



CUSTOMER FIT SCORING

An operator's guide to ending the sales versus CS argument before it starts

FOR HEADS OF CS, HEADS OF SALES, AND COOS

A WDC FIELD GUIDE

WHY THIS GUIDE EXISTS

The most expensive conversation in healthcare SaaS is the one that happens at month six.

Sales says the customer was a fit. CS says they never were. Both have a version of the truth, neither has the receipts, and the deal is already in a churn pipeline. Nobody learns anything that changes the next deal.

This guide solves that. Not by ending the disagreement, but by moving it three months earlier in the cycle, where it is productive instead of toxic.

You will build four customer personas. You will write a scoring prompt that grades every sales call against them. You will wire it to Granola and HubSpot so it runs without anyone remembering to run it. By the end you will have a fit score on the customer record before the deal closes, visible to both sides of the table.

WHAT THIS GUIDE WILL NOT DO

It will not give you a ready-made ICP. Yours has to be written from your data, your wins, and your losses. Generic personas score nothing.

It will not fix a culture problem with a number. If sales and CS already hate each other, a fit score makes the argument earlier, not nicer.

It will not replace human judgement. The score is a signal, not a verdict. Treat it as one.

BUILD ONCE. RUN DAILY. ARGUE EARLIER.

WHY FIT SCORING FAILS WHEN MOST COMPANIES TRY IT

01

Personas written in marketing language

"Mid-market SaaS leader, 100-500 employees, pain point: scaling." That is a slide. It is not a signal anything can read. The AI will average everyone into a 70.

02

No anti-persona

Most ICPs describe who you want. Few describe who actively damages your business. Without an anti-persona, the score has no way to flag the deal that pays then drags onboarding into the ground.

03

Scoring after the deal closes

A score read in week four of onboarding has no commercial use. Sales has banked the deal. CS has the problem. Both teams have moved on. Score before close, not after.

"THE SCORE IS NOT THE SYSTEM. THE PERSONAS ARE THE SYSTEM. THE SCORE IS THE OUTPUT."

THE FOUR-PERSONA MODEL

Most companies have one persona. The good ones have two. You need four. The space between them is where commercial mistakes live, and where a fit score earns its keep.

ULTIMATE

SCORE 85-100

The customer who would star in your case study. Buys fast, adopts faster, refers without being asked. Builds your business by being yours.

IDEAL

SCORE 65-84

The customer your engine is designed for. Adopts properly with the right onboarding, expands when shown a path. The bulk of healthy revenue.

OK

SCORE 40-64

Bought because someone they trust said to. Pays but does not adopt without active intervention. Profitable only if you have bandwidth to chase. Often not.

ANTI

SCORE 0-39

The customer who costs you more than they pay. Signs to make the salesperson go away, or buys for validation. Drags onboarding. Refers nobody.

THE WRITING RULE

Every persona has four sections, never three: how they talk on a sales call, how they buy, how they behave in week one, and what they say when something goes wrong. The fourth is the one most companies skip. It is the most predictive of all.

ULTIMATE

THE OPERATOR-OWNER

Mid-sized customer with a leader personally engaged in commercial performance. Reads numbers weekly. Knows their key metrics by heart. Sees software as leverage, not overhead.

HOW THEY TALK ON A SALES CALL

Asks about commercial outcomes before features. Wants to know which customers like them have used this and what changed. Challenges the price, then accepts it when the case is clear. Brings their second-in-command to the next call without being prompted.

HOW THEY BUY

Makes a decision inside three calls. Pays without delay. Forwards the contract to their team or accountant the same day.

HOW THEY BEHAVE IN WEEK ONE

Books the onboarding call themselves. Shows up. Brings two team members. Has read the welcome material.

WHAT THEY SAY WHEN SOMETHING GOES WRONG

“What do I need to change at our end?”

IDEAL

THE AMBITIOUS PRINCIPAL

Single-site or small-team customer with growth ambition but no formal operations layer yet. Often a domain expert just starting to think commercially. Has recently hired or is about to.

HOW THEY TALK ON A SALES CALL

Curious. Asks good questions about implementation. Sometimes apologises for not knowing their own numbers. Asks whether their team will use it. Mentions their accountant, advisor, or coach unprompted.

HOW THEY BUY

Two to four calls. Wants a proposal to share with a partner or advisor. Pays inside a fortnight.

HOW THEY BEHAVE IN WEEK ONE

Onboards properly but a key team member misses the first call. The buyer has to chase their own team to engage. Asks the CSM what they should be doing by now.

WHAT THEY SAY WHEN SOMETHING GOES WRONG

“I don’t think the team is using it properly, can you help me get them on board?”

