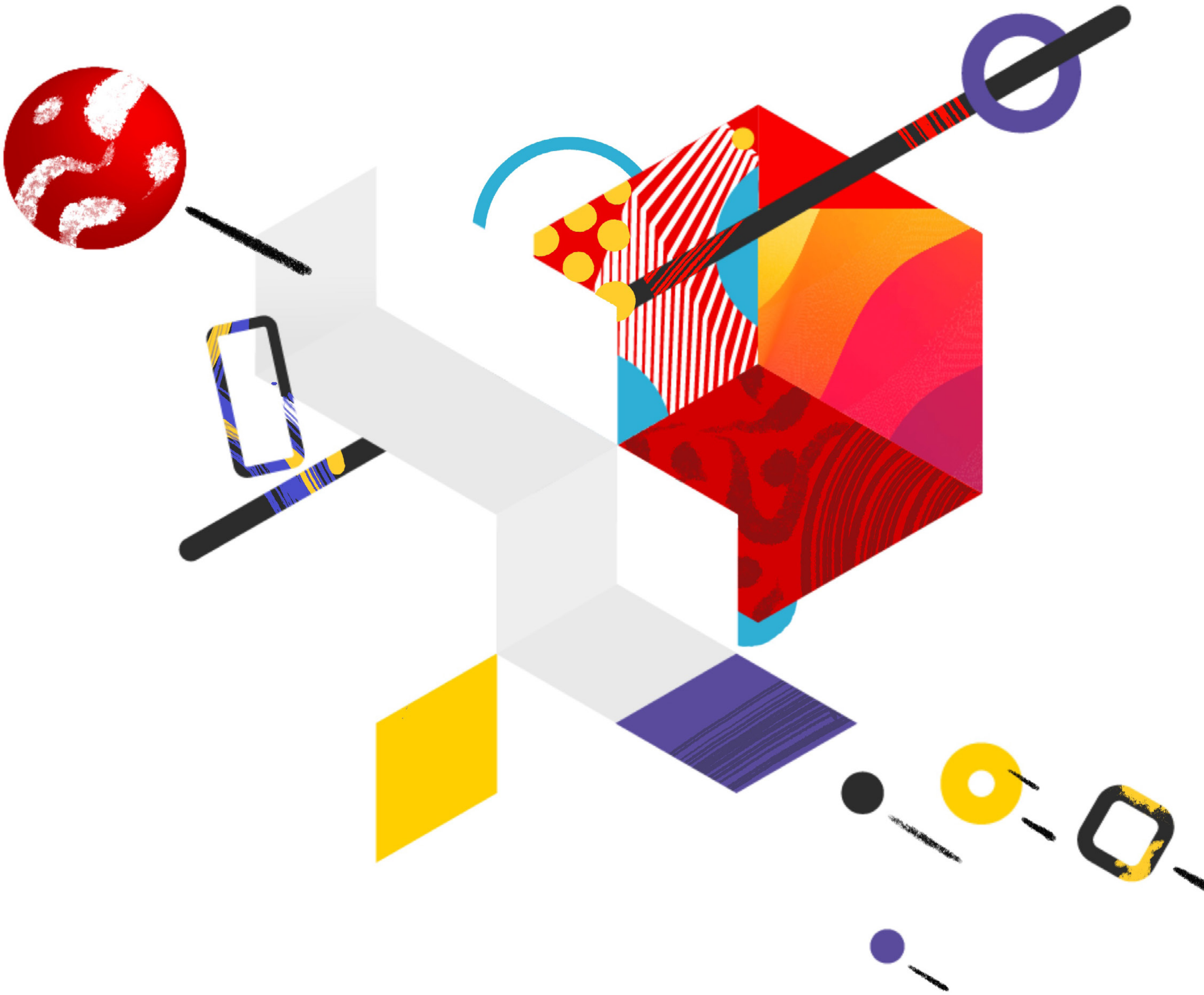
Adobe

THE DEFINITIVE GUIDE TO

Lead Scoring



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Prioritize better leads, produce better sales

Leads are gold for your sales team. And the more qualified they are, the richer your prospects. Lead scoring is a way to identify the most qualified leads, which improves conversion rates, increases revenue, and helps you work more efficiently.

With lead scoring, you can determine a prospect's current level of interest in your business and use that information to deliver more relevant experiences. This speeds up the sales cycle by moving a prospect forward the first time they raise their hand. Lead scoring also ranks the prospect's demographics such as title, industry, and annual company revenue, to make sure they fit your target customer profile.

This guide will help you understand why, how, and when to implement lead scoring. It will also help you improve execution with best practices and easy-to-use worksheets. Whether you're a lead scoring pro or just getting started, these scoring tactics, case studies, and measurement tips will transform your practices.

In this guide we'll cover the following:

The basics in lead scoring, including explicit and implicit methods

How to get started, with real life customer examples

Advanced strategies, including product scoring, account scoring, and score degradation

Lead lifecycle management, to improve sales and marketing alignment

Common lead scoring issues, to save time and prevent inaccurate scores

Content marketing and social media, and their impact on lead scoring

ROI, and how to calculate it for lead scoring

Lead scoring defined and why it's essential

Putting leads on the right track

No sales team has time to pursue every lead equally. Lead scoring can help you rank your leads to determine their sales-readiness. Leads are scored based on the interest they show in your business, their current place in the buying cycle, and their overall company fit. They are then fast-tracked to sales or put on a nurturing track for more development. The best lead scoring systems use demographic and firmographic attributes, such as company size, industry, and job title, as well as behavioral scoring, such as clicks, keywords, and web visits. The goal of lead scoring is to identify which leads are ready to move to sales and which leads require further nurturing.

Lead scoring is not the following:

- A stand-alone marketing process, because sales input is essential for identifying a qualified lead
- Cherry-picking hot leads while ignoring the rest of the database
- A quick-fix or one-size-fits-all approach

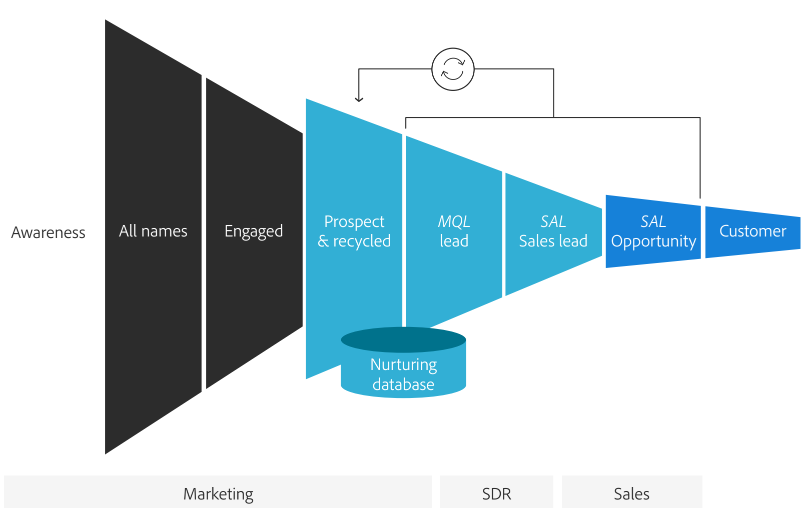
How to make the case for lead scoring

If you're on board, but your executives need convincing, use these benefits to show what lead scoring can do for your business.

Strengthen your revenue cycle

- Identify individuals or organizations who are ready to buy, as well as leads that need ongoing nurturing.
- Drive marketing and sales productivity, and increase revenue faster.

Revenue cycle



Drive return on investment (ROI)

- Increase productivity. A 10 percent increase in lead quality can translate to a 40 percent increase in sales productivity.
- Focus on the right accounts, and the right contacts in those accounts, by engaging only with warm leads.
- Gain insight into whether a deal is likely to close by correlating lead scores with win percentages.

Align sales and marketing

- Improve the sales and marketing relationship by allowing reps to focus on the best leads rather than wasting valuable time on unqualified leads.
- Create a qualified lead definition, simplify follow-up processes, and drive alignment.
- Create a foundation for marketing and sales service-level agreements (SLAs) for lead follow-up.
- Keep leads from accidentally getting dropped.
- Clearly define lead stages and who is responsible when.
- Give sales more context on how a lead has interacted, so they can have more informed conversations.
- Automate processes to minimize blockers and improve efficiency.

What analysts say

Many independent and respected analysts understand the importance of lead scoring. Their reports and interviews highlight the value that a lead scoring process brings to both marketing and sales departments.

“B2B marketers who emphasize lead volume over lead quality reduce sales efficiency, increase campaign costs, and fuel the gap between sales and marketing. To generate qualified demand, marketers need technology and processes that capture lead quality information; validate, score, and classify leads; develop programs to nurture leads that don’t yet warrant sales attention; and define metrics that directly identify marketing’s contribution to the sales pipeline and closed deals.

Laura Ramos, Vice President

Principal Analyst at Forrester Research

“A solid lead scoring approach not only helps to rank prospects against one another, but can smooth the lead flow and serve as the baseline for building a range of business rules that include ownership, role and activities.

SiriusDecisions, What’s the Score?

What companies say

Thousands of companies today are reaping the benefits of lead scoring. We've included case studies on some of them throughout this guide, which will help you develop or improve your lead scoring model.

> "Sophisticated lead scoring rules help focus sales pipeline activity, which drives customer-facing reps to engage in more targeted, relevant, and meaningful conversations, helping us result in a 32 percent increase in qualified lead conversion rates and a 125 percent improvement in average lead conversion time.
>
> **Sally Lowery**
> Senior Manager, Amazon

Lead scoring basics

Explicit and implicit scoring

It's important to consider both explicit and implicit information in your lead scoring. Explicit scoring is based on information the prospect provides or tells you directly, such as age, gender, geography, job title, or company role. Implicit scoring is based on information that you observe or infer about the prospect, such as their online behaviors.

When you merge the two scoring systems together, you build a true picture of the prospect's value to your business and your business's value to them.

How Adobe does explicit and implicit scoring

We use a combination of demographic and lead source information, as well as behavioral scores that include all activity before registration. Demographic attributes can earn a score between zero and 30 points. From there, each different behavior is assigned a point value, such as one point for a webpage visited or email opened to 15 points for searching "Marketo Engage" on Google. Lead scoring can also use negative values for undesirable actions or qualities, such as -50 points for unsubscribes, -10 points for a lead with an entry-level job title, and so on.

If a qualified lead has fewer than 65 points, we call it a prospect and send it for further nurturing. If it has more than 65 points, we call it a lead and send it to telesales for further qualification. Telesales prioritizes qualified, engaged, and educated leads.

