

MarTech Scorecard

Tool / Platform	Primary Use	Integration Quality (1-5)	Adopotion Rate (1-5)	ROI Contribution (1-5)	Total Score	Action	Notes

Scoring Method
Integration Quality (1–5): How well does this tool share data with other systems?
Adoption Rate (1–5): Are teams actually using it day-to-day?
ROI Contribution (1–5): Does this tool clearly drive revenue efficiency?

Score Interpretation
Total Score = Integration + Adoption + ROI

• **13–15:** Keep and scale
• **9–12:** Optimize or retrain users
• **<9:** Review for elimination

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HubSpot	CRM / Marketing Automation	4	5	4	13	Keep	
Salesforce	CRM / Sales Alignment	5	4	4	13	Keep	
Segment	Data Infrastructure	3	3	4	10	Optimize	Create SOPs and train Super Users
Marketo	Campaign Execution	2	2	3	7	Review	

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Instructions for use

The MarTech Scorecard is designed to help marketing and revenue teams take an objective look at their technology stack.

Instead of chasing “shiny object” tools, this framework shows which platforms are actually driving growth and which are slowing you down.

Step 1 – List All Active Tools

Write down every tool in your current stack (CRM, CDP, automation, data, analytics, ad tech, etc.). Include both widely adopted systems and “hidden” niche tools that teams may have added over time.

Step 2 – Define Primary Use

For each tool, clearly state its primary purpose (e.g., CRM for Sales Alignment, Automation for Email Nurtures, Data Infrastructure). This avoids overlap and helps you catch redundancy.

Step 3 – Score Each Tool

Evaluate tools across three categories (1 = low, 5 = high):

- Integration Quality: How seamlessly does it connect with the rest of your stack?
- Adoption Rate: Are the intended users actually leveraging it? (Or is it shelfware?)
- ROI Contribution: Does the tool demonstrably improve pipeline efficiency, revenue, or cost savings?

Step 4 – Calculate the Total Score

Add the three scores for each tool to get a total out of 15.

Step 5 – Decide on Actions

Use the scoring ranges to guide your next steps:

13–15: Keep and scale 9–12: Optimize (training, better integration, clearer use case) <9: Review for elimination

Step 6 – Review by Clusters

Group tools by function (e.g., Demand Gen, Data, Sales Enablement).

Ask: Does this cluster help us run faster, or does it create silos?

Step 7 – Revisit Quarterly

Stacks evolve fast. Repeat this exercise every 90 days to keep your stack lean, aligned, and ROI-positive.

Pro Tip:

Don’t just evaluate tools in isolation, evaluate them in clusters. A perfectly good tool can fail if it sits in a silo. The scorecard works best when combined with a “stack map” that visualizes how tools pass data between each other.



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