# **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





# Lead Scoring quick start

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

Kentico CMS Desk	Content My de	esk Tools Adı	ninistration B	E-commerce	On-line marketing	_
My dashboard We Dashboard	ab analytics	Conversions Campaigns	Activities Contact m	Contacts anagement	Contact groups Segmentation	Newsletters E-mail marketing



1.

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

Kent CMS De	ico sk Coni	tent My de	esk Tools Ad	lministration f	E-commerce
My dashboard	Web analytics	-	Conversions Campaigns	Activities	Contacts
Scoring		Analytics		Contact m	anagement
A New score					



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.

Rew score				
Scoring New score				
Save				
Display name: My Score				
Code name: (automatic)	0			
	^ <b>@</b>			
Description:				



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**.

Enabled:		
Send notification at score:	45	1
Notification e-mail address:	yourname@company.com	
Schedule rebuild:		9



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

😴 Score properties			
> Scoring > My Score			
Contacts General Rules			
No data round.			

# What is an Attribute based rule?

Rule type:	Attribute Activity
Rule settings	
Attribute:	Address 1
Condition:	LIKE

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

## What is an Activity based rule?

Rule type:	Attribute     Activity	
Rule settings		
Activity:	Abuse report	
Activity details		
Activity time:	Between 8	Now Now
Location		

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