



SOURCE

ICP + Fit Scorecard

A practical worksheet for evaluating whether an account deserves time, attention, and pursuit

Better sales judgment, applied faster.

Suncoast Spark · Free Resource for B2B Account Executives

ABOUT THIS RESOURCE

What this resource is

Most wasted pipeline time starts with a judgment call that wasn't made carefully enough. An AE adds an account because it looks familiar, because it's a big name, or because someone asked them to. Weeks later, they're deep into a deal with no budget, no urgency, and no real access.

Reduce wasted time

This scorecard gives you a structured way to evaluate fit before you commit meaningful effort. It surfaces the gaps you'd rather know early than discover in month three.

Sharpen your prioritization

Not every account that looks interesting deserves the same attention. This tool helps you distinguish genuine opportunities from accounts that are simply familiar or easy to justify.

Make faster, better decisions

A scored, documented evaluation gives you a defensible basis for how you allocate your time — and a reference point to revisit as the account develops.

CONTEXT

When to use this

Pull out this scorecard whenever you're making a decision about where to direct your time and energy. It works best as a gate — something you complete before a significant commitment of effort, not after.

Before adding new accounts to your active book

Use this before you formally pick up a new account, not after you've already begun outreach and invested time in research.

When prioritizing a territory or named account list

If you've been handed a list of accounts and need to decide where to start, this gives you a consistent evaluation framework across all of them.

When deciding where to spend prospecting time

Prospecting time is finite. This helps you choose accounts with genuine potential over accounts that simply feel familiar or safe.

When comparing multiple accounts for focus

Score two or three accounts side by side to make an explicit, informed choice about where to invest this week or this quarter.

INSTRUCTIONS

How to use this scorecard

This is a four-step process. It should take no more than fifteen minutes per account. If it's taking much longer, you're probably overthinking it — or discovering you don't have enough information to evaluate the account yet.

1

Step 1 — Review the account against the criteria

Work through each of the ten criteria below. Use what you know from research, prior conversations, or internal context. Note where you have evidence and where you're making assumptions.

2

Step 2 — Score each category from 1 to 5

1 = poor fit or unknown. 5 = strong, evidenced fit. Be honest. A score inflated by optimism will cost you time later.

3

Step 3 — Add notes and evidence

Record what you actually know — a specific data point, a conversation, a trigger event. Notes make this useful later and force you to separate evidence from assumption.

4

Step 4 — Total the score and decide

Use the scoring guide below to inform your decision: pursue, monitor, or deprioritize. The score guides — it does not decide for you.

The Scorecard

Account name: _____ Date evaluated: _____ Evaluated by: _____

Criteria	Score (1–5)	Evidence / Notes
Industry fit Does this account operate in an industry where you have a proven track record or a compelling use case?	_____	
Company size fit Does the employee count, revenue range, or organizational complexity match your ICP?	_____	
Geography fit Is this account in a region or market where you can operate and close effectively?	_____	
Business problem alignment Is there a known, specific problem this account faces that your solution directly addresses?	_____	
Urgency / reason to act Is there a credible trigger — strategic, regulatory, competitive, or operational — that creates a reason to move now?	_____	
Existing relationship strength Do you or your company have a meaningful relationship with someone inside this account?	_____	
Access to decision makers Can you realistically reach the people who control the budget and the decision?	_____	
Likelihood of budget Based on what you know, is there plausible budget for a solution at your price point?	_____	
Strategic value Does winning this account deliver value beyond the initial contract — referenceable logo, market foothold, expansion potential?	_____	
ICP match (overall) Stepping back: does this account feel like your strongest customers? Would an experienced seller looking at the evidence see this as a genuinely strong-fit account?	_____	
Total Score	_____ / 50	

SCORING GUIDE

What your score means

Use these ranges as a starting point for your decision — not as a substitute for judgment. A score of 38 with a missing decision maker is a very different situation than a score of 38 with full champion access.

40 – 50

Strong Fit / Pursue Now.

Prioritize now. Commit meaningful prospecting and research effort. This account belongs at the top of your active book.

30 – 39

Good Potential / Work Selectively.

Invest time to close information gaps. Re-score once you have more evidence on the weakest criteria.

20 – 29

Weak or Incomplete Fit / Nurture or Monitor. Only pursue with a strong trigger or an unusually strong relationship. Be honest about whether you're rationalizing interest.

Below 20

Low Priority / Deprioritize. Do not spend major time here. Monitor passively or deprioritize entirely until something material changes.

Scoring note: A score of 1 means the criterion is unknown or clearly not met. A score of 5 means it is strongly evidenced. Defaulting to 3 because you're unsure is a red flag — it usually means you need more research before you can evaluate this account seriously.

DECISION

Recommended action

Based on your total score and your honest read of the evidence, select one of the three actions below. Record your reasoning. This note will be useful when you revisit the account in four to six weeks.

☒ Pursue now

Commit active effort. Add to your pipeline. Begin or accelerate outreach and account planning.

Refer to the 40–50 and 30–39 ranges as a guide. The score informs your judgment — it does not make the decision for you.
Key condition: no critical gaps in access or urgency

☒ Nurture / Monitor

Keep on your radar. Set a specific date to re-evaluate. Define one or two triggers that would move this to active pursuit.

Refer to the 20–29 range as a guide. Identify specific triggers or information gaps that could move this account to active pursuit.
Key condition: gaps that time or events could close

☒ Deprioritize

Remove from active focus. Do not invest further research or outreach time until something fundamental changes.

Refer to the Below 20 range as a guide. Revisit only if something fundamental changes — a new trigger, a new contact, or a shift in the account's situation.
Key condition: multiple structural gaps with no clear path

Why this decision was made

The deciding factors were:

Re-evaluate this account if:

Common mistakes to avoid

These are the evaluation errors that lead experienced sellers to spend time in the wrong places. Read them before you score, not after.

Confusing brand recognition with real fit

A well-known company name is not a signal of opportunity. If you can't articulate a specific problem they have and a specific reason your solution fits, recognition is not fit.

Chasing accounts with no clear problem

If you cannot name the business problem this account is actively experiencing, you do not have a deal — you have a hypothesis. Evaluate it as such.

Overvaluing weak relationships

A LinkedIn connection, a brief conference conversation, or a previous cold email reply is not a relationship. Be honest about what you actually have and what it can realistically open.

Ignoring missing access to decision makers

If you have no path to the person who controls budget and signs contracts, you have an incomplete opportunity. Factor that gap into your score, not your optimism.

Pursuing accounts without a credible "why now"

Urgency is not optional. An account with a perfect ICP match and zero reason to move in the next 90 days will cost you time and drag your pipeline. Name the trigger or acknowledge it doesn't exist yet.



AE ON DEMAND

Want every sales step to live inside your LLM workflow?

AE on Demand helps account executives apply structured sales thinking inside ChatGPT or Claude — for account planning, discovery prep, deal strategy, follow-up, and next-step decisions.

The judgment behind this scorecard — and dozens of tools like it — becomes part of a system you can call on at any point in your sales process, without switching context or starting from scratch.

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