

System Architecture Scorecard

At Source Trade, we use the System Architecture Scorecard as a structured tool to evaluate how well a client's Salesforce and digital ecosystem is designed to support growth. Built around our Source-MAP Framework, the scorecard measures key dimensions such as data management, integrations, automations, security, governance, and performance.

The purpose is twofold:

- **Clarity** – to provide leadership teams with a transparent view of the current system landscape, including risks, redundancies, and opportunities.
- **Direction** – to prioritize improvements and ensure every architectural decision supports scalability, cost-efficiency, and measurable business outcomes.

By combining technical expertise with business acumen, the scorecard turns architecture into a strategic asset, helping SMEs avoid inflated scopes, reduce tech debt, and future-proof their operations.

DATA & SOURCE INFORMATION

- Do you have a single source of truth for leads, accounts, and opportunities?
- Is customer data synchronized automatically across Salesforce, HubSpot, and other systems?
- Can you trust the accuracy of your reports without manual Excel checks?

PROCESS MAPPING

- Do Sales, Marketing, and Ops follow a documented process for handoffs?
- Are integrations (e.g., HubSpot « Salesforce) mapped clearly, or are they ad-hoc?
- Can you explain in <2 mins how a lead becomes revenue in your system?

AUTOMATIONS

- Are manual tasks (lead routing, follow-ups, alerts) automated where possible?
- Do workflows break often or require frequent admin fixes?
- Do Sales & Marketing teams trust that automation helps rather than hinders?

PERFORMANCE METRICS

- Do you have real-time pipeline visibility (conversion by stage, velocity, source attribution)?
- Can you tie Marketing spend directly to revenue impact?
- Do leadership and frontline teams use the same dashboards for decision-making?