Types of lead scoring

	Implicit	Explicit
Behavior	Online body language	Firmographics (Provided company name, title, and email)
Demographics	Inferred geography, data quality factors, etc.	Known geography, data, quality factors, etc. captured from form data or data appending

CASE STUDY

Ketera: Getting to know you by role and company size

The Ketera Network business community brings together over 100,000 buyers and 800,000 suppliers in a freemium online marketplace. They integrate lead scoring with their web content delivery and nurturing, all customized by role and company size. This helps them engage visitors, prioritize leads, and send them to the right sales team. Their key scores include the following:

- Overall lead score
- Recent visits score
- Role scores: buyer and supplier
- Company scores: enterprise/medium/small business

Explicit lead scoring

You can use data that prospects share with you directly for explicit lead scoring. This could come from online forms or your registration process. Demographic attributes, combined with firmographic attributes tell you how well they compare to your ideal customer profile (IDC).

Here are some demographic and firmographic factors to consider:

- Job title/role: Is this prospect likely to resonate with your solution? Will they have access to budget? Are they one of the decision makers? What is their level of seniority?
- Company size: How many employees work at this company? What is the potential deal size with this customer?
- Industry: Does this prospect's company need solutions like yours?
- Company revenue: Do they have the budget for your solution? What level of solution can they afford?
- Location: Is their company global or domestic? What in-person events or trainings can you invite them to? Does your solution comply with their local regulations?

Of course, success with Explicit scoring depends on having well-defined personas for your ICP.

Common point deductions for explicit scoring

With explicit scoring, you might deduct points for prospects who unsubscribe from your emails, have an entry-level job title, or say that they're not looking to adopt a new product or solution in the next year.

Supplementing explicit data with data appending

In some cases, you won't have all the information you need for Explicit scoring. Here, it can be useful to supplement the information in your database. There are many data appending services that can fill in the gaps, with match rates as high as 70 percent, and even better results for public companies.

Another benefit of using these services is that they allow you to shorten your online lead forms and landing pages without lengthening the sales cycle—yet still capture all the information you need to qualify leads. Shortening a form from eight fields to five can increase conversion by 30 percent or more. This alone is often enough to justify the cost of data appending services.

CASE STUDY

LI-COR Biosciences: Understanding engagement improves sales productivity

LI-COR Biosciences is engaged in the design, manufacturing, and sale of high-quality, innovative instruments, software, reagents, and integrated systems for biotechnology and environmental research. They started lead scoring with very basic measures, such as forms filled out, webpages visited, and emails opened. As their sales department's dependence on data scoring has grown, they've built on activity-based scoring, which gives them product scores in eight major solution areas. They rank very specific behaviors to increase the score for each solution area and tie in nurturing for customized communications.

The buying cycle for research equipment averages six to nine months, so the increased visibility into prospect behavior has been critical for the sales team. Using Marketo Engage to see the most rapidly increasing account activity for specific solutions allows them to predict which contacts are actively pursuing a grant and require timely follow-up.

Implicit lead scoring

Implicit lead scoring typically uses behavioral scoring, which tracks your prospect's online behaviors (or online body language) to measure their level of interest in your products or solutions. It can also mean inferring additional information about the prospect based on the quality of the data you have, such as the location of their IP address.

The basics of behavioral scoring

Behavioral scoring identifies a prospect's readiness to buy. Leads who visit webpages, open emails, and respond to offers are showing high interest. Visitors to a product page are exhibiting better buying behavior than visitors to your careers page. You can see more examples of behavioral scoring in the charts below.

Using customer relationship management (CRM) software without marketing automation

Sometimes marketers will try to use lead scoring inside their CRM system without supplemental custom marketing tools like automation. This only works in these cases:

- When you're doing only very basic scoring on demographics
- When a CRM administrator or developer is comfortable customizing the application
- When you're willing to spend extra time on workflows to create and display your score

Type of activity is only one dimension of behavior and doesn't identify your prospect's place in the buying cycle. When you dig deeper into behaviors, like in the chart on the right, you're identifying behavioral importance. For example, you'd score a prospect who clicks a link in an email with a product discount higher than one who clicks on an industry link, as the product link indicates buying behavior.

For more details on implicit scoring, see Getting started with lead scoring (page 15) and Advanced scoring strategies (page 30).

Implicit lead scoring

Activity	Score
Clicks link in email	+3
Completes form	+5
Visits product benefits page	+3
Attends webinar	+10

Behavioral scoring with importance

Activity	Score	Score	Score
Clicks industry-specific link in email	+3	+3	+3
Clicks company-specific link in email	+5	+3	+3
Clicks product-specific link in email	+10	+10	+10

Active versus passive buying behavior

Online behavior is complex and multidimensional, and requires systems to evaluate it. The most important thing to pay attention to is active versus passive buying behavior. Active buying behavior identifies hot leads based on activities showing sales-readiness and current interest. Passive buying behavior, on the other hand, involves lower engagement activity. When you understand both, you can adjust your scoring accordingly.

Imagine two similar prospects with different behaviors. One has downloaded a request for proposal (RFP), watched a demo, and visited the pricing page—all very active buying behaviors. The other prospect has made several repeat visits to the same page over a longer period of time, but shows no other interest in your product or service. While these prospects might both get the same overall engagement, one is active and the other is passive. When creating a lead scoring model, it's important to make sure you are able to adjust your scoring to take these different buying behaviors into account. For example, you should weight lower value/higher funnel content towards passive prospects.

These activities display different levels of sales-readiness and require different follow-up. In this example, you can see that the first lead, Crissy, is showing active buying behavior, whereas the second lead, Jen, is exhibiting passive buying behavior.

It's possible to create a lead scoring system that gives similar scores for active and passive prospects, when the active prospect should really be receiving the higher score. Some solutions to this problem might be looking at the overall score versus the score for just the past three months, using interesting moments to flag big actions as soon as possible, or having a separate score for each product line or solution.

Activity		Score
Lead 1: Customer A - Active		
Today	Download a sample RFP	+4
Yesterday	Watch a demo	+8
5 days ago	Visited a pricing page	+13
10 days ago	Visited trade show booth	+13
		36
Lead 2: Customer B - Passive		
Last week	Download a whitepaper	+3
Last month	Download a whitepaper	+3
2 months	Checked link in email	+2
3 months	Checked link in email	+2
3 months	Checked link in email	+2
3 months	Viewed five webpages	+5
4 months	Download a whitepaper	+3
4 months	Registered for a webinar	+2
4 months	Viewed four pages	+4
5 months	Attended a webinar	+8
6 months	Registered for a webinar	+2
		36

Data quality, data scores, and point deduction

Sometimes, the quality of prospect data tells you how likely a lead is to fit your ideal customer profile. But it's more common to use data quality scoring rules to deduct points so you can focus on prospects with more potential.

Examples of data quality scoring include lowering a prospect's score if the email address comes from a common email domain (gmail.com, yahoo.com, mac.com, hotmail.com, etc.), if the first or last name contains numbers, or if the inferred company name based on the IP address maps to an ISP and not to a corporate domain.

You can also raise or lower a prospect's lead score based on the geographic information you infer from their IP address. This is especially useful if you only operate in certain countries.

Focusing on the data score

A data score is a very simple type of lead scoring that only considers the completeness of 10 to 15 key fields in a CRM or marketing automation system. It's best to use this in conjunction with a more comprehensive lead scoring program. For example, a lead would receive 100 percent if all key information is complete and 50 percent if only half the data is available.

Comprehensive lead scoring can boost the sales process in three main ways:

1. Contacting leads with complete information improves the quality of communication.
2. Marketing efforts can be scaled based on knowing all their contact points (email, address, phone, etc.).
3. The closer a prospect gets to purchase, the more complete their profiles are.

However, the data has one intrinsic flaw: it is easier to find data on public companies than private companies. So you risk leaving your private company scoring data to chance.

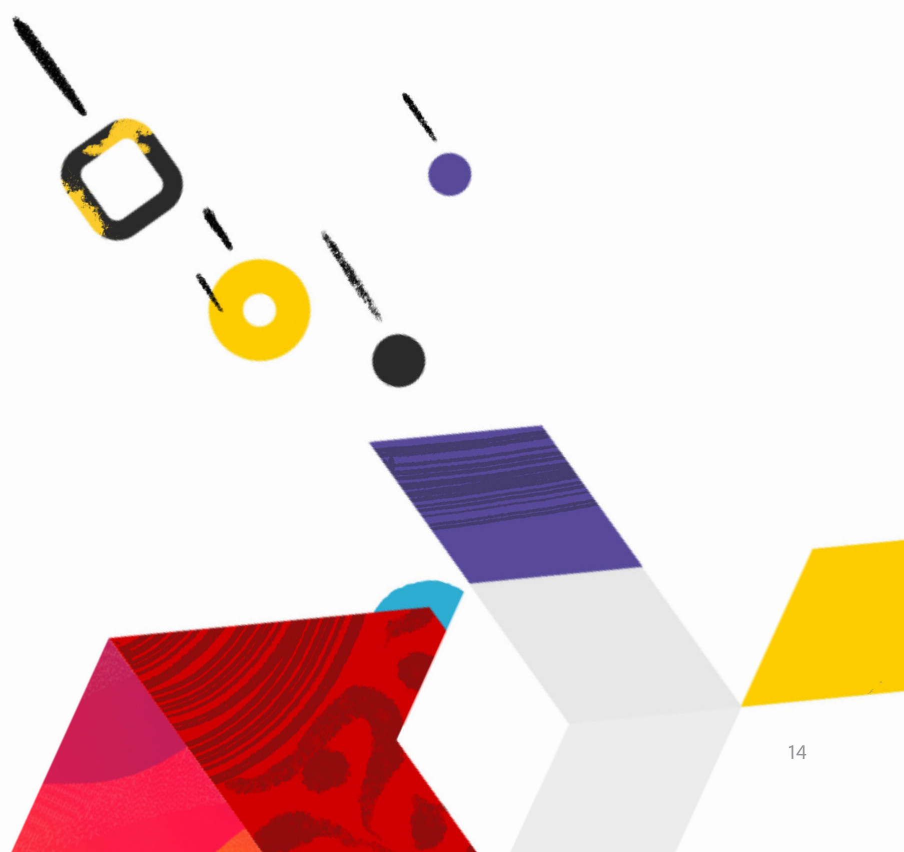
CASE STUDY

Jigsaw: Understand and expand

Jigsaw is a leading provider of business information and data services. They use their own data-appending services to simultaneously keep forms short, feed their lead scoring model, and give sales reps more understanding of the prospect. They append and score the following key demographic criteria:

- Industry
- Job title
- Job role
- Location
- Company size
- Annual revenue
- Phone number

Once a prospect reaches a score threshold based on a combination of those demographics and engagement with Jigsaw (web content, physical event visit, email click-through, etc.), the lead goes to a sales rep for follow-up. The sales rep has the option to expand reach with automated emails to more leads within that account. The scoring model can continue to prioritize demographics and activities for this expanded nurture group, alerting the rep when someone reaches a scoring threshold and should be moved into a more personalized flow.



