

How to Implement Smart Lead Scoring

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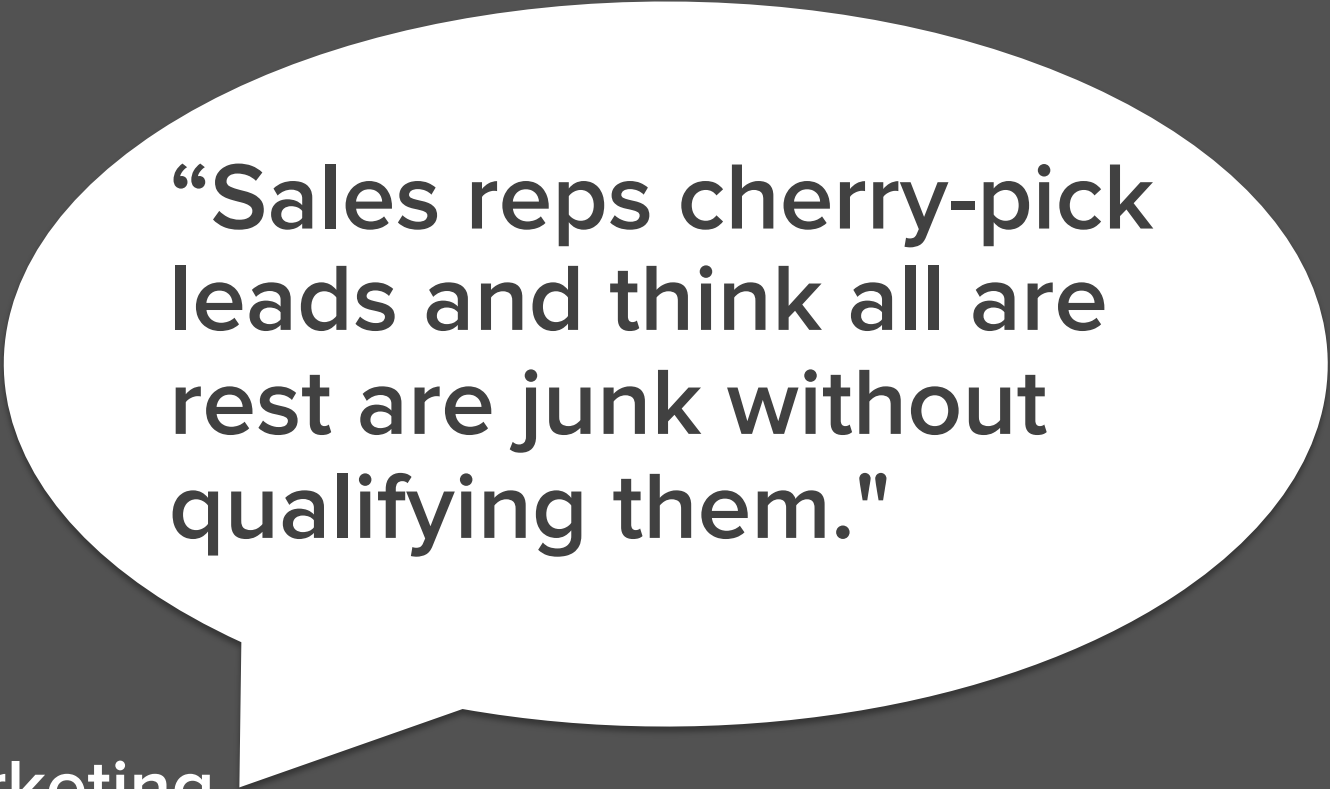
JESSICA
MEHER

