

## Go-to-Market Scorecard and Best Practices: B2B Fintechs

Top Line Focus helps #fintechs grow **FASTER**. Linda Wittich is the owner and operator of Top Line Focus and she created this scorecard. The best practices identified below are based on Top Line Focus clients such as Marstone, WealthForge, QCash Financial and DataLine Data, as well as thirty years of practical experience at fintechs: IBM Watson, Broadridge Financial Solutions, NSCC/DTCC, Doxim and Finn AI.

Criteria	Industry Best Practice
<b>Pipeline Management</b>	
<b>Filling the Funnel</b>	
Social Media	Acct Execs and SLT post often and provide insights
Speaking Engagements	Main stage panels 4x/year
Webinars	Playbook: pre, during and post webinar
Mass Marketing/Drip	Interesting content beyond company. MQL-SAL process
AE/ISR Outreach	Defined sequences, personalized, A/B tests & continuous.
Linkedin Targeting	Post targeted blogs (not just ads) to specific buyer profiles
Advertising	Digital and print advertising in relevant journals
<b>Territory Management</b>	
Clear Assignments	Defined territories with no ambiguity; acct names
Quotas based on TAM	Quotas assigned based on territories: AE knows #deals
Territory Plans	Strategy on how to prioritize accounts in territory
City Tours	Defined strategies to meet prospects F2F
<b>Deal Management</b>	
Strategic Deal Reviews	Exec brainstorming on key deals with structured format
Pipeline Review	Fast cadence with goals for week and steps to close
Forecasting	Deep dive sales cadence for monthly and quarterly
Sales Process/Stages	Well-defined process with activities, collateral and criteria
Relevant Reports	Summary and detailed reports on activities and pipeline
<b>Messaging</b>	
<b>Value Prop</b>	
Buyer Personas	Knows and understands personas on all key buyers
Motivators	Communicates value in terms of buyers' needs and fears
Proof Points	Has quantifiable evidence on value claims
<b>Relevancy</b>	
Understand Competitors	Clear positioning against competitors and status quo
Understand Mindshare	Knows buyers' priorities and what takes precedence
Benefit Statements	Articulates benefits supported by features

Criteria	Industry Best Practice
<p><b>Urgency</b> Reason to Act Now Uses Facts to Encourage Movement</p> <p><b>Obstacles</b> Addresses Needs of Technical Buyers Knows Reason behind Losses/Deferrals Messages Eliminates Obstacles</p>	<p>Communicates the cost of waiting Has quantifiable evidence to support urgency to buyer</p> <p>Engages Compliance, Risk, IT and Security teams Regularly conducts win-loss analyses Proactively addresses likely obstacles without being asked</p>
<b>Client Success</b>	
<p><b>Client Onboarding (COB)</b> Complexity Matrix and Plans Formal Kickoff Success Metrics Reporting/Escalation</p>	<p>Defined process to rank client complexity and strategy Clear agenda, charter, communication plan and escalation Exec commitment to ong term and COB success metrics Adherence to agreed-upon reporting and escalation</p>
<p><b>User Adoption</b> Training Modules Marketing Best Practices Executive Business Reviews/SteerCo</p>	<p>White-glove and self-service Provide client with marketing tools to increase adoption Recurring executive meetings on successes and blockers</p>
<p><b>Service Mindset</b> Client Service and Success Teams Tracking Systems Client Roundtables</p>	<p>Appropriate KPIs differentiating Service from Success items Ability to track and report on service items Process to engage clients with one another</p>
<b>Resources</b>	
<p><b>Sales Enablement</b> Discovery Script Qualification Scorecard Intro Presentation Other Presentations Pricing ROI Calculator 1 Page Slipsheet Testimonial Library Account Lists Case Studies Pre-identified Referenceable clients Standard Contract Easy Access for Account Execs</p>	<p>Includes value prop &amp; collects data to customize intro deck Discovery questions to categorize leads Engaging session that showcases solution, value &amp; urgency Standard decks for deep dive meetings and proposals Clarity and consistency with volume discounts &amp; packages Personalized calculator: TCO, ROI. You &amp; competitors Company &amp; product description that communicates value Collection of 1-liners for outreach programs &amp; stories List of accounts that are in scope and expected targets Multiple case studies that highlight quantifiable success 3+ referenceable clients that will always give raving reviews Standard contract with separate SOW and/or order forms Portal or hyperlinks to current version of materials</p>

Criteria	Industry Best Practice
<b>Marketing Collateral</b>	
Regular & Relevant LinkedIN Posts	LI company posts 2+/day with 50% about industry
Brand Clarity	Clear brand promise on digital properties
Website Clarity	Logical web navigation. Benefits over features
Search Optimization	Searching on likely phrases results in company on 1 <sup>st</sup> page
Customer References on Website	Testimonials on website with logos and easy to find
<b>Client Success Enablement</b>	
Client Onboarding Project Plans	Formal templates for kickoff and reporting
Marketing Materials	Defined templates and strategy for marketing to users
Training Materials	Self-help training beyond FAQs
Chat Capabilities	Real-time support through human or virtual chatbots
Client Reporting / COB and post-live	Focus on success metrics and issue-resolution
<b>Team &amp; Culture</b>	
Startup Nimbleness	Company is in the flow and seamlessly works across silos
Industry SME	Acct Execs and CEO are considered industry experts
Product Knowledge	Acct Execs understand company and can demo product
Defined Sales Process	All Acct Execs adhere to process, clear criteria for stages.
Rapport Building	Acct Execs are skilled at building trust early on
Optimistic	Acct Execs are genuinely thrilled to be at company
Confident in Personal Future	Acct Execs feel valued by exec team; expect to stay 2+yrs
Client Success	Understands buyers, appropriate reporting, conducts EBRs
Personal Organization (Structured)	Acct Execs have daily, wkly, mo process beyond co reqts
Problem Solving	Acct Execs ideate with SLT, product, marketing, etc.
Motivated by Mission	Acct Execs believe in mission and it aligns w their legacy
Believes in Management	Acct Execs believe in CEO and executive team

*I fully recognize that you are unique, and not every best practice is applicable to every firm. Feel free to do a self-assessment and I'm more than happy to give my perspective. If you prefer, I can conduct an independent assessment for you. The Go-to-Market Assessment includes a 5-star weighted-value rating versus your growth stage and ambitions, my perspective of your top business challenges and specific recommendations for you to grow FASTER. Most assessments take 6-8 weeks and require approximately 15 hours of active participation by your team members. At the end of the engagement, you will have a playbook in hand – typically 20+ page of detailed recommendations and an interactive presentation and discussion for me thoroughly explain my rationale.*

*Contact me to schedule a complimentary review of your self-assessment or to learn more about the independent assessment process.*

*Linda*

Linda M. Wittich, Top Line Focus LLC