Getting started with lead scoring

Gather, select, create, and test

Lead scoring is a joint effort by sales and marketing, with each team bringing a valuable perspective. It starts by gathering information about your buyers' interest or sales-readiness. It's helpful to review the following with your sales team:

- **Past deals and current opportunities.** See what they've purchased in the past to identify new opportunities.
- **Online activity log.** See which pages prospects visited and the sources or referring sites.
- **Sales logs.** Find out past interactions with sales, and the activities and campaigns that touched the prospect before the purchase.
- **Feedback from sales.** Talk about issues with leads currently being passed to them (e.g., data that is often missing, trends in sourcing for leads that they disqualify).
- **Average number of marketing touchpoints before leads become marketing qualified leads (MQLs).** Understand the typical journey to know where a lead might be in in the cycle.
- **Marketing assets that lead to MQLs, as well as ones that don't.** Analyze which assets are working best and prioritize those.
- **Average time a lead is in each stage of the sales cycle.** Be sure to look at the time from creation to hitting the score threshold.

You can test your lead scoring by running reports on the leads accepted by sales to see if they mirror your high-quality lead definition. If not, then simply revisit your scoring behaviors and demographics.

Choose your ideal targets

You want to create your ideal target using all relevant information, including demographic and behavioral scoring. So think about explicit and implicit attributes and assign points based on their relevance. Remember that you can have more than one ideal target if you have multiple product lines and solutions, offer different package levels, or are marketing to different industries.

Defining a Marketing Qualified Lead

Align your marketing and sales teams to create an ideal customer profile and define what constitutes a marketing qualified lead (MQL) and a sales qualified lead (SQL). Once you've done that, your sales team can review and approve your information and buyer personas. Focus on the most relevant and common findings to do the following::

- Establish a lead methodology such as using points, letter grades, or the terms "hot," "warm," and "cold."
- Determine a score threshold that will indicate an MQL.
- Assign lead scores according to explicit data, such as demographic and implicit attributes.

When you meet with your sales team, start with simple demographic score ideas—and make sure everyone contributes. The following worksheets will give you a starting point for identifying the demographics and behaviors that count in your business.

Selecting the score criteria

In the following pages, you'll see a list of possible demographic and behavioral scores to help you think of different scoring attributes that may be relevant to your organization. This includes attributes that will have a negative effect on scoring. Make copies of these pages for everyone who is going to help create the lead scoring model, being sure to include team members from both sales and marketing. Have each person check the boxes they think should be included. Then, next to each checked-off score, mark whether the attribute is critical, important, influential, or negative.

Keep in mind that this is only the first iteration. It's a starting point for further honing a lead scoring model, so it doesn't have to be perfect. You might find later that an attribute you thought was important really isn't, or that a certain value has been too heavily weighted. That's okay—it's part of the process.

After your initial lead scoring program has been launched, you'll want to check in with sales to find out if the leads that marketing sends to them are qualified enough to help them close deals more effectively.

Adjust your lead scoring rules until marketing and sales agree about what makes a qualified lead and you're seeing positive results.

Fifty explicit scores to consider

Explicit scoring requires the data in fields to be standardized, as well as a system in place to ensure it remains standardized. For example, if "job title" is an open text field instead of a list to choose from, your database could have more than a thousand unique values in that field. It's impossible to build scoring based on that. The same thing goes for location. If the "state" field doesn't use state abbreviations across the board, your scoring will miss certain data because it's incorrectly formatted.

Potential individual-specific demographic scoring rules

- ☐ Title
- ☐ Role
- ☐ Purchasing authority
- ☐ Number of direct reports
- ☐ Level of manager (to whom do they report?)
- ☐ Years of experience
- ☐ Specialties
- ☐ Type of email used (Gmail, Yahoo, corporate)
- ☐ Years at current position
- ☐ Designations/certifications
- ☐ Honors and awards received
- ☐ Social network participation
- ☐ Social network connections
- ☐ Social network influence
- ☐ Public recommendations
- ☐ Affiliations—groups and associations
- ☐ Career interests
- ☐ Personal interests
- ☐ Degrees received

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Potential company-specific demographic scoring rules

- ☐ Rankings/stock indexes (Fortune 500, Inc 500, etc.)
- ☐ Number of employees
- ☐ Company revenue
- ☐ Revenue growth (growing, declining, etc.)
- ☐ Company financial viability
- ☐ Number of divisions
- ☐ Number of products sold (SKUs)
- ☐ Location
    - ☐ City
    - ☐ State
    - ☐ Zip
    - ☐ Country
    - ☐ Phone area code
    - ☐ Headquarters or satellite
    - ☐ Location of branches
    - ☐ Size of branches
- ☐ Website traffic
- ☐ Website plug-ins
- ☐ Year founded
- ☐ Organizational structure (proprietorship, partnership,
- ☐ corporation)
- ☐ Geographic markets served
- ☐ Competitors
- ☐ Partners
- ☐ Fiscal year end
- ☐ Industry

Relationship scoring rules

- ☐ Account type (potential vs. actual)
  - ☐ Customer
  - ☐ Partner
  - ☐ Competitor
  - ☐ Prospect
  - ☐ Investor
- ☐ Previous relationship
  - ☐ Ex-customer
  - ☐ Lost opportunity
- ☐ Product(s) purchased
- ☐ Complementary technologies used (CRM, ESP, ERP, CMS, MRM, MA)
- ☐ Recycled count
- ☐ Lead source
  - ☐ Website
  - ☐ Sponsorship
  - ☐ Pay-per-click (PPC)
  - ☐ Content syndication
  - ☐ Online ad
- ☐ Budget defined (monthly, quarterly, annually)
- ☐ Time frame (project completion deadline)

Next steps

After you complete the worksheet, see if everyone in sales and marketing choose the same attributes. Discuss any that don't match and then compare them to the reporting and buyer personas you created. Also, see if the demographics match your personas and the data in your reports. If not, discuss them with the group.

Two hundred behavior-based scores to consider (implicit data)

- ☐ Online demo
  - ☐ Open
  - ☐ Opened demos for multiple products
  - ☐ Watched
  - ☐ Watched multiple times
  - ☐ Watched different demos
- ☐ Live demo
  - ☐ Scheduled discovery call
  - ☐ Participated in discovery call
  - ☐ Scheduled initial demo
  - ☐ Participated in initial demo
  - ☐ Scheduled follow-up demo
  - ☐ Participated in follow-up demo
- ☐ Free trial
  - ☐ Downloaded
  - ☐ Participated
- ☐ Free software
  - ☐ Downloaded
  - ☐ Utilized post-download
  - ☐ Purchased or downloaded additional licenses
  - ☐ Multiple licenses being used at one time
- ☐ Application directory (G Suite Marketplace/App exchange)
  - ☐ Integrated
  - ☐ Utilized post-integration
  - ☐ Phone call
  - ☐ Answered
  - ☐ Call lasted more than 2 minutes
  - ☐ Call lasted more than 5 minutes
  - ☐ Call lasted more than 15 minutes
  - ☐ Called in (inbound call)
- ☐ Widget
  - ☐ Interacted with
  - ☐ Downloaded
  - ☐ Hosted a free version on their website
  - ☐ Articles
  - ☐ Viewed
  - ☐ Viewed multiple times
  - ☐ Clicked link inside
  - ☐ Downloaded
- ☐ Presentations
  - ☐ Viewed
  - ☐ Viewed multiple times
  - ☐ Clicked link inside
  - ☐ Downloaded
- ☐ Blog posts
  - ☐ Viewed
  - ☐ Viewed multiple times
  - ☐ Commented
  - ☐ Clicked link inside
  - ☐ Rated
  - ☐ Shared via social s button
- ☐ Press releases
  - ☐ Viewed
  - ☐ Viewed multiple times
  - ☐ Clicked link inside
  - ☐ Downloaded asset promoted inside
- ☐ Books/ebooks
  - ☐ Viewed
  - ☐ Viewed multiple times
  - ☐ Downloaded
  - ☐ Clicked link inside

Two hundred behavior-based scores to consider (implicit data)

- ☐ Product data sheets
  - ☐ Viewed
  - ☐ Viewed multiple times
  - ☐ Downloaded
  - ☐ Clicked link inside
- ☐ Brochures
  - ☐ Viewed
  - ☐ Viewed multiple times
  - ☐ Downloaded
  - ☐ Clicked link inside
- ☐ Manuals
  - ☐ Viewed
  - ☐ Viewed multiple times
  - ☐ Downloaded
  - ☐ Clicked link inside
- ☐ Reference guides
  - ☐ Viewed
  - ☐ Viewed multiple times
  - ☐ Downloaded
  - ☐ Clicked link inside
- ☐ Workbooks
  - ☐ Viewed
  - ☐ Viewed multiple times
  - ☐ Downloaded
  - ☐ Clicked link inside
- ☐ Case studies
  - ☐ Viewed
  - ☐ Viewed multiple times
  - ☐ Downloaded
  - ☐ Clicked link inside
  - ☐ Reached out and did a reference with
- ☐ Emails
  - ☐ Opened
  - ☐ Opened multiple times
  - ☐ Forwarded
  - ☐ Clicked in
  - ☐ Clicked in multiple times
- ☐ RSS/XML feeds
  - ☐ Viewed
  - ☐ Subscribed
  - ☐ Subscribed to multiple
- ☐ Images
  - ☐ Viewed
  - ☐ Viewed multiple times
  - ☐ Downloaded
- ☐ Videos
  - ☐ Viewed
  - ☐ Viewed multiple times
  - ☐ Downloaded
  - ☐ Clicked link inside
- ☐ Recorded webinars/ webcasts
  - ☐ Registered
  - ☐ Viewed
  - ☐ Viewed multiple times
  - ☐ Downloaded
  - ☐ Clicked link inside
- ☐ Live webinars/webcasts
  - ☐ Registered for
  - ☐ Viewed
  - ☐ Commented during
  - ☐ Asked question during
  - ☐ Reviewed follow-up recording
  - ☐ Rated event

Two hundred behavior-based scores to consider (implicit data)

- ☐ Livestreamed events
    - ☐ Registered
    - ☐ Viewed
    - ☐ Commented during
    - ☐ Asked question during
    - ☐ Reviewed follow-up recording
    - ☐ Rated event
- ☐ Surveys
    - ☐ Visited
    - ☐ Completed
    - ☐ Viewed results
    - ☐ Participated in multiple surveys
- ☐ Trade show
    - ☐ Attended
    - ☐ Visited booth
    - ☐ Watched demo
    - ☐ Attended multiple trade shows
- ☐ Road show/ seminar
    - ☐ Registered
    - ☐ Attended
    - ☐ Attended multiple events
- ☐ Microsites
    - ☐ Viewed
    - ☐ Shared via social
- ☐ Webpages
    - ☐ Viewed landing page
    - ☐ Filled out form on landing page
    - ☐ Used instant chat functionality
    - ☐ Used request-a-call-back functionality
    - ☐ Viewed any webpage
    - ☐ Viewed product-specific webpage
    - ☐ Viewed pricing webpage
    - ☐ Viewed customer pages or reviews webpage
    - ☐ Viewed multiple webpages
    - ☐ Viewed multiple webpages in one week
    - ☐ Shared via social sharing
    - ☐ Browser used
- ☐ Search activity
    - ☐ Searched for company name
    - ☐ Searched for product name
    - ☐ Searched other (scored on term)
    - ☐ Search engine used
- ☐ Online courses
    - ☐ Viewed information on
    - ☐ Registered for
    - ☐ Completed
    - ☐ Registered for multiple
    - ☐ Completed multiple
    - ☐ Certifications
    - ☐ Viewed information
    - ☐ Registered
    - ☐ Received certification
    - ☐ Received multiple certifications
    - ☐ Shared multiple best practices

