

Guide & Workbook

CUSTOMER SCORECARD





Value Proposition Defined

WHY SHOULD I BUY FROM YOU?

A value proposition answers the singular question, why should I buy from you. In a sea of choice that buyer have today, combined with the process of searching and short attention spans, the clearer the statement, the easier it is for someone to take a next click, start a relationship and ultimately make a purchasing decision.

A value proposition is not a tagline or advertising slogan. It is a statement that explains the impact your solution has on the outcomes of someone's problem.

A VALUE PROPOSITION IS NOT DETERMINED, IT'S DISCOVERED

A value proposition is not usually determined; it is discovered. It grows out of the needs of your customers. Which is why the Customer Scorecard exercise is so important you need to ask yourself:

“Why should my ideal customer buy from me versus doing something or choosing something else?”

Then, compare your answer with the claims of your main competitors or buyer options. Refine your value proposition until you can say it in a single, **instantly credible** sentence.

REVIEW & ANALYZE YOUR RECENT SALES DEALS

Review your most recent sales deals over the last 18 months:

What did your best customers know about buying from you that you can communicate to prospective customers? These deals can be a combination of new customers or selling more to existing customers.

Sample Customer Scorecard

CUSTOMER	Ease of Delivery	+ Profitability	+ Referability	- Cost of Sale	TOTAL SCORE
Primus	4	3	5	-3	9
Torini	4	5	3	-5	7
TMG Corp	2	3	3	-2	6
Tantalus	4	4	5	-3	10
ATMA College	5	3	4	-1	11

Instructions:

- 1 In the first column, list some of the customers for whom you have completed and invoiced jobs in the past 12 months. Now rate each project on a scale of 1-5 by four criteria:



EASE OF DELIVERY

How fast and easy was it to complete the deliverable? If very fast and easy give it a score of 5.



PROFITABILITY

Give the highest margin projects a score of 5.



REFERABILITY

Can you use this client as an enthusiastic reference for future projects? If so, score it at 5.



COST OF SALE

Was the sale cycle blissfully short? Were the direct costs of sales minimal? If so, give it a score of -1.

- 2 Add up the four scores for each project. The maximum score is 14.
- 3 Identify the top scoring projects.

YOUR CUSTOMER SCORECARD

CUSTOMER	Ease of Delivery	+ Profitability	+ Referability	- Cost of Sale	TOTAL SCORE

REVIEW YOUR BEST CUSTOMERS TO FIND COMMON ELEMENTS

Sample Best Customer Scorecard

CUSTOMER: Primus

SCORE: 9

Customer Attribute	Buying Trigger	Expectation
Consulting firm	Project way over budget	Projects on-time, on-budget
Toronto-based	Net profit below forecast	No unpleasant surprises
Hourly fee structure		

CUSTOMER: Tantalus

SCORE: 10

Customer Attribute	Buying Trigger	Expectation
Consulting firm	Project way over budget	Projects on-time, on-budget
Toronto-based	Server failure	No in-house maintenance
Fixed fee structure		

CUSTOMER: ATMA College

SCORE: 11

Customer Attribute	Buying Trigger	Expectation
Consulting firm	Invoicing errors	No errors
Toronto-based	Net profit below forecast	No unpleasant surprises
Fixed fee structure		

Instructions:

- 1 List your top scoring customers from the Customer Scorecard.
- 2 Write down the following information for each project:
 - What are the **Customer Attributes** that are relevant to your business (size, location, industry)?
 - What were the **Buying Triggers** (why did they start seeking new solutions in the first place)?
 - What **Expectations** did the customer have about service levels & business performance?
- 3 Identify the common elements.

YOUR BEST CUSTOMER SCORECARD

CUSTOMER: SCORE:

CUSTOMER	Ease of Delivery	- Cost of Sale

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CUSTOMER	Ease of Delivery	- Cost of Sale

CUSTOMER: SCORE:

CUSTOMER	Ease of Delivery	- Cost of Sale

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CORPORATE



PARTNERS AND ISVS



MANUFACTURING

