

EPISODE 005 FREEBIE

Signal Trust Readiness Scorecard™

A Six-Part CRM Trust Check + 90-Day Action Plan

Build Signal Trust before asking Sales to act.

NOISY SIGNAL

High priority account
Intent score: 85

TRUSTED SIGNAL

Why this account
Why now
What next

Use this scorecard to focus CRM cleanup on the data that changes revenue decisions.

The Six-Part Signal Trust Check

Score each dimension against the decisions and workflows that matter most.

01

Identity

Right company,
right account record,
right people connected.

02

Context

Why this account matters:
ICP, segment, role,
use case, relationship.

03

Movement

What changed,
when it changed,
and what evidence supports it.

04

Ownership

Who owns the
next move, timing,
and exception path.

05

Signals

What happened,
who did it, when,
and why now.

06

Control

Owners, standards,
checks, exceptions,
and review rhythm.

THE SIGNAL TRUST TEST

Can Sales see why this account, why now, and what next?

If the answer is no, the scorecard shows where trust breaks first.

Definitions: What Each Dimension Means

Use this page as shared language before scoring the worksheet or prioritizing CRM fixes.

01

Identity

Meaning: the right company, account record, and people are connected.

Includes: lead-to-account matching, duplicates, domains, contacts, hierarchies.

Why it matters: prevents fragmented signals, wrong ownership, and incomplete account views.

02

Context

Meaning: the record explains why this account matters.

Includes: ICP fit, segment, use case, industry, size, buying role, relationship.

Why it matters: turns activity from interesting into relevant.

03

Movement

Meaning: the CRM separates activity from real progression.

Includes: stage rules, dates, next steps, aging, and evidence of change.

Why it matters: keeps AI and leadership from seeing movement that is not real.

04

Ownership

Meaning: the system knows who acts next and what happens if rules fail.

Includes: account owner, territory, routing, handoff, SLA, backup, exceptions.

Why it matters: trusted signals still die without a clear owner.

05

Signals

Meaning: the evidence behind the score is visible and credible.

Includes: source, freshness, strength, person/account, activity capture, why-now context.

Why it matters: Sales can see why this account, why now, and what next.

06

Control

Meaning: trust stays protected after the cleanup.

Includes: definitions, owners, clear standards, checks, exceptions, review rhythm.

Why it matters: prevents today's clean data from becoming next quarter's mess.

Shared language reduces cleanup noise.

Score the six parts against a real decision — not against a perfect CRM ideal.

Decision-Grade Trust Test

Before you clean anything, start with the revenue decision the data has to support.

01**The Decision**

What does the team need to decide or prioritize?

02**The Data**

Which records, fields, definitions, and signals does it depend on?

03**The Risk**

What breaks if that data is wrong, stale, or disconnected?

04**The Next Move**

Which data actually changes what someone does next?

THE DISCIPLINE**DO**

- Clean data that changes the next move
- Start with active accounts and live workflows
- Use real exceptions, ignored alerts, and manual fixes
- Define “good enough to act” in plain language

AVOID

- Cleaning every questionable field
- Enriching dormant records first
- Standardizing low-use fields while ownership is broken
- Automating signals Sales already distrusts

THE PRIORITIZATION RULE

If no decision depends on it, it can wait.

Decision-grade trust keeps CRM hygiene focused on revenue outcomes, not endless cleanup.

The 90-Day CRM Trust Playbook

Use three focused phases: map what matters, repair the highest-impact gaps, then keep trust from slipping.

DAYS 1-30

Map + Baseline

- Choose 3-5 revenue decisions or AI-enabled workflows
- Map the records, fields, signal sources, and owners
- Trace ignored alerts, routing exceptions, and manual fixes
- Score Identity, Context, Movement, Ownership, Signals, Control

DAYS 31-60

Repair + Standardize

- Resolve duplicates and active account gaps
- Define minimum trusted rules for critical fields
- Expose source, freshness, evidence, and next action
- Test with Sales: why this account, why now, what next

DAYS 61-90

Keep Trust From Slipping

- Name owners, clear standards, checks, and review rhythm
- Flag exceptions where AI should not guess
- Review ignored or overridden recommendations
- Document territory, workflow, system, and definition changes

By day 90: trust has an owner, a clear standard, a check, and a rhythm.

