MARKETING BY DEEPAK CONSULTING GROUP

Marketing Segmentation Readiness Scorecard

For Marketing Operations, RevOps, and Demand Gen leaders

Why this scorecard exists

In 2026 buyers expect hyper personalized experiences. Most B2B teams still run spray and pray segmentation: broad firmographic buckets, gut feel tiers, or single field rules that look tidy in a dashboard but rarely drive the pipeline numbers sales actually trusts. The result is wasted spend, product campaign overlap, and segments that quietly go unused.

This scorecard gives you an honest baseline across five areas that separate spray and pray from precision segmentation that supports real personalization and protects multi product revenue. It is written for practitioners who want a clear picture, not a sales pitch.

How to use this scorecard

For each of the 12 statements, give yourself a score of 0, 1, or 2:

- 0 = Not true / We have not started or it is actively broken
- 1 = Partially true / Started but incomplete or inconsistent
- 2 = Fully true / Reliable and documented enough to support precision work

Be honest. An accurate baseline is more valuable than a high score. Maximum total: 24 points.

The five areas covered

1. Data Foundation — Quality, completeness, and multi product readiness of the data that feeds segments
2. Analytical Rigor — Whether you use statistical methods (including R) instead of pure rules and opinion
3. Activation & Delivery — Segments live in HubSpot or Salesforce and are used in real campaigns and reporting
4. Multi Product Handling — Clear rules that prevent product campaigns from overlapping and cannibalizing each other
5. Governance & Iteration — Ownership, measurement, and the ability to improve segments over time

Section 1 · Data Foundation

1. Our contact and company data has low duplicate rates and consistent field definitions across marketing automation and CRM.

Your score: 0 1 2

2. We maintain product interest, use case, and related fields that allow us to segment cleanly when we sell multiple products or packages.

Your score: 0 1 2

3. Key attributes used for segmentation (firmographic, behavioral, intent, and value signals) are populated for the majority of active records.

Your score: 0 1 2

Section 2 · Analytical Rigor

4. We move beyond pure firmographic or single field rules and apply statistical or model based methods (including R or similar) when building or validating segments.

Your score: 0 1 2

5. We test whether segment definitions actually predict conversion or pipeline contribution rather than relying only on coverage or list size.

Your score: 0 1 2

6. Segment logic is documented clearly enough that another practitioner could understand and maintain it without reverse engineering.

Your score: 0 1 2

Section 3 · Activation & Delivery

7. Segment membership is available and kept current inside HubSpot, Salesforce, or the primary tools used by marketing and sales.

Your score: 0 1 2

8. Segments are actively used in campaigns, scoring, routing, or reporting rather than sitting as unused lists.

Your score: 0 1 2

9. Marketing and sales can both explain what a given segment means and what action should follow from membership.

Your score: 0 1 2

Section 4 · Multi Product Handling

10. We have explicit priority or exclusion rules so that product specific campaigns do not collide or cannibalize each other inside the same accounts.

Your score: 0 1 2

11. Multi product accounts can be segmented and treated according to primary interest or opportunity without forcing a single generic path.

Your score: 0 1 2

Section 5 · Governance & Iteration

12. Someone owns the segmentation system, reviews performance periodically, and has a practical process for refreshing or improving definitions over time.

Your score: 0 1 2

Scoring guide

- 0–8 Spray and Pray — Broad buckets dominate. Segments are rarely trusted or used for real decisions.
- 9–15 Emerging — Some structure exists, but activation, multi product rules, or rigor are still inconsistent.
- 16–20 Production Ready — Solid foundation. Segments are used and mostly trusted. Room remains for refinement.
- 21–24 Competitive Advantage — Precision segmentation is operational, measured, and actively improved.

Next step

If you want a clear path from your current score to production ready precision segmentation, or you would like a second set of eyes on the results, book a conversation at marketingbydeepak.com/contact.

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