23 1/2 TIPS TO MASTER LEAD SCORING

The Hows, The Whos and The Whatchamacallits

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NICE TO MEET YOU

Michael Rejmaniak
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Ask me about: CRM integrations, workflows and how to make a good pasta salad

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Ask me about: Sales and marketing alignment, metrics and the band Cowboy Mouth

AGENDA

1. High level jargon stuff
2. Lead scoring model inputs
3. Lead scoring in HubSpot
4. Wrapping up: Things to keep in mind
5. Q & A

192%

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

- Aberdeen Research

1 | HIGH LEVEL JARGON STUFF

1. KNOW DEFINITION OF LEAD SCORING

- (So you can easily explain it to non-Inbound geniuses)

Lead Scoring is a way to predict a person's readiness to buy based on a set of data and activities.

2. DEFINING MQL NOT JUST FOR MARKETING

- Develop MQL criteria with both Marketing and Sales
- (Yes those guys with the real slick haircuts. Think *Boiler Room*)

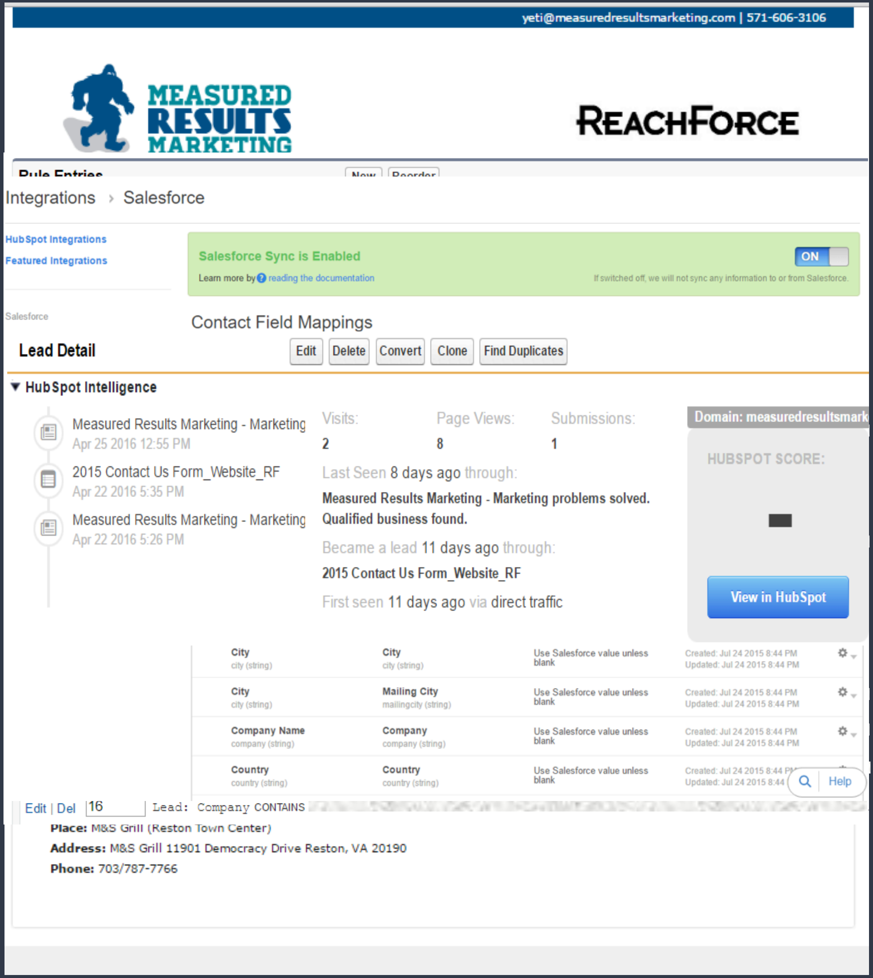
208%

Companies with aligned sales and marketing generated 208% more revenue from marketing.

- [HubSpot]

3. LEAD SCORING IMPACTS ALL MARKETING AUTOMATION PROCESSES

- When developing your scoring model, you must think about all the pieces that are affected by it.
- Landing pages, forms, fields, integrations, lead assignment criteria