@jessicameher

Download today's slides at
hubspot.com/leadscoring

**"There aren't enough leads
and the leads that we do
get aren't any good."**

Sales



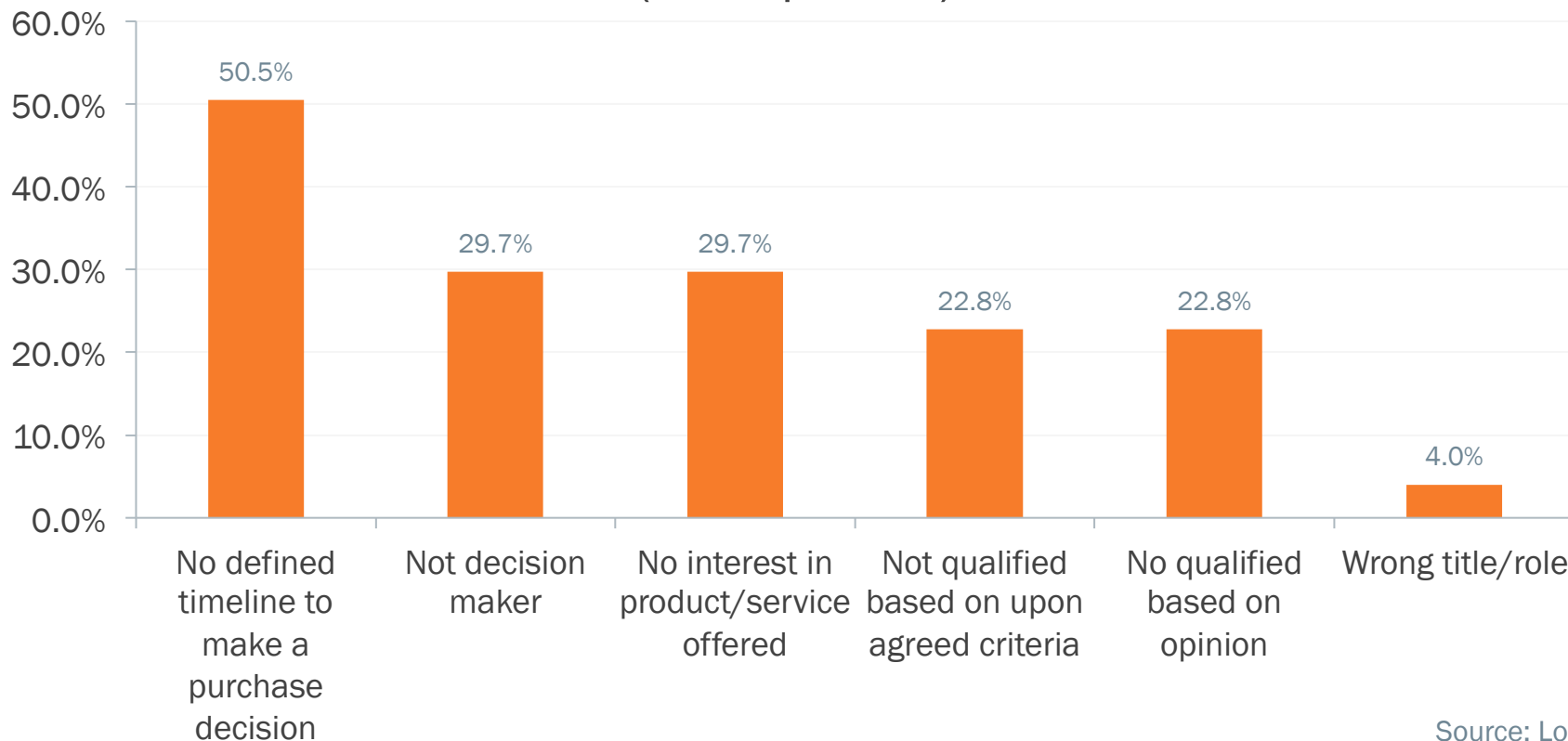
“Sales reps cherry-pick leads and think all the rest are junk without qualifying them.”

Marketing



Most Frequent Complaints About Low Lead Quality

(% of respondents)



Source: Loopfuse



Why use lead scoring?

**Less than 25% of new
leads are ready to buy.**

Lead scoring is a shared formula and methodology for ranking leads by their propensity to buy.

For Marketers, scoring helps:

- 1 Measure marketing effectiveness and lead quality
- 2 Improves lead nurturing
- 3 Deliver more valuable you are to the organization

For Sales, scoring helps:

- 1 Identify hot leads faster
- 2 Improves productivity by prioritizing leads
- 3 Accurately forecast
- 4 Improve sales effectiveness and pipeline