Two hundred behavior-based scores to consider (implicit data)

- ☐ Community
    - ☐ Submitted an idea
    - ☐ Submitted multiple ideas
    - ☐ Read about best practices
    - ☐ Read about ideas
    - ☐ Visited knowledge base
    - ☐ Read product information
    - ☐ Asked a question
    - ☐ Asked multiple questions
    - ☐ Answered a question
    - ☐ Answered multiple questions
    - ☐ Shared a best practice
- ☐ Podcasts
    - ☐ Listened
    - ☐ Listened multiple times
    - ☐ Downloaded
    - ☐ Subscribed
- ☐ Videocasts
    - ☐ Viewed
- ☐ Viewed multiple times
    - ☐ Downloaded
- ☐ Direct mail
    - ☐ Used campaign- specific link or QR code
- ☐ Social media
    - ☐ Clicked link in post
    - ☐ Commented on post
    - ☐ Sent DM

- ☐ **Additional behaviors**
- ☐ ______________________________
- ☐ ______________________________
- ☐ ______________________________
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Negative engagement (implicit data)

While most activities earn positive scores, some do the opposite. Activities such as the following may deserve a negative score:

- Email unsubscribe
- Non-product web visit
    - Careers page
    - Press room
    - Investor page
    - Leadership page
- No website activity for a long period of time
- Change in purchase time frame
- No progression in buying cycle
- Added to do-not-call list
- Spam complaint
- Negative social media comment
- Decline contract/warranty renewal
- No-show for an event/webinar
- Unsubscribe page visit (even if they don't unsubscribe)
- No email opens or clicks in a certain period of time

Never ignore negative scoring attributes when building your model. Use them to your advantage in conjunction with other scoring methods. Also, reset the lead score to zero when a lead is recycled to regain their behavior score to become a qualified lead.

Creating an explicit scoring model

Now that everyone on the team has identified the factors that should affect your lead score, it's time to identify which are the most critical, which are important, and which are influencing. First, compare the suggestions by each of the team members. See if everyone is in agreement. Discuss any differences of opinion so that the best scoring model can be created. Then, make a list of the agreed-upon factors, and assign a score to each.

Scoring demographics example

Attribute	Value	Scores
Critical: (10-15 points)		
Title	Director or VP	+12
Industry	Healthcare, Financial, or High Tech Industry	+10
Purchase authority	Decision Maker	+15
Company revenue	Greater than 500 million	+10
Product	Using competitive solution	+15
Timeline	Identification, less than 3 months	+12
Important: (5-9 points)		
Location	US	+8
Company revenue	100 million to 499 million	+8
Title	Manager	+7
Timeline	Identified, more than 3 months, less than 8 months	+5
Influencing: (1-4 points)		
Location	English speaking	+4
Timeline	Identified, more than 8 months	+3
Title	Analyst, Coordinator, or Specialist	+4
Company revenue	Less than 100 million	+1
Negative:		
Title	Student	-15
Title	Consultant	-5
Industry	Services	-6
Industry	eCommerce	-10
Location	Non english speaking country	-10

Your turn

Now add the demographic attributes that are important to your organization. Mark the appropriate score next to each one.

Your demographics scoring

Attribute	Value	Scores
Critical: (10-15 points)		
Important: (5-9 points)		
Influencing: (1-4 points)		
Negative:		

Creating an implicit scoring model

Here is our sample for scoring behaviors. Note that we identified specific active buying behaviors as critical, and more passive behaviors, like visiting a general webpage, as influencing.

Scoring behaviors example

Attribute	Scores
Critical: (10-15 points)	
Visits pricing pages	+12
Downloads Marketo Engage reviews	+10
Timeline < 3 months	+15
Watches demos	+5 overview demo
	+10 detailed demo
Important: (5-9 points)	
Downloads buyers guides	+8
Downloads data sheets	+8
Searches for "Marketo"	+8
Heavy web activity	+5
Influencing: (1-4 points)	
Watches any webinar	+4
Downloads any white paper	+2
Watches any video	+2
Visits any web page	+1
Negative:	
Unsubscribes from email	-10
No website activity for one month	-5
Added to "Do Not Call" list	-5
Negative social media comment	-4
Visits career page	-2
Visits investor page	-2

Your turn

Write the scoring behaviors for your organization in the space below. Mark the appropriate score next to each attribute.

Your behavior scoring

Attribute	Scores
Critical: (10-15 points)	
Important: (5-9 points)	
Influencing: (1-4 points)	
Negative:	

Weighting behavior versus demographics in your scoring model

After you've scored the demographic and behavioral attributes separately, add them together to create your total lead score. Review the scores to make sure the demographic score makes up no more than half of the total score. This is important, as a lead that does not have any behavior, active or passive, may not be ready for sales interaction.

Focusing on the data score

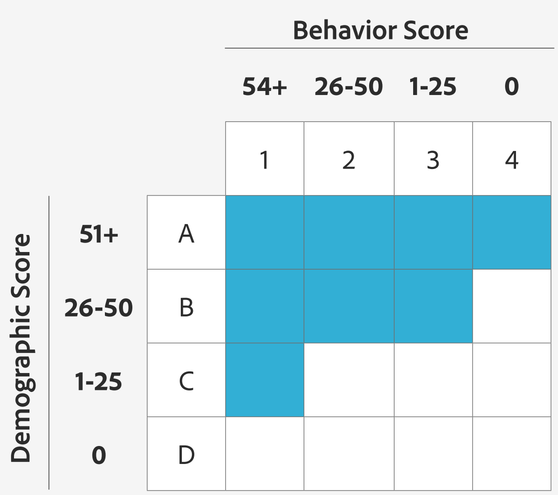
Now that you've created a lead scoring model, you will need to determine the threshold—the point where you hand over a prospect to sales. How is this threshold established? Start by looking at past opportunities, especially through the lens of the new lead scoring model, and score them—how many points did they have when they were handed over to sales? At what point does your typical lead appear sales-ready? Do you only want to pass highly ranked leads over to your reps? Also, look at rejected and disqualified leads. How many points did they have? This will help you identify how low your threshold can be without passing on bad leads.

Review your scores to make sure that those being sent to sales actually meet the minimum score to be sales qualified. This will usually occur when basic demographics are close to target and the lead has participated in one or two critical behaviors. This is very important because if you send too many leads to sales, they may use their time inefficiently, and if you send too few leads, the reps will not be able to sustain their pipeline. Refine the scoring until the appropriate leads are being sent to sales. What happens if a lead doesn't reach the threshold? Put them into a nurturing track until they show sales-readiness with implicit behavior.

Identifying sales-ready leads

It's important for sales and marketing to agree on which leads should be passed from marketing to sales versus which should stay in the nurturing queue. To make sure the two teams are in agreement, it often helps to create a chart. In the example below, you can see how we use demographic and behavior scores determine which leads will be sent to sales.

Determining which leads should go to sales



Pre-deployment testing

It's important to test your scoring system on existing pipeline leads and opportunities before you launch it. Here's how to set up your own test bed:

- Take a random sample of records in the company's CRM system (open opportunities, closed-lost, etc.).
- Examine each contact's demographic characteristics and activity records.
- Assign each record a score based on the new lead scoring criteria.
- Examine the percentage of your sample that would qualify as a sales lead.

If your ideal prospect is a marketing director at a Fortune 500 company who attended a product-specific webinar, then a combination of these kinds of attributes should equal, or exceed, the threshold point barrier to qualify them as sales-ready.

Post-deployment improvements

As soon as you start seeing results, you should be revising your scoring and processes. You must optimize your lead scoring for the changing market dynamics, new products, and so on. Holding regular meetings with marketing and sales to review and update the most accurate scores is a necessity.

- Review scores of won and lost opportunities. See if your top prospects have the top scores.
- Look closely at high scoring leads that didn't turn into opportunities.
- Examine how you can improve scoring to prevent the wrong leads coming to sales with a top priority score from marketing.
- Look at demographic segment scores for region, title, and company to see if scores are improperly adjusted.
- Look at online behaviors to ensure actions taken by your best leads are properly scored.

Regular conversation allows marketing and sales to analyze and adapt the lead scoring system based on what they've learned. It also helps develop a shared idea of what needs to be done for improvement. For more on this, see **The feedback loop on page 33.**

Recycling leads that are not sales-ready

When a sales rep believes a lead isn't sales-ready, determine the best way to send the lead back to marketing for more nurturing.

Advanced scoring strategies

The power of product scoring

So far, we've discussed how to measure a lead's general interest in your company. But sometimes you'll want to score leads for multiple distinct products.

While general behavioral scoring measures interest in your company, product scoring measures interest in what you're actually selling.

For example, Company X sells phones and phone headsets to the North American market. Let's assume they sell one kind of headset and one kind of phone, but have a single customer profile for both products.

If they had a separate lead score for each product, their demand generation team could gain deeper insight. A sales manager could, for example, assign leads to a specific sales rep who could determine with relative certainty whether there is an intent to purchase one of the products. And then follow up with that lead.

Product scoring can become very complex. For example, you could measure interest for each stock keeping unit (SKU) separately—which could result in a lot of scores. If that's important for your company, most sophisticated marketing automation systems still have product scoring that assesses relative interest in a specific product, product line, or SKU.

Think bigger with account-based marketing (ABM)

To capture the attention of potential buyers, you need to consistently deliver memorable and relevant experiences. You'll find the most success when you focus your resources on those who are a good fit for the products and services you sell. And sometimes, it's not an individual. It's a committee or group. With an account-based marketing (ABM) strategy, you can create and deliver a personalized account-based experience (ABX) for key stakeholders, or buying groups, within each account. These personalized marketing touches can reach across all channels to leads and contacts you've identified as "high-priority" accounts.

B2B and B2C companies want to minimize risk when making big purchase decisions. So their buying decisions are becoming much more complex. Plus, the size of a buying committee can vary greatly, depending on the size of the buying organization, and the cost and importance of the purchase. Among tech companies, for example, purchases valued from $100,000 to $1 million are typically made by four to eight people. And the number gets bigger as the dollars go up.