OK

THE RELUCTANT ADOPTER

The buyer who has been told they need this by someone they trust. An accountant, a coach, a peer, a partner. Bought because the case was made by a third party, not because they made it themselves.

HOW THEY TALK ON A SALES CALL

Polite, vague. Asks operational questions (“how long does it take to set up”) more than commercial ones. Defers to “what other customers do.” Says “that sounds great” to most things, which is the warning sign.

HOW THEY BUY

Slowly. Multiple calls. Wants reassurance more than detail. Eventually signs, often after a nudge from the person who recommended it.

HOW THEY BEHAVE IN WEEK ONE

Onboarding call gets rescheduled once. They show up the second time with one team member. Camera off. Promises to share with the team and feed back, then doesn't.

WHAT THEY SAY WHEN SOMETHING GOES WRONG

“We have been really busy, can we pick this up next month?”

ANTI

THE PERMISSION-SEEKER

Buyer looking for external validation that what they already do is fine. Wants the badge of having bought a modern tool without changing anything operationally. Often comfortable, not under commercial pressure.

HOW THEY TALK ON A SALES CALL

Tells you about their business for fifteen minutes before letting you speak. Names competitors they have also looked at. Asks about discounts unprompted. Pushes back on price as a matter of principle, not affordability. Mentions how busy they are repeatedly.

HOW THEY BUY

Either signs quickly to get the salesperson off the call (then doesn't pay on time), or drags it out across five plus calls then ghosts. Either pattern is the same outcome.

HOW THEY BEHAVE IN WEEK ONE

Cancels the onboarding call. Reschedules. Cancels again. Sends an email saying they will "carve out time properly next month."

WHAT THEY SAY WHEN SOMETHING GOES WRONG

"This isn't what I thought I was buying."

THE SCORING PROMPT, READY TO COPY

Paste this as a Project instruction. The four personas you wrote in section two go in the Project knowledge base, not in the prompt itself.

```
You are the Customer Fit Scoring Agent.

Read the transcript and AI summary of the meeting.

Score the customer against the four personas in the project knowledge. Return a FIT SCORE out of 100:
85-100 = Ultimate signals dominant
65-84  = Ideal signals dominant
40-64  = OK signals dominant
0-39   = Anti signals dominant or mixed

Justify the score in three sections:
SIGNALS READ: three strongest signals. Quote where possible.
PERSONA CLOSEST: which persona this customer most resembles.
ONBOARDING RISKS: two most likely failure points in first 90 days.

End with NEXT ACTION, mapped to the band.

Rules:
Score on behaviour and language, not stated intent.
Anti-persona signals weighted heavily. One strong anti-persona signal caps the score at 50.
Be specific. "Asked good questions" is not a signal. Quote the actual line.
If transcript is incomplete, return INSUFFICIENT DATA.

Output format:
CUSTOMER:      [name and company]
CALL TYPE:     [discovery / demo / kickoff / onboarding]
DATE:         [date]
FIT SCORE:     [number] / 100
PERSONA CLOSEST: [name]
SIGNALS READ:
- [signal 1]
- [signal 2]
- [signal 3]
ONBOARDING RISKS:
- [risk 1]
- [risk 2]
NEXT ACTION: [one sentence]
```

WIRING IT TO GRANOLA WITH ROUTINES

Routines in Claude let you trigger an action on a schedule or an event. Set yours to run daily at 18:00.

The routine pulls every Granola meeting from the previous 24 hours where the title contains one of: *discovery, demo, kick off, kickoff, onboarding, closed won*.

For each meeting, Claude reads the AI summary and transcript, runs the scoring prompt, and writes the structured output to a daily summary doc plus the CRM record (next page).

The whole flow takes about ninety seconds per call. Across a sales team running ten to twenty calls a week, that is two and a half hours of qualification analysis done before anyone opens HubSpot in the morning.

ROUTINE TRIGGER (DAILY 18:00)

```
// Daily fit scoring sweep
```

```
Pull Granola meetings from last 24h  
where title contains:  
  discovery, demo, kick off,  
  kickoff, onboarding, closed won
```

```
For each meeting:
```

- Read summary + transcript
- Run scoring prompt
- Write to HubSpot record
- Post to daily summary doc

```
Flag anti-persona scores in red.
```

ONE ROUTINE. RUNS WHILE THE TEAM SLEEPS. ON THE RECORD BEFORE STAND-UP.

THE FIVE CUSTOM PROPERTIES

Create these on the Deal object, not the Contact. The deal is the unit the score belongs to. One contact may run two deals with different fit profiles.

01 · FIT SCORE

Type: Number, 0-100. **Field group:** Qualification. The headline number. Surface this on every deal card view.