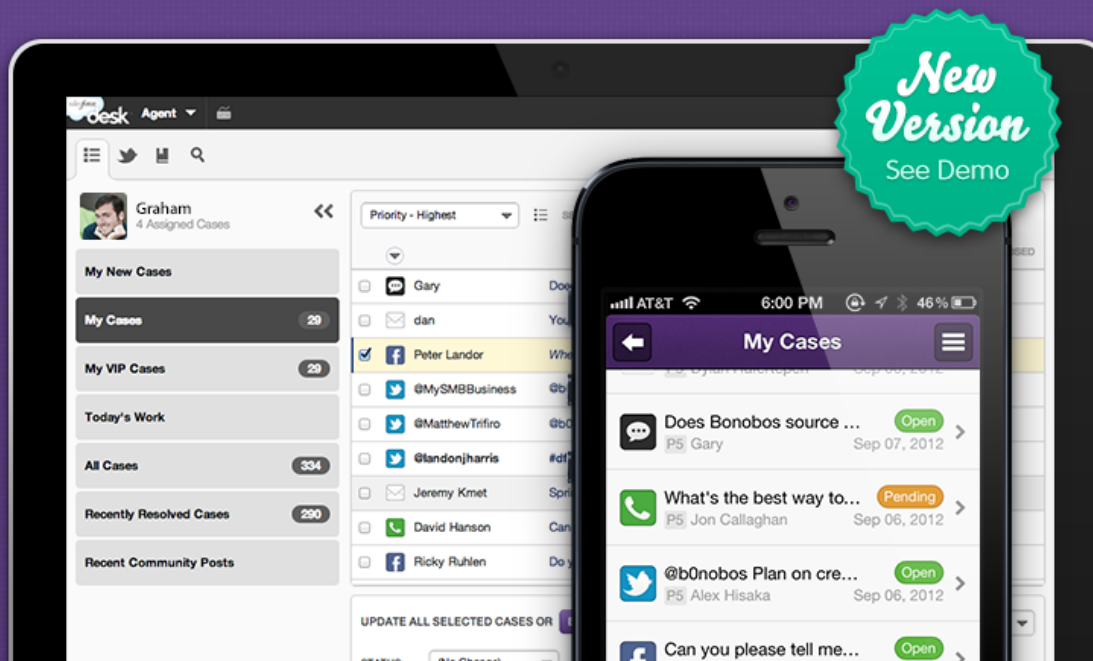
Companies that do lead scoring right have a
**192% higher average lead
qualification rate.**

Delight your customers with awesome Customer Support

TRY IT FOR FREE TODAY No credit card required.

GET STARTED ►

REQUEST A DEMO



"We're finally able to support our customers confidently."

rdio



Meet the new classroom. Mimio.



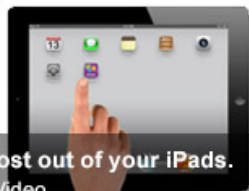
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Administrators

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the **MimioMobile** application

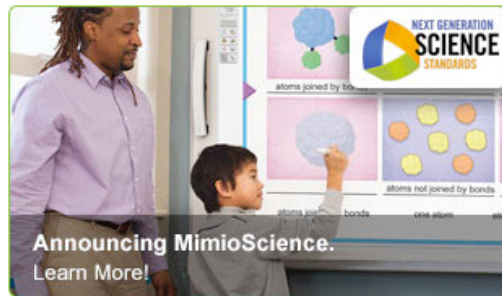


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1 Do I Need Lead Scoring?

First ask yourself....

- ☒ Is my sales team getting fed with enough leads?
- ☒ Does my sales team even call the leads I do send them?
- ☒ Do I have enough data to implement lead scoring?

2 Common pitfalls.

The Wrong Way to Score Leads (Don't Do This)

If the company has over 50M in revenue = 10 points

VP title = 25 points

BANT = 50 points

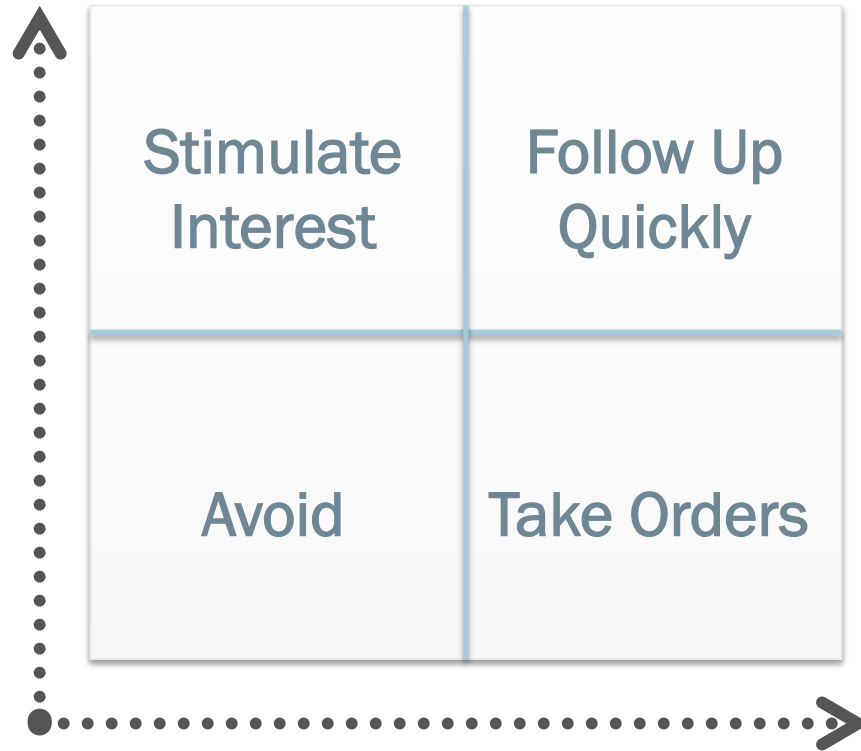
If over 75 points, it goes to sales

Other Pitfalls

- Relying on BANT from lead forms
- Asking for too much or not asking at the right time
- Assuming bigger companies or titles are better

