

4

Lead Scoring

What is Lead Scoring?

Lead scoring is the process of assigning points that identify a lead's interest and reflects their location in the sales process. Points are assigned based on an agreement by the marketing and sales departments. They incorporate a combination of demographics, activities, and lead source.

Why do I need lead scoring?

Lead scoring is used to identify sales ready leads and those that would benefit from additional marketing activities. It is one component of a successful lead nurturing program.

What lead scoring is NOT

Lead scoring is not an activity that is done independently by the marketing or sales departments. It's a continuous joint effort by both departments to define a qualified lead.

Lead scoring – Basic techniques

- Align marketing and sales departments to define a sales ready lead.
- Establish a consistent lead scoring methodology to rank leads.
- Determine a score threshold that will indicate a sales ready lead
- Start by assigning lead scoring rules based on Attribute data like demographic information.
- Set up alerts that notify the sales department when a lead score threshold is met.

Lead scoring – Advanced techniques

- Assign rules based on Activity data like adding items to a shopping cart and participating in a forum.
- Assign lead scoring rules based on the online behaviors of

anonymous and known visitors

- Explore multiple scoring scenarios to gain greater insights into a leads level of interest in different products or campaigns.
- Define an expiration period for scores that match the sales cycle.

Lead scoring optimization

- Review scoring and criteria to provide the most accurate score possible
- Review score of won and lost opportunities to verify they were what was expected for top prospects
- Review leads with high scores that did not turn into opportunities. How could the scoring be improved?
- Review contacts online behavior to see if their actions are really demonstrating the best leads and are being reflected properly in the score.

Top Resources

Scoring overview:

http://devnet.kentico.com/docs/onlinemarketingguide/scoring_overview.htm

SalesForce Connector for Kentico EMS:

<http://devnet.kentico.com/Marketplace/Integration/SalesForce-Connector.aspx>

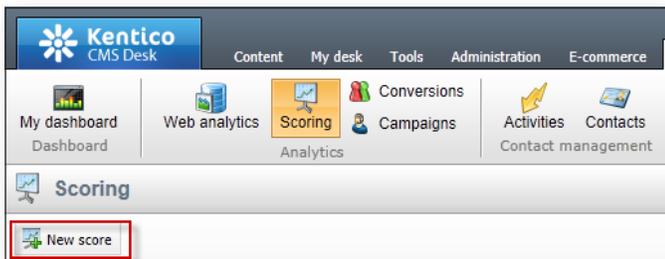
4

Lead Scoring quick start

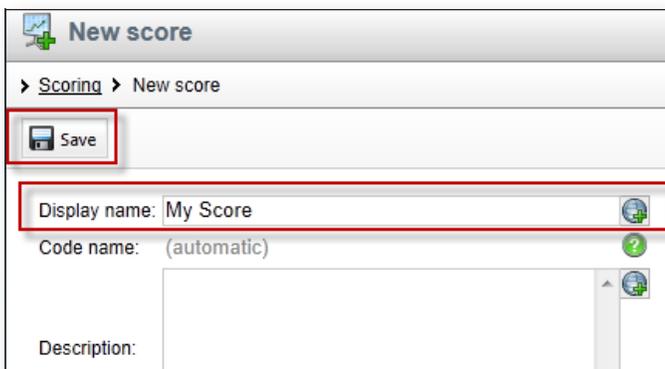
1. In **CMS Desk** select the **On-line marketing** tab and then click the **Scoring** button as shown in the following screenshot.



2. In the **Scoring** screen select the **New score** link as shown in the following screenshot.



3. In the **Display** name field enter **My Score**, in the **Code name** field enter **MyScore** and then click the **Save** button as shown in the following screenshot.



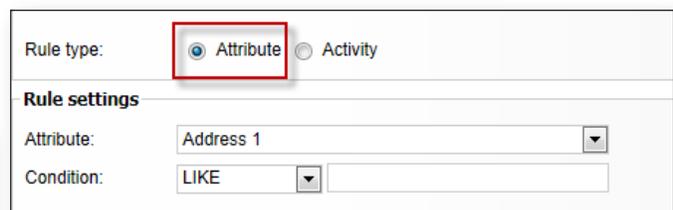
4. In the **Score properties** screen in the **Send notification at score** enter **45**, in the **Notification e-mail address** enter **yourname@company.com** as shown in the following screenshot and then click **Save**.



5. In the **Score properties** screen select the **Rules** tab and then click the **New rule** link as shown in the following screenshot.

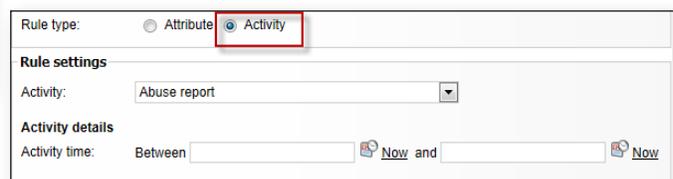


What is an Attribute based rule?



Rule is based on a system attribute, which can include either built-in or custom attributes.

What is an Activity based rule?



Rule is based on an activity that the user completed, which can include both standard and custom activities.