2 | LEAD SCORING MODEL INPUTS

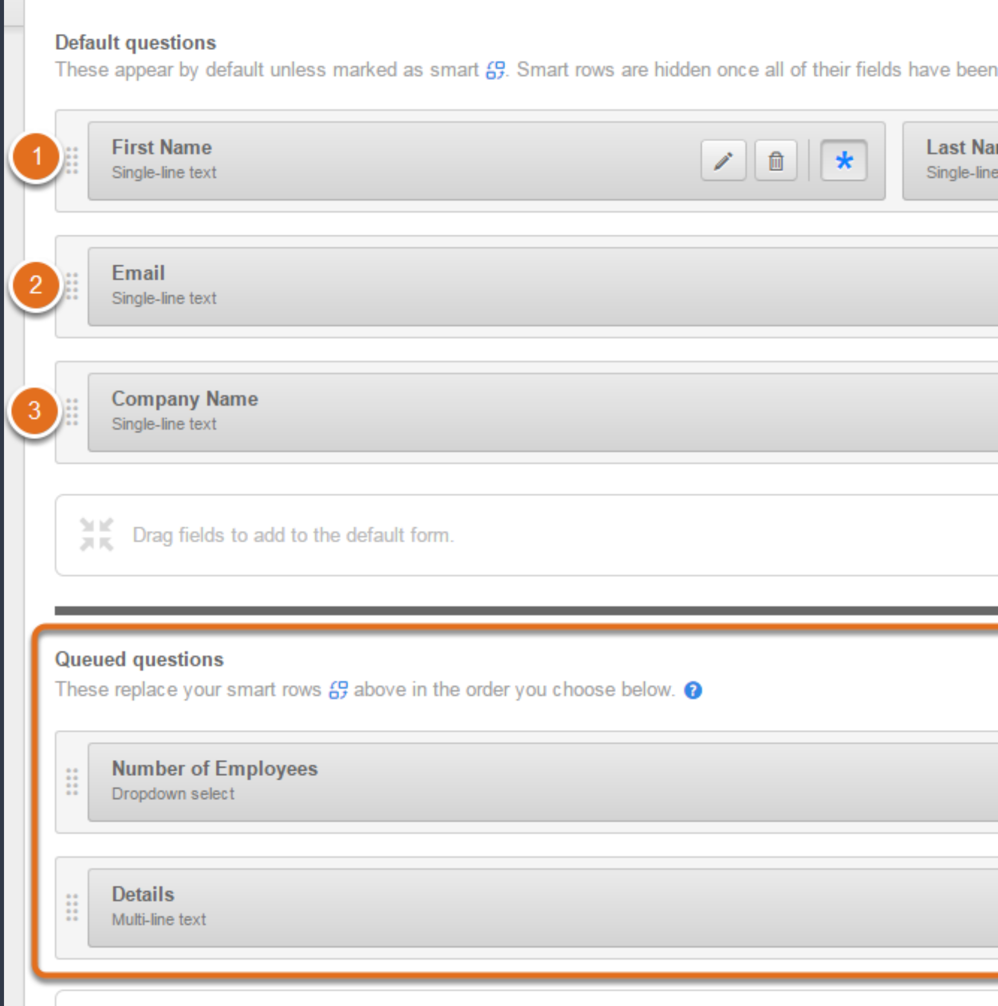
4. USE EXPLICIT (FIRMOGRAPHIC) / IMPLICIT (BEHAVIORAL) DATA.

It’s ok to start with the data you have already and refine over time

5. IS IT POSSIBLE TO CAPTURE OR INFER MQL DATA?

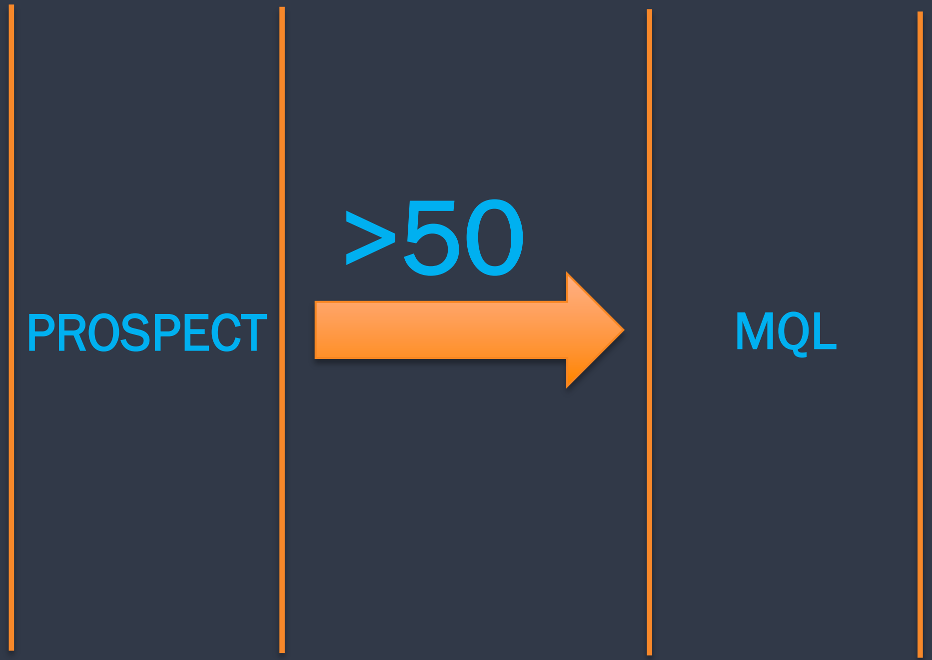
6. GET CREATIVE WITH YOUR DATA CAPTURE

- Pace data capture through progressive profiling on your forms. http://bit.ly/2du0VEu
- Consider data appending companies to help capture additional data you need.