3 Defining Quality Leads.

Fit (Explicit)



Interest (Implicit)

Examples

Explicit (Demographic)

- Job title/Role
- Company size
- Industry/vertical
- Annual revenue
- # of Employees

Implicit (Behavior & Activity)

- # of pageviews
- # of downloads
- Type of content consumed
- Type of pages viewed
- Recency of activity

2 Choose number of contacts

Add up the number of contacts in all of your email lists, then add the number of new leads you generate annually from your existing site.

Contacts	Price per 1,000	Price
50	—	\$0/mo
1,000	\$100	\$100/mo
2,000	\$100	\$200/mo
3,000	\$100	\$300/mo
✓ 4,000	\$100	\$400/mo
5,000	\$100	\$500/mo
6,000	\$100	\$600/mo
7,000	\$100	\$700/mo
\$40 per 1,000 contacts		
20,000	\$40	\$800/mo
25,000	\$40	\$1,000/mo
30,000	\$40	\$1,200/mo
35,000	\$40	\$1,400/mo
40,000	\$40	\$1,600/mo

3 Your estimated price

\$ **1,000**/mo*

Professional package	\$600/mo
4,000 contacts plan	\$400/mo
Yearly pricing	× 12
<hr/>	
	\$12,000/yr

* All products are billed on an annual basis and require additional setup fees

Consulting and setup options

HubSpot offers several consulting and setup plans to ensure you get up to speed quickly with our software.

- ✓ **Inbound Success Training** – \$2,000 (required)
 - **Partner Inbound Success Training** – \$2,000
 - **Advanced Inbound Success Training** – \$7,000
 - **Website migration** – \$10/page (optional)

Want a quote?

Contact us and a member of our friendly sales team will schedule a time to chat

Have questions?

Give us a call and a friendly HubSpotter will answer any

Clicked Pricing Options on Pricing Page

01/01/2013 - 07/31/2013...

[Back to all events](#)

Traffic Trend

[First Touch Sources](#)[Last Touch Sources](#)[Assists](#)[Report Actions](#)[Edit event](#)[View activity log](#)

173,227

Event Completions

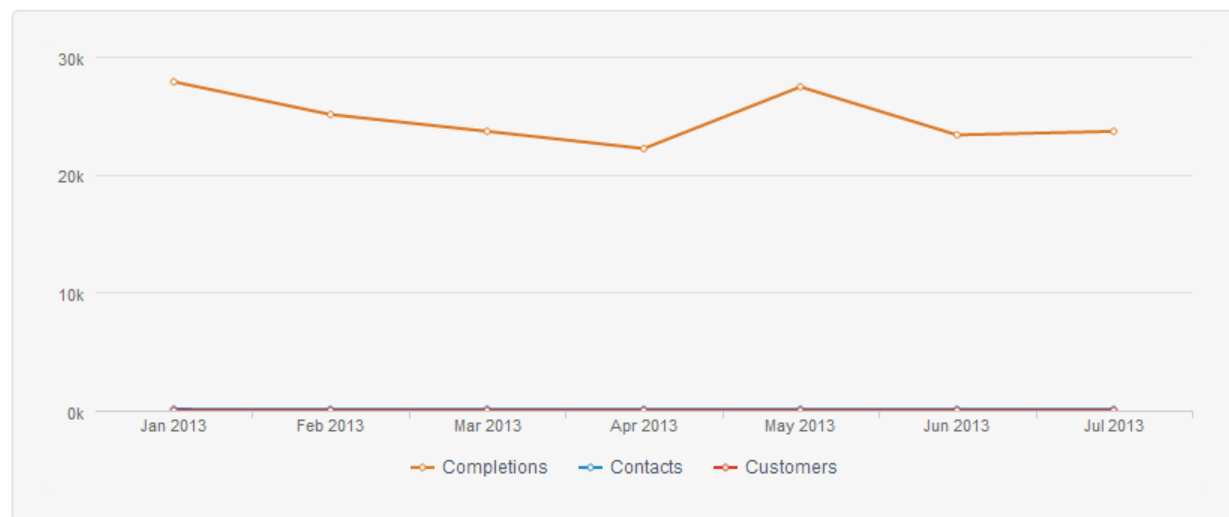
712

Contacts Created

34

Customers Created

Number of people who completed the event "Clicked Pricing Options on Pricing Page"