Copy/Paste AI Thought Partner Prompt

Paste sanitized CRM context. No connector required.

Act as my GTM data-trust strategist. Using the context I provide [paste or attach sanitized CRM context] and the Signal Trust Readiness Scorecard [paste or attach the scorecard here], help me identify which CRM hygiene fixes will most improve decision-grade trust in the next 90 days.

Start by mapping the revenue decisions and AI-enabled workflows that depend on our CRM. Then assess our current state across Identity, Context, Movement, Ownership, Signals, and Control.

For each gap, score decision impact, frequency, cross-functional blast radius, automation risk, effort, and confidence in the diagnosis. Recommend the five highest-priority fixes, explain why each one matters, assign a likely owner, and define the minimum trusted standard and QA check.

For every signal-related fix, specify the context Sales needs to understand: why this account, why now, and what action should happen next. Sequence the work into Days 1-30, Days 31-60, and Days 61-90. Include what we should not clean yet.

Use this context: [business model + ICP], [CRM and connected tools], [critical revenue decisions], [current AI or automation use cases], [known data issues], [buying stages], [lifecycle and routing definitions], [team ownership], [reporting cadence], and [available resources].

Use the attached PDF document to reference definitions for the Six-Part Signal Trust check on page 3.
[reminder to upload this scorecard along with your sanitized CRM context]

Privacy note: paste sanitized examples, field lists, reports, workflow notes, or known issues - not sensitive customer data.

How to Score + Prioritize

The score is not a grade for the whole CRM. It is a trust check for one revenue decision or workflow.

SCORE KEY

1 = blocks action

Missing, conflicting, or not trusted. The team investigates or ignores it.

2 = weak

Inconsistent, incomplete, or often manually corrected before action.

3 = usable with checks

Good enough to start but still needs human review or exception handling.

4 = mostly trusted

Clear enough for most decisions. Exceptions are visible and manageable.

5 = trusted enough to act

Current, owned, explainable, and strong enough for the next move.

Shortcut: 1-3 = investigate; 4-5 = monitor.

TURN SCORES INTO FIXES

1

Score one decision at a time

Pick a real workflow: prioritization, routing, follow-up, forecast, or signal-driven play.

2

Circle every 1-3 score

Write the weakest gap and likely owner in the worksheet. Do not solve yet.

3

Rank the gaps

Favor gaps with high decision impact, frequent use, automation risk, and manageable effort.

4

Choose the top five

Select fixes that will most improve trust in the next 90 days.

5

Name what can wait

Defer low-impact, dormant, low-use, or out-of-scope cleanup.

THE PRIORITIZATION RULE

Top Five Fixes = weak trust + high decision impact + risk of scaling the error.
Do not choose fixes by the lowest score alone.

CRM Hygiene Scorecard Worksheet

Score one revenue decision or signal-driven workflow at a time.

Decision / workflow to support:

Score key: 1 = blocks action • 3 = usable with manual checks • 5 = trusted enough to act

Dimension	Trust score 1 low / 5 high	What to check	Weakest gap / owner
Identity	—	Right company, account record, leads, contacts	
Context	—	ICP, segment, use case, buying role, relevance	
Movement	—	Stage rules, dates, next step, evidence	
Ownership	—	Owner, routing, handoff, SLA, exception path	
Signals	—	Source, freshness, strength, why-now context	
Control	—	Owner, standard, check, exception, review rhythm	

TOP FIVE FIXES Pick fixes from low scores that also carry high decision impact, automation risk, or frequent use.

1.

2.

3.

4.

5.

What **not** to clean yet:

Pass rule: Sales can explain why this account, why now, and what next.