You can expect every individual on a buying committee to score points as normal. In some scenarios, no one will pass the sales-ready threshold, but a snapshot of their combined behavior tells a very different story. A flurry of activity from one company is a solid buying sign.

That's where account scoring comes in. When you group these individuals together as an account, you get a combined picture of the group's activity—and their readiness to buy. You can use a sum, an average, or even a weighted average of individual scores until the group reaches sales-ready status.

Effective account scoring must determine which individuals belong in the same account.
You can group by accounts in your CRM system, or use sophisticated marketing automation systems to discover connections based on IP addresses and company names.

Score degradation

Setting boundaries for your prospects' scores helps manage your marketing pipeline inventory. For example, you may want to score early awareness behavior from 0 to 30, introduce a new range of 31 to 70 as the prospect company starts to explore and commit to change, and assign a score between 71 to 100 as they move to conversion. But you need to offset the natural growth in points that can accumulate from nonactive buying behavior.

Score degradation, often called score decay or negative scoring, reduces overinflated scores or lowers scores as buyer intent changes, such as moving out of active buying mode. You can reduce a score by a certain percentage or by subtracting points.

Another boundary-setting tactic is a score cap. In this scenario, a lead score can't grow above a set point unless it meets certain criteria, like downloading a specific asset or interacting with a sales rep. Simply create a recurring batch campaign that resets lead scores that exceed the maximum back down to your cap.

Don’t forget the feedback loop

Lead scoring methodologies, especially when new, are an imperfect science. You meet with sales, build common definitions, develop a process for automating or making the marketing-to-sales hand-off more efficient, and assign scores based on your understanding of the buying process.

The feedback loop turns guesswork into accurate predictions of sales readiness. Don’t underestimate the value of simple conversations with the sales reps who receive the first qualified leads. Their feedback allows you to measure insight against the scores and interesting CRM information. For example, at Adobe, a discussion with the tele-qualification team led to score reductions for careers page visitors to screen out job applicants.

A structured checkup process is another way to assess your lead scoring campaign, and to examine your complete lead database, segments, and individual leads.

Example: An Adobe feedback loop

Campaign Name	Number of Unique Leads Touched	Number of Unique Leads Touched (Converted to Opportunity)	Campaign Member to Opportunity Conversion Ratio
Visits Revenue Cyle Analytics pricing page	128	45	35.2%
Visits Marketo Sales Insights pricing page	279	95	34.1%
Timeline < 3months	242	71	29.3%
Visits reviews page	953	201	21.1%
Watches Revenue Cycle Analytics demo	748	141	18.9%
Watches sales insight demo	1653	302	18.3%
Downloads lead management datasheet	849	154	18.1%
Downloads *IDV Vendor Spotlight*	352	59	16.8%
Visits free trial page	1763	288	16.3%
Downloads sales insight datasheet	627	102	16.3%
Searches for Marketo Engage	4814	749	15.6%
Timeline 3-6 months	173	26	15.0%
Downloads *Marketing Automation Buyer's Guide...*	407	61	15.0%
Downloads *Raah Guide to Demand Generation Systems*	458	63	13.8%
Downloads *IDC Rev Cycle*	446	59	13.2%
Heavy recent web activity	10435	1193	11.4%
Downloads IDC workbook	952	93	9.8%

Schedule lead scoring checkups

It's important to do a checkup at least quarterly, and make sure that all edits to the lead scoring model are documented. This process ensures everyone is working with the most recent model. A checklist for this process should include the following:

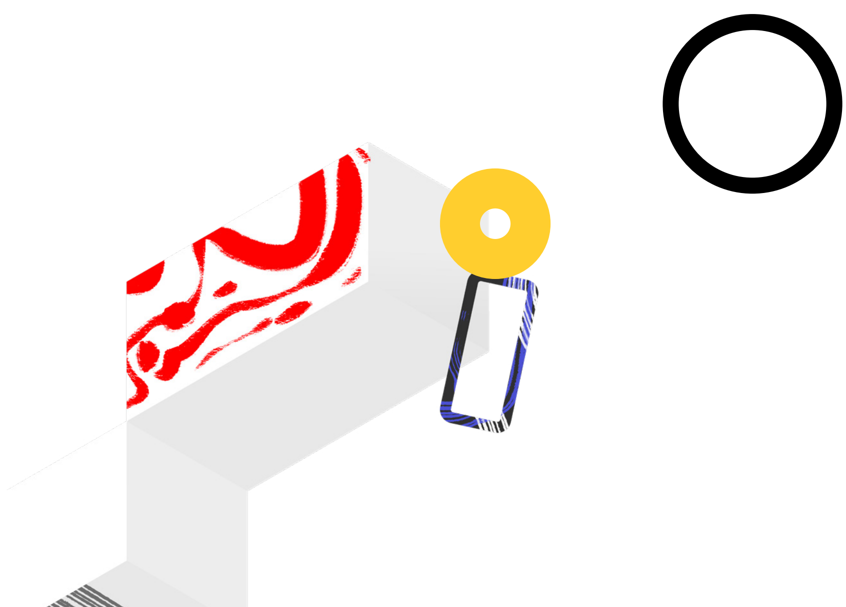
- Take stock of your database scores. How many leads have scores between 0 and 10, 11 and 20, 91 and 100, and so on? Where do the majority of your leads fall? Are there outliers with negative or very low scores that show your database needs to be cleaned up? Do outliers with very large scores indicate scoring methodology errors? Is there a negative scoring system in place?
- Look at new marketing materials and reevaluate your scoring. Remember that significant changes, like a website redesign, will change your marketing collateral ecosystem. Even collateral can impact it.
- Build a list of new opportunities since the last checkup. Which online behaviors seemed to prompt leads to move to the opportunity stage? Which content assets performed best? A marketing automation system that integrates seamlessly with your CRM can deliver this information. (See the next page for more on this).
- Evaluate the accuracy of sales qualification information against self-reported information. Use data from qualified sales leads and actual sales to compare actual versus self-reported BANT (budget, authority, need, timeline) figures.
- Build a list of disqualified sales leads and note which assets they interacted with—then look for meaningful differences with the opportunities list. Consider implementing a "disqualified reason" field to capture trends.
- Understand the relative importance of implicit versus explicit indicators. Marketers often overestimate the importance of latent behaviors such as downloading a new white paper.
- Use your customer list and focus on the latest wins in your target market. Evaluate their demographic scores against the qualification threshold. If they fall below it, then you'll need to adjust both your positive and negative scoring campaigns.
- Assess who in the buying organization was pivotal to the closed deal. A common mistake, outlined by *SiriusDecisions in their paper, When Good Lead Scoring Models Go Bad*, is to overestimate the C-suite's influence on buying decisions.
- Make changes and capture adjustments in the scoring campaigns. With sophisticated marketing automation platforms, you can use catch-up campaigns to retroactively score leads with new methodology and create a potentially massive shift in lead position. After the model has been live for a while, you can look at even deeper trends, like leads who signed up but ended a contract after less than six months, leads who renewed, and leads who took less time or longer than normal to go from a sales-qualified lead to closed-won.

How Adobe does lead scoring checkups

Our demand gen team reviews its own lead scoring rules on a regular basis. In addition to talking with sales, we evaluate our lead scoring campaigns against their specific ability to predict a prospect opportunity. A key metric is the campaign member-to-opportunity conversion ratio. This is critical for deciding which online behaviors are truly indicative of active buying behavior, and which behaviors we scored more heavily after one of our scoring reviews.

Example: New opportunities this quarter—interaction with our online assets

Assets	% of Opportunities
Pricing details page	95
Contact us page	91
Case study + contact us page	89
Pricing page	87
State of the industry (analyst report)	77
Case study	33
Webinar	15
Careers page	12



Lead lifecycle management

Managing leads from demand to deal

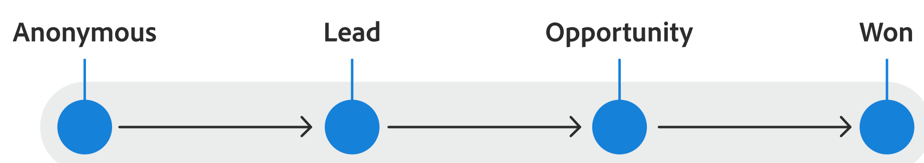
As you begin to develop and improve your lead scoring, it's important to consider your overall revenue cycle for each product line or business unit. Your revenue cycle, traditionally called a funnel, starts with your demand generation programs and ends with a closed deal and new customer. The number of stages between these points depends on your internal marketing and sales processes.

Revenue cycle management

Evaluating how your new lead scoring system fits into your revenue cycle will help you see the big picture. It will also clearly show if your process needs to be more robust to cover additional stages of your revenue cycle.

Start by mapping out your current revenue cycle. Here, anonymous visitors immediately become leads, then opportunities, and ultimately, customers.

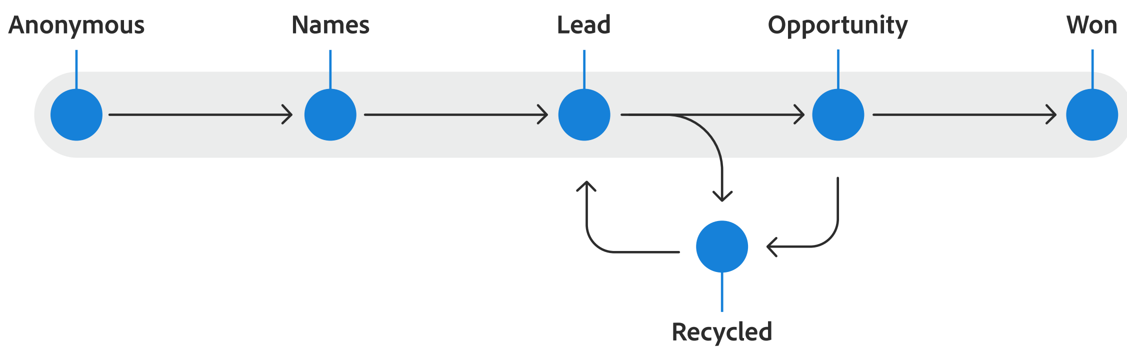
But this simple cycle doesn't identify who is responsible for each stage. It just passes every new unqualified name to sales. And that means you won't know what happened to the leads that didn't become opportunities and to the opportunities you didn't win. Or how many opportunities were lost when they simply dropped out of your process. These leads should stay alive, as they could resurface one day with the budget and executive support they originally lacked.



No lead left behind

The example above ignores an important rule of revenue cycle management: No lead left behind. Leads should never reach a dead end in your revenue cycle. Below is a different example that turns this philosophy into action.

In the new model, a stage titled "names" holds incoming prospects as they enter your revenue cycle. You may only want to push some of them straight to sales. For the rest, you can use tactics like email nurturing to further engage with them and your lead scoring system to decide when they become sales-ready.