Data Last Updated: 3 hours ago

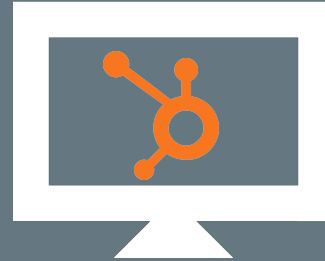
Collecting the Data For Scoring



Lead Forms



Data Append

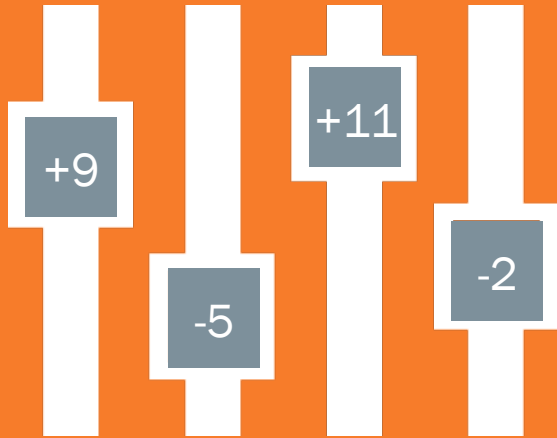


Marketing
Software



CRM

4 Implementing Lead Scoring.



Points-based

Step 1: Gather the Information

Look at explicit and implicit data

- Industry
- Job title
- Revenue
- Employee Size
- Content downloaded
- Pages viewed
- First touch (original source)
- Last touch

Example Report

First Conversion Event ▼ MQL Event ▼ All leads ▼ Create Date ▼ Last 60 Days
From 6/13/2013 To 8/11/2013

Run Report ▼ Show Details Customize Save Save As Delete Printable View Export Details Add to Campaign

Filtered By: [Edit](#)

First Conversion Event not equal to [Clear](#)

AND From Rotator Queue Team Type equals enterprise [Clear](#)

AND MQL Event equals Demo,IMA,Trial,Contact Sales [Clear](#)

			MQL Event				Grand Total
First Conversion Event			Demo	IMA	Trial	Contact Sales	
<input type="checkbox"/>	Form: 101 Companies Rocking Social Media Marketing, Form: Generic Form with Progressive Profiling - Download	Record Count	0	0	1	0	1
<input type="checkbox"/>	Form: 10-Step Guide to Social Link Building, Form: Generic Form with Progressive Profiling - Download	Record Count	1	0	0	0	1
<input type="checkbox"/>	Form: 10 Useless Things to Cut From Your Marketing, Form: 10 Things to Cut From Your Marketing	Record Count	0	0	1	0	1
<input type="checkbox"/>	Form: 120 Awesome Marketing Stats, Charts, and Graphs, Form: 120 Awesome Marketing Stats, Charts, and Graphs	Record Count	0	0	1	0	1
<input type="checkbox"/>	Form: 16 Companies in 'Boring' Industries Creating Remarkable Content Free Download, Form: Generic Form with Progressive Profiling - Download	Record Count	0	1	0	0	1
<input type="checkbox"/>	Form: 2013 State of Inbound Marketing, Form: Generic Form with Progressive Profiling - Download	Record Count	0	1	0	0	1
<input type="checkbox"/>	Form: 2013 State of Inbound Marketing Europe, Form: Generic Form with Progressive Profiling - Download	Record Count	0	1	0	0	1
<input type="checkbox"/>	Form: 30-Day Free Trial for Website Grader Users, Form: Generic Form with Progressive Profiling - Download	Record Count	0	0	1	0	1
<input type="checkbox"/>	Form: 75 Free Stock Photos Ready for Use Anywhere (No Royalties, No Fees, No Worries), Form: Generic Form with Progressive Profiling - Download	Record Count	1	1	0	0	2
<input type="checkbox"/>	Form: 79 Free Landing Page Templates, Form: Generic Form with Progressive Profiling - Download	Record Count	0	0	1	0	1
<input type="checkbox"/>	Form: A Guide to Pinterest's New Business Accounts, Form: Generic Form with Progressive Profiling - Download	Record Count	0	2	0	0	2
<input type="checkbox"/>	Form: An Introduction to Business Blogging, Form: Generic Form with Progressive Profiling - Download	Record Count	0	0	1	0	1

