Lead Scoring 101

A DEFINITIVE GUIDE TO GETTING STARTED

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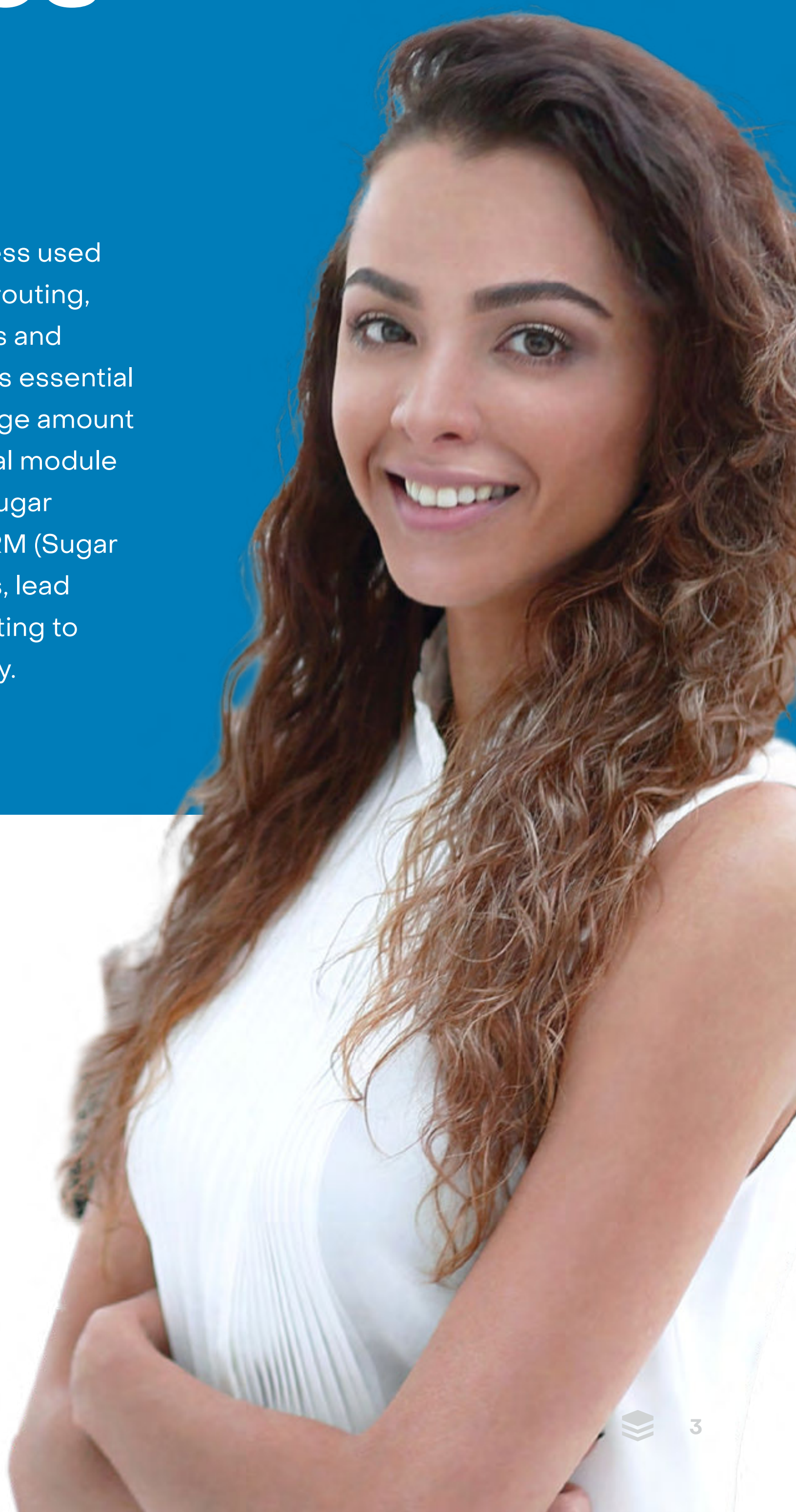
Lead scoring is a technology-powered business process used by B2B companies to automate the ranking, grouping, routing, and tracking of leads that are responding to campaigns and interacting with your corporate website. Lead scoring is essential for companies who are engaging in a moderate to a large amount of online marketing activities. Lead scoring is an integral module within any marketing automation platform—including Sugar Market—and must easily integrate with your internal CRM (Sugar Sell). Designed to ensure a consistent handoff process, lead scoring controls the management of leads from marketing to sales, tracking interaction from prospect to opportunity.



What Scorable Attributes are Captured?

A scorable attribute is one of several categories of data that is captured by your marketing automation platform. The data captured generally falls into three distinct categories:

- Website Activity
- Campaign Responses
- Firmographics/Demographics

Website Copy

Website activity can be broken into general attributes (time on site) and specific characteristics (downloaded particular asset or viewed pricing page). The ability to identify an individual's website activity is based on a first-party cookie placed on their computer via web tracking software provided by the MAP. A person typically agrees to the usage of cookies, even in the post GDPR era, when clicking through a link in an email campaign or visiting a website. Here are some key numbers to help determine lead scoring weightage:

- **Recency** – Date and time of last activity (ex. 30/60/90 days)
- **Visit Depth** – The number of pages viewed in a single session
- **Time on Site** – How long visitor spent on the site in a single session
- **Key Pages** – What pages have they visited
- **Content Interaction** – What content have they used/downloaded

Lead Scoring Setup Tip

Web activity falls into a category of activity known as implicit behavior. When combined with explicit action (ex. form completions), the lead scoring model enables you to understand your prospect's level of interest better.

