

Marketing / Go-to-Market Rocks & Scorecard Worksheet

You have the strategy. Now how will you bring it to life? This worksheet helps you translate your V/TO™ into Rock and Scorecard KPIs that align execution efforts to ensure the whole team is moving in the same direction.

Step 1

V/TO™ Alignment Check

1. Review the V/TO™

- Does everyone on the go-to-marketing team understand and agree with each section of the V/TO™?
- Has it been validated in the market/with customers?

V/TO™ Section	Is It clear?	Is it validated?	Is the team aligned?
Target Market	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Three Uniques™	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Proven Process	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Guarantee (if used)	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No

2. Review the 1-year plan and smart goals.

- Is the 1-year plan clear?
- Is everyone aligned on the 1-year plan?
- Do we agree that the SMART goals are the right ones to get us to the 1-year plan?

3. If there are any gaps in understanding and alignment, work through issues around alignment and understanding before proceeding.

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Step 2

Develop Strategic Priorities

Now that you have confirmed the team is aligned, we want to build a cascade from the SMART goals to the marketing rocks.

SMART Goal (from V/TO™)



Strategic Priorities (key focus areas)



Marketing Rock(s) (3–5 quarterly focus initiatives)

The first step of this is to develop strategic priorities.

1. For each goal, discuss:

- **What needs to happen for us to hit this goal? What 1-2 things would have the biggest impact if we get them right this year?**

Focus on big outcomes, such as “we need to add 5 new customers” or “we need to enter this market”, not specific activities.

- **Which customers, products, or markets matter most to get there?**

- **How does the marketing / go-to-market team contribute to this goal?**

Note: Marketing/Go-to-Market may not contribute to every goal. Focus on those where marketing / go-to-marketing makes the most impact.

2. Based on #1, develop no more than 3 Strategic Priorities for Marketing / Go-to-Market teams, such as:

- entering a new growth market or geography
- launching a new product or service
- growing partnerships or channels
- deepening share of wallet
- improving customer retention or NPS
- strengthening brand awareness
- enhancing customer experience/journey
- scaling sales capacity
- building a lead gen engine
- building a pricing discipline
- solidifying or scaling a sales process

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Step 3

Develop Quarterly Rocks

1. **Define what needs to happen in the next quarter to be on target to achieve each Strategic Priority from the previous step.**
 - What has to change in the next 90 days to move us toward this priority?
 - What is realistic to accomplish this quarter?
2. **Prioritize 3-5 of these things that need to happen this quarter. These become Rocks for the team.**
3. **Establish owners and measurable KPIs for each rock.**
 - How will we measure progress week by week? What leading indicators tell us we're on track?
 - Who owns it on the Accountability Chart?

SMART Goal > Rock Cascade Examples

SMART Goal: Grow revenue by 20% this year.

Strategic Priority: Expand into the healthcare segment (new vertical).

Rocks (90-Day):

- Build a list of top 50 healthcare prospects.
- Launch a pilot campaign targeting healthcare decision-makers.

KPI: Generate 10 healthcare discovery calls per week.

SMART Goal: Improve gross margin by 5%.

Strategic Priority: Tighten pricing discipline.

Rocks (90-Day):

- Complete pricing analysis on top 3 products.
- Roll out new standardized pricing guide to sales team.

KPI: 100% of new proposals use updated pricing.

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SMART Goal: Increase customer retention by 10%.

Strategic Priority: Implement customer onboarding program.

Rocks (90-Day):

- Map onboarding process and identify friction points.
- Launch revised onboarding with 3 client pilots.

KPI: 90% onboarding satisfaction rating from pilot clients.

SMART Goal: Enter the Midwest market with \$5M in new sales.

Strategic Priority: Establish regional presence.

Rocks (90-Day):

- Hire regional sales leader.
- Secure first 3 channel partnerships in Midwest.

KPI: 15 qualified Midwest opportunities in pipeline by end of quarter.

Next Steps

Once the Rocks are built:

- Add GTM Rocks to Quarterly plan
- Ensure there are clear KPIs and owners
- Review weekly in L10
- Use IDS if Rocks fall off-track