Active vs. Latent Behavior

Contact 1

[+ Add/Remove from Lists](#) [Resync With Salesforce](#) [Opt Out of Email](#) [Close as Customer](#) [Delete](#)

First Touch
2 Years Ago

Last Touch
15 Days Ago
[Form Submission](#)

Lifecycle Stage
Lead
Since Apr 9, 2013

Starred

[Return to All Contacts](#)

Showing 17 Form Submissions

August

- 2 Emails
- 4 List Memberships

July

- 2 Form Submissions
[Demo - Generic \(2\)](#)
[Show Submission Details - Sat Jul 27, 2013 at 4:20am](#)
- 2 Events
[How to Unlock the ROI of Your Marketing with Analytics](#)
[Show Submission Details - Sat Jul 27, 2013 at 4:20am](#)
- 1 Website Visit
- 6 Emails
- 5 Automation Events
- 16 List Memberships
- 2 Syncs

June

- 5 Events
- 2 Website Visits
- 9 Emails
- 2 List Memberships

May

- 8 Emails
- 2 List Memberships

April

- 1 Form Submission
[Generic Form with Progressive Profiling - Download](#)
[Show Submission Details - Tue Apr 9, 2013 at 3:53pm](#)
- 2 Events
- 2 Website Visits
- 10 Emails
- 2 Automation Events
- 5 List Memberships

March

- 2 Emails
- 1 List Membership
- 10 List Memberships
- 2 Syncs

Contact Details

Overview

Properties

Lists

Workflows

Property History

Contact Research

Search in Google

View in Salesforce

Public Contact URL

<https://app.hubspot.cc>

Contacts Settings

Contact 2

[+ Add/Remove from Lists](#) [Resync With Salesforce](#) [Opt Out of Email](#) [Close as Customer](#) [Delete](#)

First Touch
3 Years Ago

Last Touch
5 Days Ago
[Opened Email](#)

Lifecycle Stage
Lead
Since May 30, 2013

Starred

Showing 51 Form Submissions

August

- 6 Form Submissions
[Demo - Generic \(2\)](#)
[Show Submission Details - Sat Aug 3, 2013 at 11:57am](#) 2 Updated Properties
- 10 Emails
[SEO Template Guide](#)
[Show Submission Details - Sat Aug 3, 2013 at 11:57am](#) 3 Updated Properties
- 21 Events
[Generic Form with Progressive Profiling - Download](#)
[Show Submission Details - Thu Aug 1, 2013 at 5:14pm](#) 2 Updated Properties
- 2 Website Visits
[Mobile Marketing Kit](#)
[Show Submission Details - Thu Aug 1, 2013 at 5:08pm](#) 2 Updated Properties
- 16 Automation Events
[Inbound Marketing Assessment - Generic](#)
[Show Submission Details - Thu Aug 1, 2013 at 4:57pm](#) 2 Updated Properties
- 8 List Memberships
[Generic Form with Progressive Profiling - Webinar](#)
[Show Submission Details - Thu Aug 1, 2013 at 4:57pm](#) 9 Updated Properties
- 2 Syncs

Contact Details

Overview

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Public Contact URL

<https://app.hubspot.cc>

Contacts Settings

Negative Scoring

- 1 Latent buying behavior
- 2 Using a free email provider (e.g. gmail)
- 3 Geographic location
- 4 Non-product page visit (e.g. career page)
- 5 Negative social media comment
- 6 Email subscribe
- 7 Sales rejects the lead

Step 2: Align with Sales

- 1 Ideal buyer persona
- 2 What constitutes as a sales-ready lead?

Step 3: Establish Scoring Criteria

- 1 Establish scoring methodology (points, grades, etc.)
- 2 Determine a score threshold that will indicate a sales-ready lead (e.g. 75 or higher)
- 3 Establish length of time required for sales to follow-up
- 4 Build scoring criteria, rank by critical, important, influential, or negative

Explicit

Attribution	Value	Score
Critical (10-15 Points)		
Role	VP, Sales	+12
Industry	Technology	+10
Biggest Challenge	Lead Gen	+15
Employees	200-1000	+13
Important (5-9 points)		
Location	US	+9
Employees	50-199	+8
Role	Manager	+5
Timeline	6 months	+5
Influencing (1-4 points)		
Location	Non-US, English speaking	+4
Timeline	12 months	+2
Employees	10-49	+1
Negative		
Role	Student	-15
Company	Unemployed	-15
Location	Asia	-10
Employees	1 or less	-13