Sales-accepted leads

When your sales reps receive a lead, they must decide whether to promote it to an opportunity or recycle it back to marketing. The question is simple but crucial: is the prospect ready to enter a buying cycle? If they are not ready for sales, push the lead into the recycled stage.

Recycled leads

Recycled doesn't mean the lead has reached the end of the road—it represents another holding stage, much like the names stage. As people enter the recycled stage, their lead score can be pushed back down to zero or by an amount determined by how high it was before recycling. At this point, your lead scoring rules kick in again.

If a recycled lead gathers a sufficiently high score, they will be moved back to sales for qualification once again. This example shows just how many roles lead scoring can play throughout your revenue cycle.

CASE STUDY

MarketSource: Aligning sales and marketing in their revenue cycle model

MarketSource is a leading provider of sales and marketing services. They use a revenue cycle model to help their own marketing and sales teams work together for execution and process improvements. The model maps lead stages, velocity, and blockages, with reporting that helps define lead scores for movement between stages.

"The revenue cycle model provides a microscope into my marketing," says John Ledoux, B2B demand generation consultant for Ledoux Consulting who manages the lead-to-revenue process." If we see that leads are getting stuck at the marketing-qualified lead stage, then we need to review our nurturing programs to ensure we are communicating effectively to move prospects to the next stage. Likewise, if we see too many disqualified leads at the sales-accepted lead stage, we are able to adjust our scoring and our process accordingly," he explains.

Service level agreements and lead follow-up

Now that you have your revenue cycle mapped out and a good idea of how to implement your scoring rules, it's time to consider tracking your follow-up with newly scored and prioritized leads. Think about creating time-stamp fields to track how long leads are in each stage. This allows you to identify trends and make sure teams are aligned with service-level agreements (SLAs).

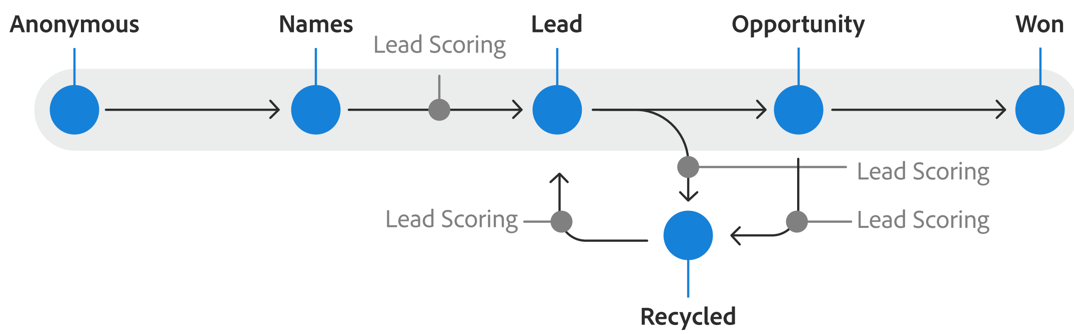
An SLA establishes the time limit for task completion and will be different for every company. The best way to ensure speedy sales follow-up is an up-front consensus between sales and marketing about the SLA. Companies with large call centers may have an SLA measured in minutes, while others may find two weeks perfectly reasonable. It may take a little negotiation, but marketing's incentives should align with those of the sales managers. Prompt follow-up translates into more deals in the pipeline.

There should be an SLA whenever responsibility for a lead transitions to a different team or department. The first SLA focuses on "touching" the lead through phone, email, or face to face. The second SLA looks at when a lead should either become a legitimate or recycled opportunity. If your qualification process has several steps, you may wish to set SLAs for each phase to ensure accurate flow.

Following up on SLAs

You'll also need a plan to ensure everyone is successfully adopting your new process. One common tactic is to raise the visibility of leads that miss their SLAs. Set up email alerts to notify reps and sales managers about missed SLAs and if a hot individual lead is now cooling off. This is a great way to update salespeople who travel or don't log into the CRM system very often.

Prevention is better than a cure. Send a note to the lead owner if they're in danger of missing an SLA completion date. If they do miss it, send an email alert to the rep and their manager. This can be another opportunity to go back to the drawing board on the lifecycle model and see if the SLA is too short or there are ways to help your salespeople.



Common lead scoring issues

Fewer issues, greater success

Logical or structural missteps can sometimes hamper lead scoring models. The process can be difficult and without preparation, can result in less accurate scores. Common pitfalls include using forms to ask for sales qualification information (budget, authority, needs, and timeline), having poor data quality, scoring job titles incorrectly, and pigeonholing yourself into targeting only one industry or company size. Knowing what to avoid when creating your lead scoring model can help you avoid these issues.

Pros and cons of using budget, authority, needs, and timeline

Using these common qualifiers can help you identify prospects who are in buying mode, especially if you're a B2B company. But when we ask for this information via forms, we may receive inaccurate answers.

Some of the reasons prospects can't, or won't, answer these questions accurately include the following:

- They aren't the decision maker and don't know the answer.
- It's too early in the buying process.
- Timelines or budget priorities are changing.
- They don't want to be overwhelmed with sales calls or emails.

Why you shouldn't rely on self-entered information

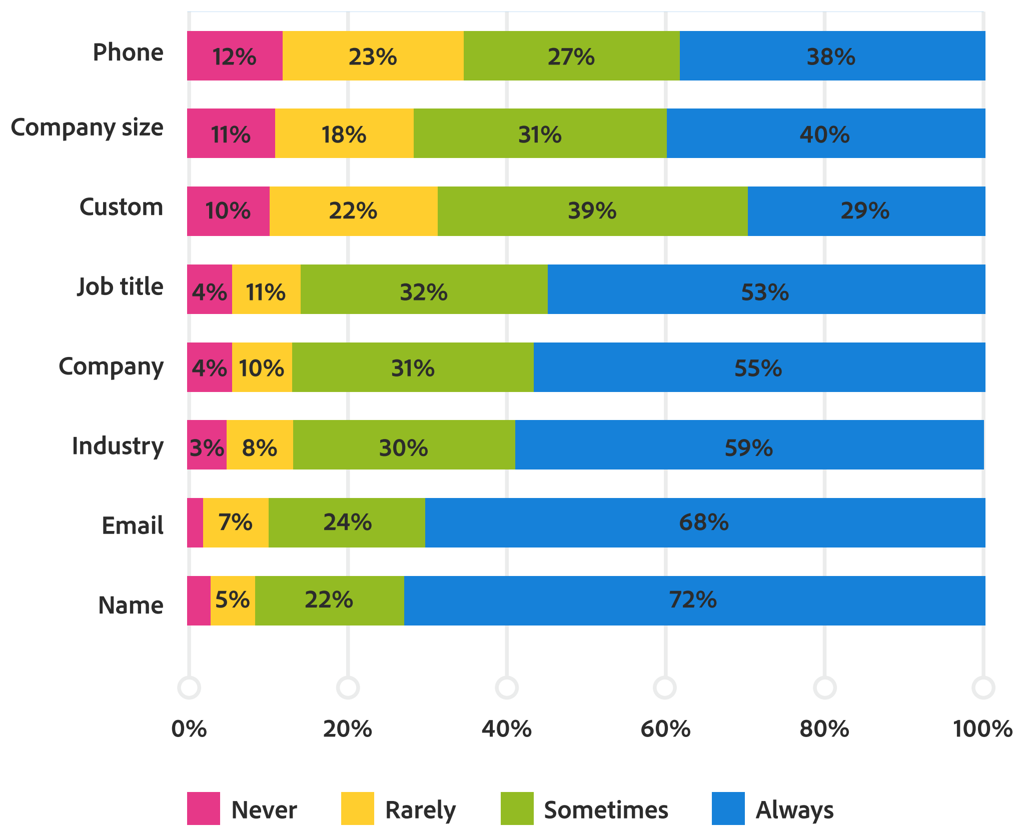
A prospect will often give inaccurate information—even if they have all the right answers.

A study by MarketingSherpa shows that the phone field is the most unreliable source of information. Some prospects don't want to be contacted before they are ready. The best way to know if they're ready is to track their online behavior.

Other issues

- Data-appending apps sometimes have incorrect data.
- If a prospect blocks HTML emails, the tracking pixel doesn't load, and an email open isn't recorded.
- Some email providers now have bots that click all links in an email to check for spam, so you could record false email clicks.
- If a lead fills out a form at work and then browses your website at home on their personal computer, that website data won't be added to their lead record.
- Leads may provide a personal email address.

Do tech buyers provide accurate information during registration?



MarketingSherpa and KnowledgeStorm, Connecting Through Content Phase 111

Incorrect scoring for job titles

According to SiriusDecisions, job titles can be misleading when you're setting up demographic scoring. For instance, the following scoring system might seem to make sense at first: 1 point for interns, 2 points for coordinators, 5 points for managers, 10 points for directors, and 20 points for VPs and CEOs.

In reality, this system is a poor reflection of buying behavior. CEOs of large companies rarely spend time looking at departmental-level products and services, whereas C-level executives of small companies might be involved in purchase decisions. You need a true understanding of who buys your product. If a director is the likely champion and decision maker, then award them top points. If a coordinator is the main researcher, then change your score accordingly. You have to understand the group behavior to score your leads properly.

Bigger isn't always better

SiriusDecisions also points out that when you're not using persona-based scoring, bigger companies with more employees seem like the best targets. But this isn't always the case. You shouldn't assume a few large companies deserve the best scores before you analyze the value potential from your midmarket prospects.

Another common error is grouping data into oversized bands. For example, employees of large companies often get higher scores. A tight band focused on the Fortune 500 might work, but one that lumps in every company with over 1,000 employees is too broad. There are too many companies of that size to allow accurate scoring based on common characteristics.

Content marketing, social media, and lead scoring

Make more of your marketing with content and social scoring

Content marketing and social media are both powerful marketing tools, and lead scoring boosts their power further. It can transform seemingly random actions into defined, sales-ready buying patterns. Let's start with content marketing.