7. PICK MINIMUM SCORE FOR MQL AS BASIS FOR MODEL

- Think about what criteria should be an “Automatic qualifier” that should send a lead across and score those highly

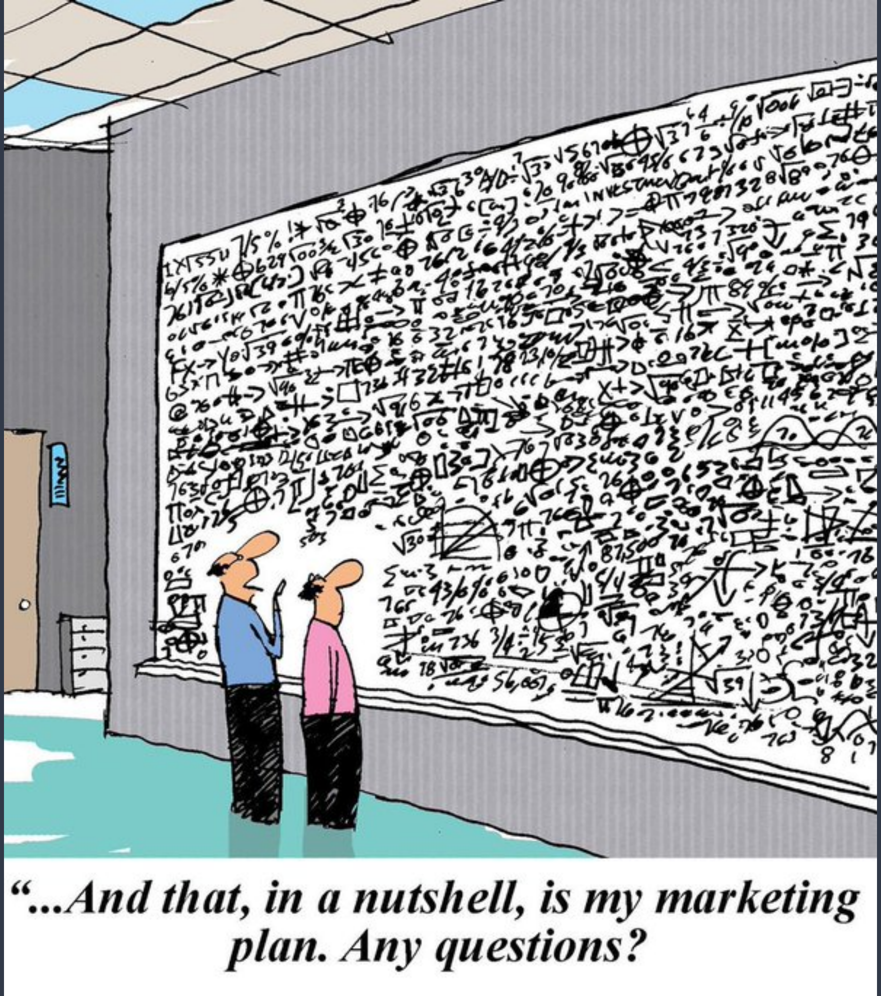


8. THINK ABOUT COMMON PATHS THROUGH YOUR BUYER'S JOURNEY

- Compare common activities
- Pin those against your scoring model
- Are they scoring as expected?