Implicit

Attribution	Score
Critical (10-15 Points)	
Downloads free trial	+15
Visit & clicked on pricing page	+14
Downloads RFP	+11
Watches online demo	+10
Important (5-9 points)	
Downloades MOFU offer	+9
Searches for "HubSpot"	+8
Visits 3+ product pages	+5
Heavy website activity	+5
Influencing (1-4 points)	
Watches webinar	+4
Downloads ebook	+2
Recent event date < 30 days	+4
Negative	
Recent event date > 30 days	-5
Recent event date > 60 days	-15
Visits careers page	-10
Email unsubscribes	-5

Pre-implementation Check

- 1 Take a random sample of opportunities and customers
- 2 Examine each implicit and explicit data points, then assign points to each based on your model
- 3 Identify the percentage that would qualify as sales-ready

Lead Scoring [Tutorial](#)

[Return to Settings](#)

The rules below determine a contact's **HubSpot Score**. You can [create a Smart List](#) to see all contacts whose score is above a certain threshold.

Assign points to contacts who meet all of these requirements:



Page View

Contact

has visited (exact URL)

http://www.hubspot.com/pricing



On or after Jun 1, 2013 [Refine](#)

Rule Value: Add 20 points

Assign points to contacts who meet all of these requirements:



Contact Property

Number of Conversions

is greater than or equal to

4



Rule Value: Add 10 points

Assign points to contacts who meet all of these requirements:



List Membership

Contact

is a member of

All Leads (HS Recipes)



Rule Value: Add 10 points

Assign points to contacts who meet all of these requirements:



Event

Contact

has had event

Custom JS Event



No filter [Refine](#)

Rule Value: Add 10 points

Assign points to contacts who meet all of these requirements:



Contact Property

Emails Opened

is greater than or equal to

3



Rule Value: Add 10 points

Lead Scoring

[Tutorial](#)[Return to Settings](#)

The rules below determine a contact's **HubSpot Score**. You can [create a Smart List](#) to see all contacts whose score is above a certain threshold.

Assign points to contacts who meet all of these requirements:



Contact Property

Contact Sales Datetime

(simply has this property)



Rule Value: Add 54 points

Assign points to contacts who meet all of these requirements:



Contact Property

Demo Request Datetime

(simply has this property)



Rule Value: Add 34 points

Assign points to contacts who meet all of these requirements:



Contact Property

IMA Request Datetime

(simply has this property)



Rule Value: Add 14 points

Assign points to contacts who meet all of these requirements:



Contact Property

Trial Start Date

(simply has this property)



Rule Value: Add 12 points

Assign points to contacts who meet all of these requirements:



Contact Property

MQL Event

is equal to

Other x







Rule Value: Add 1 points

+ Add another rule to assign points to contacts who meet a different set of requirements

CRM View

▼ HubSpot Intelligence

-  **Generate more leads from Facebook for VNP**
Jun 18th 2013 - 4:04 pm
-  **HSCM-unbounce-comarketing-lead-generation-ebook-20130611**
Jun 18th 2013 - 3:40 pm
-  **Free Ebook: How to Generate Leads Using Facebook**
Jun 18th 2013 - 3:38 pm
-  **Generic Form with Progressive Profiling - Download**
Jun 18th 2013 - 3:36 pm

Visits: 194 Page Views: 454 Submissions: 45

Last Seen *5 hours ago* through:
Generate more leads from Facebook for VNP

Became a lead *7 months ago* through:
20 Marketing Trends and Predictions for 2013 and Beyond





First seen *2 years ago* via *organic search* through:hubspot

HUBSPOT SCORE:

58

[View In HubSpot](#)

Past Emails

-  **MK VSB Workflow Platypus to New 1's - Second**
LN VSB New 1-5s and Med, High In Progress to Platypus
-  **MK VSB Workflow Step by Step Guide**
LN VSB New 1-5s and Med, High In Progress to Platypus
-  **MK VSB Workflow Platypus to New 1's - First**
LN VSB New 1-5s and Med, High In Progress to Platypus
-  **SendEmail**
Internal workflow

Scheduled Emails

Contact does not have any future emails scheduled

LN Campaign - SMBs ▼

[Enroll In Workflow](#)

Contact is enrolled in 1 workflow



Dollar-based

MQL Type	Average Revenue / Customer	Lead to Customer Close %	Value per MQL
Whitepaper	\$160,000	1.0%	\$1,600
Webinar	\$100,000	1.5%	\$3,000
Online Demo	\$150,000	2.0%	\$3,000
Tradeshow	\$125,000	1.0%	\$1,250
Contact Sales	\$110,000	10.0%	\$11,000

[View all workflows](#)

Workflow details

[Edit workflow](#)[Performance](#)[History](#)[Workflow settings](#)[Browse Recipes](#)

Explore commonly used lists, emails, and workflows to generate ideas.