Campaign Responses

Scoring campaign responses means having the ability to score on an email campaign open/click and a form and/or landing page completion. This explicit activity is more valuable when extended to implicit web activity. Scorable attributes are as follows:

- Opened email
- Clicked through a link in an email
- Completed form
- Registered for event
- Attended event
- Downloaded visible materials from the website

Campaign response scoring may target general attributes (opened any email campaign) or more specific attributes (clicked on this link in this campaign). In the case of forms, you may score on the general attribute (completed any form) or a specific response to a particular question in a special form.

The combination of general and specific response attribute values will increase the accuracy of the scoring model and allow you to improve routing rules.

Lead Scoring Setup Tip

When setting up a scoring model that will look at responses in a web form, you can automatically set up routing rules based on a product-related question. For example – if Sugar Market Salesperson A is responsible for Product B, you can set an alert to go out only to Salesperson A when Product B is selected in that question.

Firmographics

Firmographics will allow you to score and rank leads based on the key information you are looking for in the prequalification of leads. Key firmographics metrics should be gathered from the sales team. They will typically include the following:

- Business Size
- Industry
- Location
- Department
- Role/Title

Lead Scoring Setup Tip

Ask these firmographic questions via the forms on your landing pages, and you use the leads' answers to see if they fit in your ideal customer profile. If you decide to keep some form fields optional, you can increase the lead score of those who decide to complete those fields.

Who Owns the Lead Scoring Model?

The next key step in setting up a lead scoring and routing is to determine who owns this process. Typically, marketing will take full ownership of the lead scoring model since the lead score is the determining factor for whether a lead goes to sales or stays with marketing to continue the nurturing cycle.

In many companies, sales and marketing will collaborate to define the elements of the lead scoring and rank the values of actions and activities. When defining the elements of the lead scoring model, marketing and sales need several meetings to review scorable attributes and adjust the relative values are for the scorable actions.

A good way for marketing to facilitate this initial step is to create a document that includes how actions and attributes will potentially be scored.

☐ **Page Visits > 5**	Lead visits more than five pages in a single website visit
☐ **Title**	Lead had the title of CIO
☐ **Email Campaign**	Lead opens and clicks through
☐ **Recent Web Visit**	Lead is active on the website within the past 30 days

Determine the Value of Scorable Actions

The next step is providing a numerical value to the lead actions. In this meeting, both marketing and sales should have information ready to present:

- Marketing demonstrates the elements, pages, and assets that leads interact with
- Sales provides insight on the value (high, medium, low) of a lead action (ex. a website visit may be only 5 points, but a form fill is 25 points)

Everyone needs to understand the rationale behind the model to begin the routing of leads from marketing to sales. Marketing and sales work together to determine the values of each scorable action and attribute of a lead to determine the best time to transition leads into the CRM.

10 pts	**Page Visits > 5**	Lead visits more than five pages in a single website visit
50 pts	**Title**	Lead had the title of CIO
25 pts	**Email Campaign**	Lead opens and clicks through
15 pts	**Recent Web Visit**	Lead is active on the website within the past 30 days

Creating Scoring Groups

Upon approval by sales and marketing of the actions, attributes, and associated values, it's time to create scoring groups. A scoing group is a set of leads who have achieved the same scored value range. Ranges typically range plus or minus a certain number of points, depending on how you craft the values. Keep the number of groups created to a minimum because too many groups will create a confusing matrix, inhibiting effective managing, testing, and tracking.

Creating Scoring Actions

Once the scoring groups are created, it's time to create the scoring actions and determine the lead routing. Having defined responsibilities is key to making lead routing successful: Once marketing hands off a lead to the sales team, the sales team has the responsibility to follow up.

There should be an established process for lead follow-up between sales and marketing. For example, all hot leads will be directly routed to the sales team by marketing, and a sales team representative must contact the lead within four hours. The remaining leads, warm and cold, are placed in automated nurture campaigns by marketing to increase their lead score. The lead scoring action stage involves a meeting between the two teams to determine the rules of what qualifies a lead in a particular group and what team will take what action when based on the leads when they score into or out of a particular group.

Creating the Feedback Loop

It is critical to have a field in your marketing automation platform and CRM for the lead scoring name. Through this, marketing can track and measure the health of the lead scoring model based upon the lead status disposition changes for hot leads passed to CRM. The report should show how many hot leads were passed to the sales team and what percentage moves forward in the sales cycle. Based on this analysis, sales and marketing can see how the lead scoring profile performs and optimize.

Testing and Adjusting

Run a new lead scoring model for about 90 days to test it. During this, sales and marketing should meet periodically to review the leads and discuss their disposition. This regular communication between teams will help optimization, allowing the organization to make the necessary adjustments to keep the lead scoring model accurate for long-term use.

Before Implementing Lead Scoring Answer these Key Questions

Alongside the actionable learnings within this guide, these questions should empower your team to plan and roll-out a lead scoring model that will dramatically improve the overall lead-to-revenue cycle at your organization.

1. What are the scorable attributes captured?
2. Who owns the lead scoring model?
3. How many scoring groups will be monitored?
4. What are the scoring actions we will take against these groups?
5. How will we validate and measure the scoring model?
6. Should we have one model or multiple models?
7. How should sales be alerted when a lead scores high?
8. Have marketing and sales agreed on all aspects of the model?
9. How should we display scoring data in CRM?
10. Should scores degrade over time due to a lack of activity?

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