02 · PERSONA CLOSEST

Type: Single-select. Options: Ultimate / Ideal / OK / Anti. Filter and report on this in pipeline reviews.

03 · SIGNALS READ

Type: Multi-line text. The three signals from the transcript. This is where the score earns its credibility.

04 · ONBOARDING RISKS

Type: Multi-line text. The two predicted failure points for the first 90 days. This is the field that earns the right to hand off to CS.

05 · NEXT ACTION (FIT)

Type: Single-line text. The one-sentence recommendation. This is what sales sees first in the deal card and what CS sees on handoff.

Watch-out: Do not add the raw transcript or full Claude output to the deal record. It will bloat the record, lag the page, and bury the signal. Keep the five fields lean. The full output lives in the daily summary doc, linked once.

VIEWS, HAND-OFFS, REPORTING

SALES VIEW

PIPELINE BY FIT

Default pipeline view: deals grouped by Persona Closest column. Anti-persona deals sit at the top in red. Forces the rep to address them in pipeline review, not bury them.

CS HAND-OFF VIEW

RISKS FIRST

CS sees Closed Won deals filtered and sorted by Fit Score ascending. Onboarding Risks is the second column. CS reads the risk before the company name. Hand-off is a document, not a chat.

LEADERSHIP VIEW

FIT MIX

Monthly report: closed-won deals by persona mix. Healthy month is 60%+ Ultimate plus Ideal. Anti-persona over 10% of closed is a sales process problem, not a CS one.

THE WORKFLOW THAT MATTERS

When a deal moves to Closed Won, HubSpot triggers a workflow that creates a CS onboarding task with the Onboarding Risks field copied in. The CSM opens the task and the risks are already there. The hand-off conversation is now about how to handle the risks, not whether they exist.

GAINSIGHT NOTE

On Gainsight, push the same five fields to the Company object via HubSpot integration or a webhook. Surface Onboarding Risks on the Customer 360 view as a CTA.

THE FIVE-DEAL BACKTEST

Before the score goes live to the team, run it against five historical deals. Three you know landed well. Two that churned. This is the only thing that tells you whether the personas are calibrated to your actual business or just to a feeling.

DEAL	REAL OUTCOME	SCORE PREDICTS	MATCH?
Win 1 (star customer)	Adopted fast, referred	Should score 85+	Y / N
Win 2 (healthy)	Adopted properly	Should score 65-84	Y / N
Win 3 (slow burn)	Adopted with prodding	Should score 40-64	Y / N
Churn 1 (paid, never used)	Quiet churn	Should score 0-39	Y / N
Churn 2 (dragged onboarding)	Refunded, complained	Should score 0-39	Y / N

If three or more match your gut: the personas are calibrated. Go live with the team. **If two or fewer match:** the personas are wrong, not the AI. Go back to section two and rewrite the persona that produced the worst miss. Re-run.

FIVE FAILURES THAT KILL FIT SCORING

01 – TREATING THE SCORE AS A VERDICT

A 38 does not mean reject. It means slow down and have a different conversation. If reps start refusing to work scored-low deals, the system becomes a blame tool.

Wrong outcome.

02 – NEVER UPDATING THE PERSONAS

Your ICP changes as you scale. Re-read and rewrite the four personas every six months minimum. The personas that won you year one will lose you year three.

03 – SCORE WITHOUT SIGNALS

A score alone is a number to argue with. A score with three quoted signals from the transcript is harder to dispute. Never publish one without the other.

04 – NO OWNER

A head of revenue, head of CS, or COO needs to own the system. Without an owner the routine breaks, the personas drift, and the team stops trusting the output. Name an owner before you go live.

05 – USING IT TO REPLACE THE HAND-OFF CONVERSATION

The score does not replace sales talking to CS. It changes what they talk about. Without the conversation, you have automated a number without changing the operating model. That is faster theatre, not better business.

YOUR CHECKLIST

- Day 1-2** Write your four personas using the four-section template.
- Day 3** Backtest against five historical deals. Adjust personas as needed.
- Day 4** Load personas into the Claude Project. Test the prompt manually on three calls.
- Day 5** Create the five HubSpot custom properties on the Deal object.
- Day 6-7** Build the Routine in Claude. Connect to Granola. Run for two days, scoring to a doc only.
- Day 8** Wire scoring output to HubSpot deal record. Test on three live deals.
- Day 9** Build the three views: Sales (Pipeline by Fit), CS (Risks First), Leadership (Fit Mix).
- Day 10** Build the Closed-Won workflow that creates CS task with Onboarding Risks attached.
- Day 11** Brief sales and CS in the same room. Agree the operating rhythm. Name the owner.
- Day 12** Go live. Review weekly for a month. Adjust personas at month two.

BUILT BY



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