SLA-Enterprise-Demo

Begin this workflow when...



- A smart list updates


1 First workflow step


- Set property


[Save workflow](#)


When activated, this workflow will enroll...


 Workflow Is Live 

New contacts in list 

SLA-Enterprise-Demo 

✓ Enrolled the list's existing contacts 

 25 contacts


Unenroll contacts when they join a goal list (optional) 

No goal list selected 

Add step

1 First workflow step

Delay for Days Hours Minutes 

Set a contact property v... 

SLA Value 

56.33  

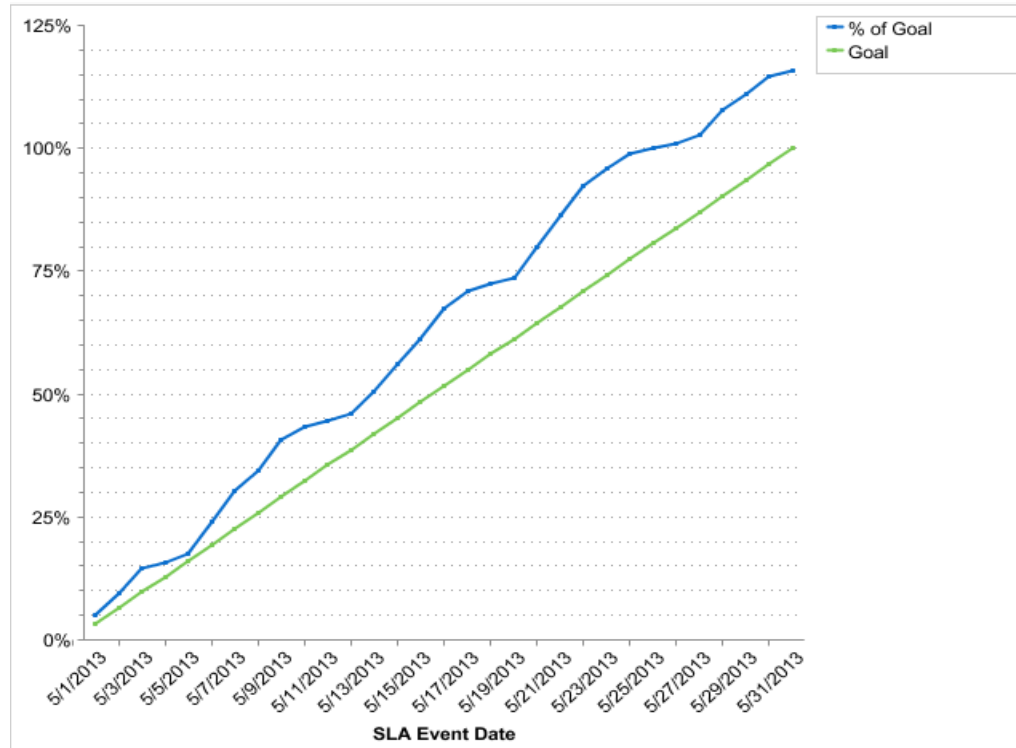
Add step

Need help?

Lead Record View

Demo Request Datetime	
IMA Requested	<input checked="" type="checkbox"/>
IMA Request Datetime	8/5/2013 1:42 PM
Contact Sales	<input type="checkbox"/>
Contact Sales Datetime	
ML Sales Team	Enterprise
SLA Value	28.70
SLA Event Date	8/4/2013
ML Event	IMA
ML Event Date	8/4/2013
ML Event from HS	Other
ML Date from HS	8/4/2013
From Rotator Queue	

Service Level Agreement (SLA)



Being
nurtured

Never gonna
buy



5 Improving Lead Scoring.

What to change?

- 1 Did top prospects have the top scores?
- 2 Does content still have the same weight?
- 3 Is the lead score threshold still accurate?
- 4 What new types of activity increase customers?
- 5 Have you entered a new market? New products?

A close-up photograph of a baby with light brown hair and blue eyes, looking directly at the camera with a determined, slightly pouting expression. The baby is wearing a green and white long-sleeved shirt and is holding a small clump of sand in their right fist. The background is a blurred beach scene with sand and waves in the distance.

Lead scoring,
I got this.

A better relationship
between sales and
marketing.



QUESTIONS?



**EXTRA
GOODIES**

6 Advanced Lead Scoring.



1 Account Scoring

2 Using Big Data