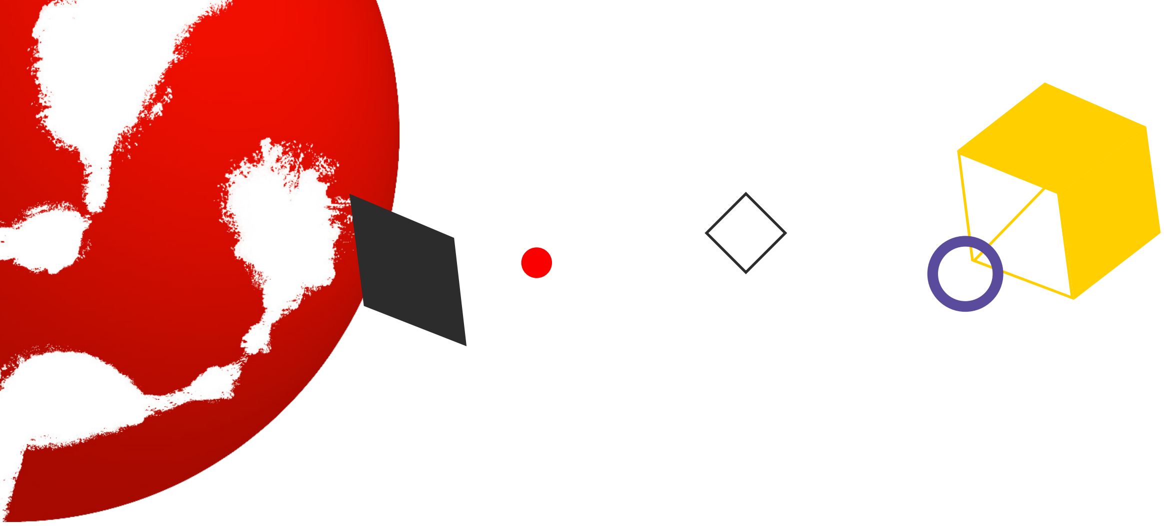
Understanding content marketing

Content marketing is the process of creating valuable and relevant content to attract, acquire, and engage your audience. Content takes many forms, but according to the Content Marketing Institute, it only qualifies as content marketing if it aims to drive profitable customer action.

An effective content marketing strategy helps your brand stand out in a noisy marketplace. It attracts your customers' attention. Fuels engagement. And creates a consistent experience for your audience across every stage of their journey.

Examples of point attribution for content

Content	Less Point Attribution	More Point Attribution
Webinar	Registering for the webinar	Watching the webinar
Demo	Viewing the demo webpage	Watching the demo
Ebook	Downloading the ebook	Clicking a link form inside the ebook
Email	Opening the email	Forwarding the email to a friend
Widget	Interacting with the widget	Putting the widget on the prospect's website



Capitalizing on content scoring

Most marketers who invest time and resources into content marketing see a range of benefits that affect lead scoring, including:

- Risk Mitigation: Develop trust with information that helps buyers make good decisions and reduces both organizational and personal risk.
- Lead Generation: Drive traffic to your website, capture leads through forms, and use offline content like trade show collateral and direct mail pieces to generate leads.
- Lead Nurturing: Develop leads with educational and informative content as part of a robust lead nurturing program.

Content you can use in lead scoring

Scoring content shouldn't be restricted to a particular visit. It should also focus on how prospects consume the content and how much effort it requires. This provides a valuable way to understand buyer behavior. Here are some examples of content that leads consume:

- Articles
- Blog posts
- Press releases
- Product data sheets
- Books and eBooks
- Brochures and manuals
- Reference guides
- Case studies
- Resource libraries
- Email
- RSS and XML feeds
- Direct mail pieces
- Images
- Videos
- Information guides
- Webinars and webcasts
- White papers
- Online courses
- Widgets
- Podcasts and videocasts
- Workbooks
- Webpages and microsites
- Trade show collateral

Scoring social media, the social side of lead scoring

Social media should play an important role in your lead scoring process. These outside interactions are often valid signs of sales-ready behavior. For example, if a prospect tweets that they are looking for opinions on your product, the activity should trigger an increase in lead score and create a sales-ready lead alert. If a prospect starts following key influencers in your space, it could be a sign that they are moving closer to a buying phase, which should increase their score.

In order to score social media interactions the right way, you should do the following:

- Use a social media monitoring tool. There are free tools like Salesforce for Twitter, or more comprehensive options like Brandwatch, Visible Technologies, or Radian6. Another option is manual data capture for entry into your marketing automation system.
- Pass data from the monitoring tool into the CRM or marketing automation system.
- Understand how interactions on social media affect the buying process and customer lifecycle.

How social media monitoring tools work

Social media monitoring tools, like Visible Technologies or Radian6, visit websites and capture information on their pages using tools called spiders or bots. Rather than capturing search results like they do for search engines like Google, they compile information about online conversations to provide analyses and reports by product or brand.

Once you've captured social interactions, you can score against them. Like other behaviors, social media interactions shouldn't be scored equally. Someone who tweets on industry issues doesn't compare to someone who posts on your Facebook fan page that they're about to buy your product.

CASE STUDY

The Pedowitz Group: Going social with lead scoring

The Pedowitz Group (TPG) is a leading demand generation agency. They complement their marketing automation lead scoring with social media scores, keyword search scores, and key digital behavior scores. TPG includes these scores:

- Twitter score
- Facebook score
- Sweet score (their own social media scoring product)
- Hive score (a social activity score based on a group of keywords)

TPG also scores specific high-value webpages, content visits, and social media activity. A unique aspect to their scoring strategy is scoring digital activity at individual, or prospect, opportunity microsites to accelerate the sales cycle.

By integrating all types of digital behavior, TPG is able to help the sales team leverage the most accurate behavioral scoring model possible and provide an additional focus on revenue.

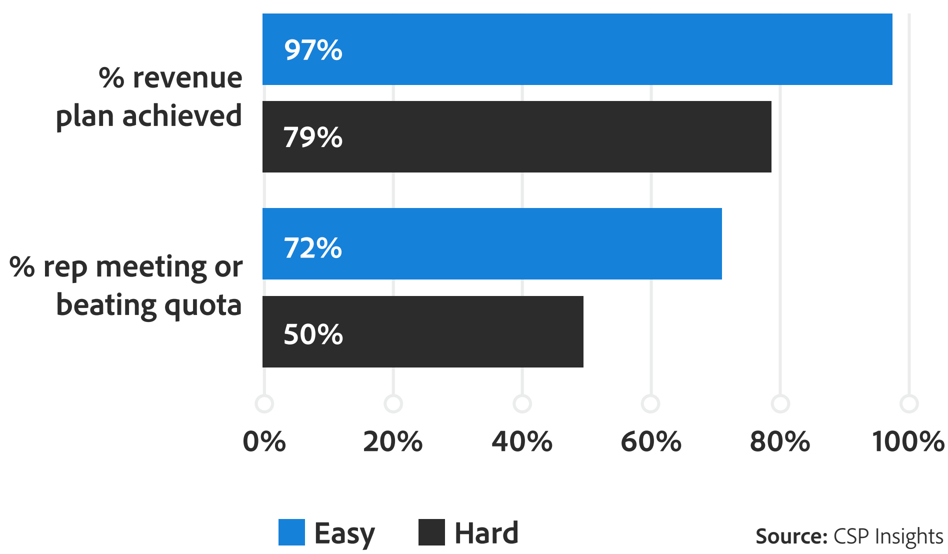
The ROI of lead scoring

Better leads, better returns

The true value of lead scoring comes from focusing on the right leads at the right time. It also helps you achieve financial efficiencies. CSO Insights data shows that sales teams who prioritize sales efforts are 18 percent more likely to achieve revenue plans and 22 percent more likely to meet or beat their quota.

That's because lead scoring typically increases sales productivity and the number of leads converted to opportunities. It also decreases sales cycle times for qualified leads.

How easy is it to get access to information about prioritizing sales efforts?



Convert more leads to opportunities

Lead scoring ensures that reps work more efficiently by focusing on the leads that are likely to buy. This allows them to close more deals and produce more revenue. It's important to capture the before-and-after metrics to compare results and show value.

Here's an example of how you could measure lead scoring results:

Example

Metric	6 months before	6 months after
Leads sent to sales	1,000	600
Percent of leads accepted by sales	25%	40%
Opportunity win rate	20%	40%
Days from MQL to opportunity won	80 Days	60 Days
Revenue per deal	$50,000	$62,000
Total revenue	**$25M**	**$32M**

Your turn

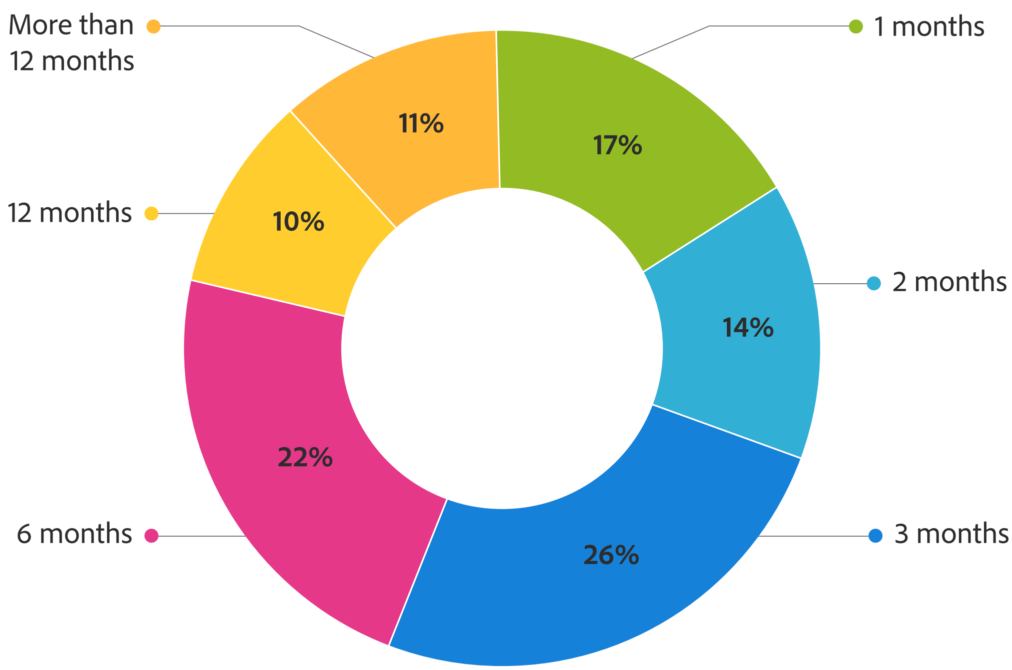
Metric	6 months before	6 months after
Total revenue		

See shorter sales cycles

Typical sales cycles are measured from the time an opportunity enters into the CRM or marketing automation system through purchase. The sales cycle starts when a lead becomes sales-ready and ends when they purchase your product. To find the length of your sales cycle, take the average number of days for this to happen over a set period, removing any potential outliers that could skew the data set. You should find that lead scoring shortens your cycle time.

To understand any improvements you see, be sure to capture the typical sales cycle time before and after lead scoring. Revisit this metric every time you optimize your lead scoring model and measure the ongoing impact.

