. But the fields below make ICP analysis more useful and more trustworthy.

Category	Field	Why it matters
Account	Company name, industry, size, country	Reveals which account profiles generate the best revenue quality.
Deal	Deal value, stage/status, close date, source	Connects account fit to real commercial outcomes.
Contact	Job title, role, department, email domain	Shows which buyer personas appear in high-performing accounts.
Revenue	Renewals, expansion, churn, retention notes	Separates high-value customers from accounts that only look good at first sale.
Process	Sales cycle dates, owner, pipeline source	Helps identify segments that close faster and use fewer sales resources.

What to do after the scorecard

If your score is below 35	Prioritize CRM cleanup and field mapping before running deeper analysis.
If your score is 35 or higher	Run ICP Lens on your CRM export to score every account from 0-100 and generate a plain-English ICP statement.
If your score is 45 or higher	Use ICP Lens monthly or quarterly to track ICP drift and detect when your best customer profile changes.

Ready to see your ICP from real CRM data?

Upload a CRM export to ICP Lens and get account scoring, buyer persona insights, deal intelligence, geography patterns, and an executive summary in minutes.

Visit: <https://icplens.com>