Lead generation to sales conversion



MarketingSherpa, The Length of B2B Sales Cycles from Lead Generation to Sales Conversion

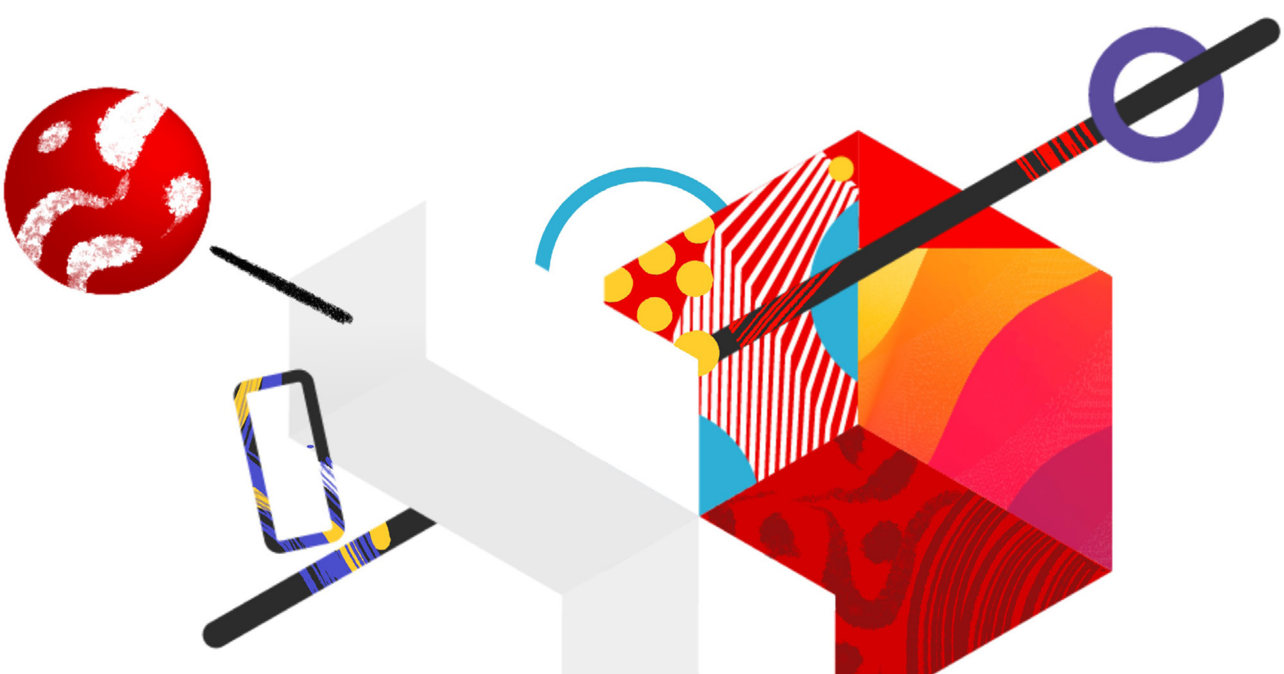
Increase sales productivity

All sales tasks vary. Sales reps who spend most of their time cold calling, or following up with bad leads, will lag behind those making prospect visits, giving demos, and explaining your company's value to target prospects. You can measure your marketing automation's impact on sales productivity by recording how reps spend their time before, versus after, you launch lead scoring. Also, if leads are better prepared by the time they're sent to sales, your team will spend less time nurturing them. This means you should also look at the number of touchpoints with sales before purchase.

Organizations that measure the number of outbound calls, demos, and prospect visits will find this easier to do. A smaller company may want to do an informal sales rep survey to find out about their activities before they start lead scoring.

You can measure the results in simple dollars. Look at how much revenue is being generated by each rep before and after lead scoring is implemented. The increase here will be the ultimate measure of how successful lead scoring has been for your organization.

	Before lead scoring	After lead scoring
Revenue generated		
Number of sales reps		
Revenue per sales rep (revenue generated / number of reps)		



Putting it all into play

Select a marketing automation system

Creating a lead scoring system starts with putting the right tools in place. Many marketing automation systems will say they perform lead scoring, but often you're limited to a predetermined model or scoring system that focuses solely on behavior or demographics. Use this checklist to help you choose the right system for your organization.

Marketing automation lead scoring functionality checklist:

☐ **Lead scoring can be done based on lead attributes and behaviors.**
Business reason: Score accuracy distinguishes between hot sales leads and nurturing candidates.

☐ **Lead scoring can be based on activity data in the CRM system.**
Business reason: Scoring on all data elements, including activity, enables marketers to gauge prospect interest and readiness.

☐ **A lead score can be recalculated based on a trigger event or schedule.**
Business reason: Activities and events improve the understanding of a prospect's mindset.

☐ **A lead score can be displayed as both a number and a visual icon for the sales rep.**
Business reason: A visual cue is usually easier to interpret than a score displayed as a number.

☐ **A lead score can be changed automatically and manually.**
Business reason: A sales rep who interacts with the lead gains insight into an accurate score.

☐ **A sales rep can drill down into the lead score to see the activity that created the scoring.**
Business reason: Just sharing a score with no insight into how it was achieved may cause the rep to distrust the score.

☐ **A lead score can identify active versus latent buying behavior?**
Business reason: Not every prospect activity indicates buying behavior.

Marketing automation lead scoring functionality checklist:

☐ **Each scoring attribute—demographic and behavioral—can be assigned different weights.**
Business reason: Each prospect's demographic and behavior may not be of equal importance. Weighting these values separately ensures that the right leads get to sales at the right time.

☐ **A lead score can be automatically decreased due to inactivity.**
Business reason: Inactivity is just as important as activity in lead scoring.

☐ **You can have multiple lead scores per lead.**
Business reason: Multiple lead scores gauge different levels of interest across product lines and categories where relevant.

☐ **Lead scoring can be managed in the marketing automation tool and used for targeting or segmenting.**
Business reason: Managing lead scoring in a marketing automation tool enables targeting or segmenting campaigns by company.

☐ **Lead scoring rules can be managed by individual marketing users as well as administrators.**
Business reason: Lead scoring is an ongoing process. Relying on administrators to manage scoring rules can mean they won't get adjusted, creating a weaker scoring model.

☐ **The marketing automation solution can integrate with the third-party apps you use for social monitoring, direct mail campaigns, and more, so your lead score accounts for all your channels.**
Business reason: Scoring across all channels provides a complete view of the buyer's journey.

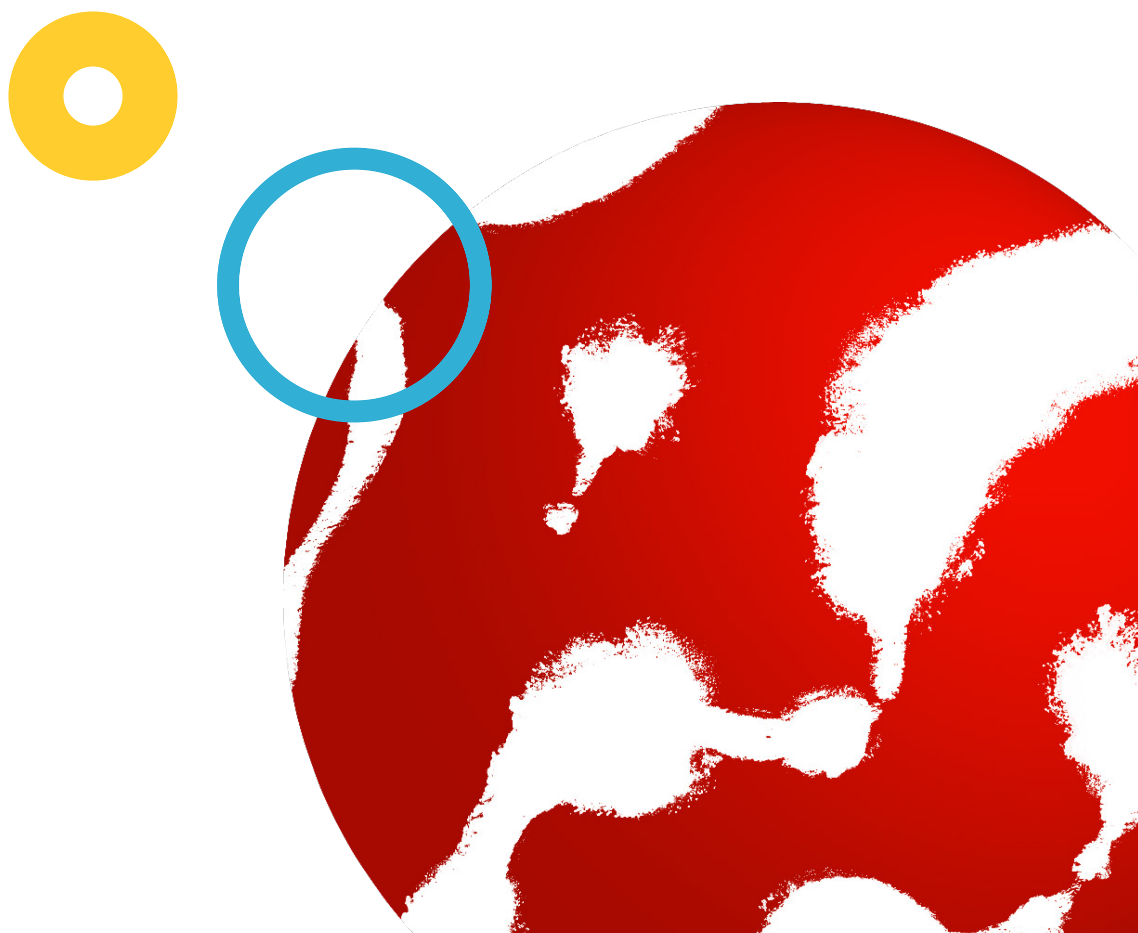
☐ **Marketing automation can report on leads in your database by stage, time in stage, and so forth.**
Business reason: Data on how long leads spend in each stage gives insight into how to keep leads moving through the funnel.

☐ **The marketing automation solution can do account-based scoring and provide relevant content across all channels.**
Business reason: Delivering relevant content to account-based leads improves engagement and conversion.

Go from consideration to conversion

Lead scoring is an integral part of lead management. By tracking your prospect's online behaviors and web activity, you can determine their level of interest in your solution—as well as your level of interest in them. Only by combining both factors can you send truly qualified leads to sales, promote sales and marketing alignment, and enhance revenue performance.

When you invest in lead scoring, you make the most out of every lead that enters your database. This helps you increase the success of your marketing campaigns, create a higher quality and quantity of sales leads, and increase conversion rates and revenue growth.



Adobe Experience Cloud

Adobe Experience Cloud is the most comprehensive suite of customer experience management tools on the market. With solutions for data, content, engagement, commerce, personalization, and more, Experience Cloud is built on the world's first platform designed specifically to create customer experiences. Each product is built on a foundation of artificial intelligence and works seamlessly with other Adobe products. And they integrate with your existing technology and future innovations, so you can consistently deliver the right experience every time.

Marketo Engage

Marketo Engage specializes in customer engagement for complex B2B buying journeys. As a complete solution for lead management, it brings marketing and sales together to nurture leads, orchestrate personalized experiences, optimize content, and measure business impact across every channel. It natively supports both demand- and account-based marketing strategies, providing a single, integrated lead management platform from acquisition to advocacy. Build engaging, personalized experiences at scale and prove impact with Marketo Engage.

Adobe