9. BEFORE YOU DIVE IN, START WITH A WHITE BOARD

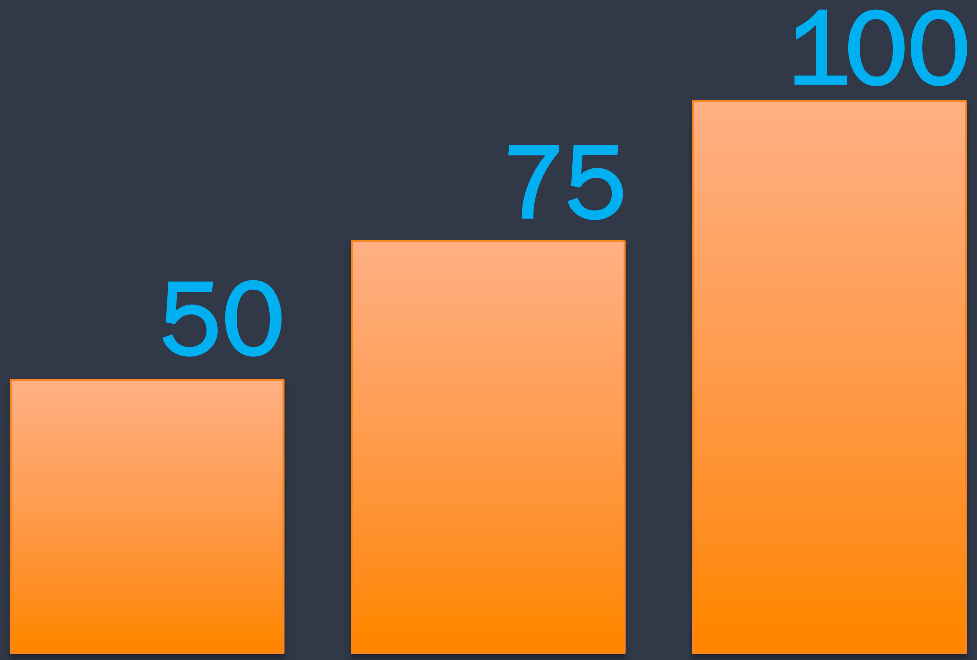
- Like a complex workflow, it’s best to map out all your attributes in a document and assign them a score.



http://www.therapymarketingcoach.com/marketing/

10. CASE STUDY

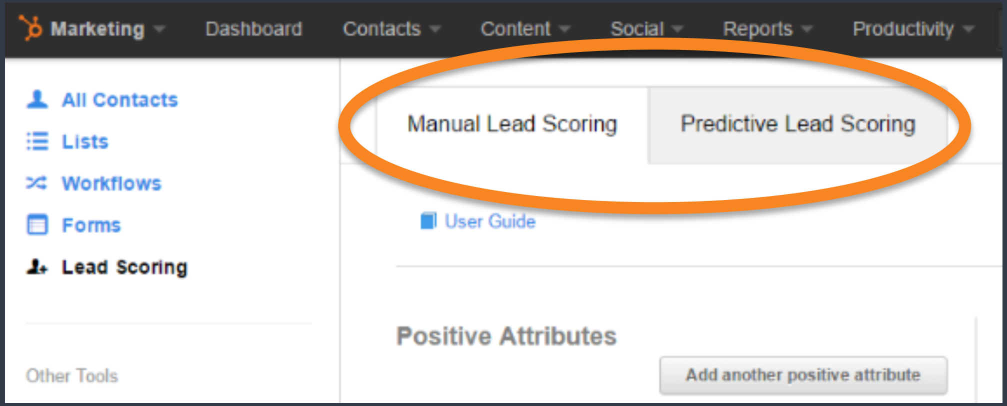
Creating an initial lead scoring model



3 | LEAD SCORING IN HUBSPOT

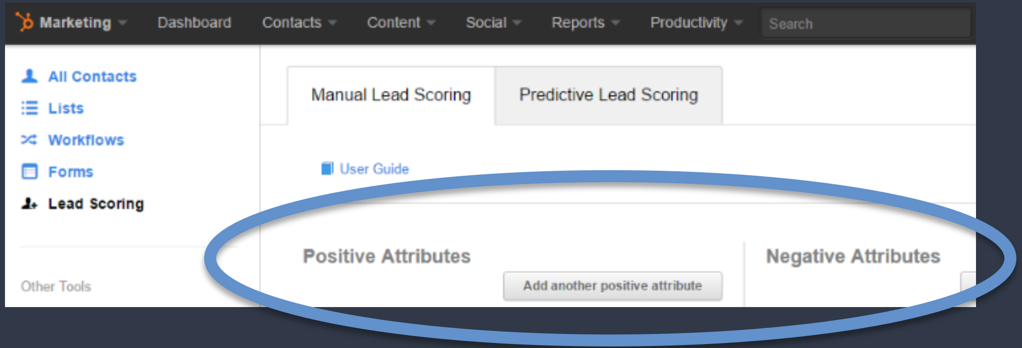
11. PREDICTIVE & MANUAL OPTIONS

- Predictive Lead Scoring uses your historical data to learn the attributes and behaviors that lead to customer acquisition.
- Manual Lead Scoring allows you to build completely custom model based on the attributes/activities you know are important.



What version of HubSpot do I have? http://bit.ly/2diuH1f

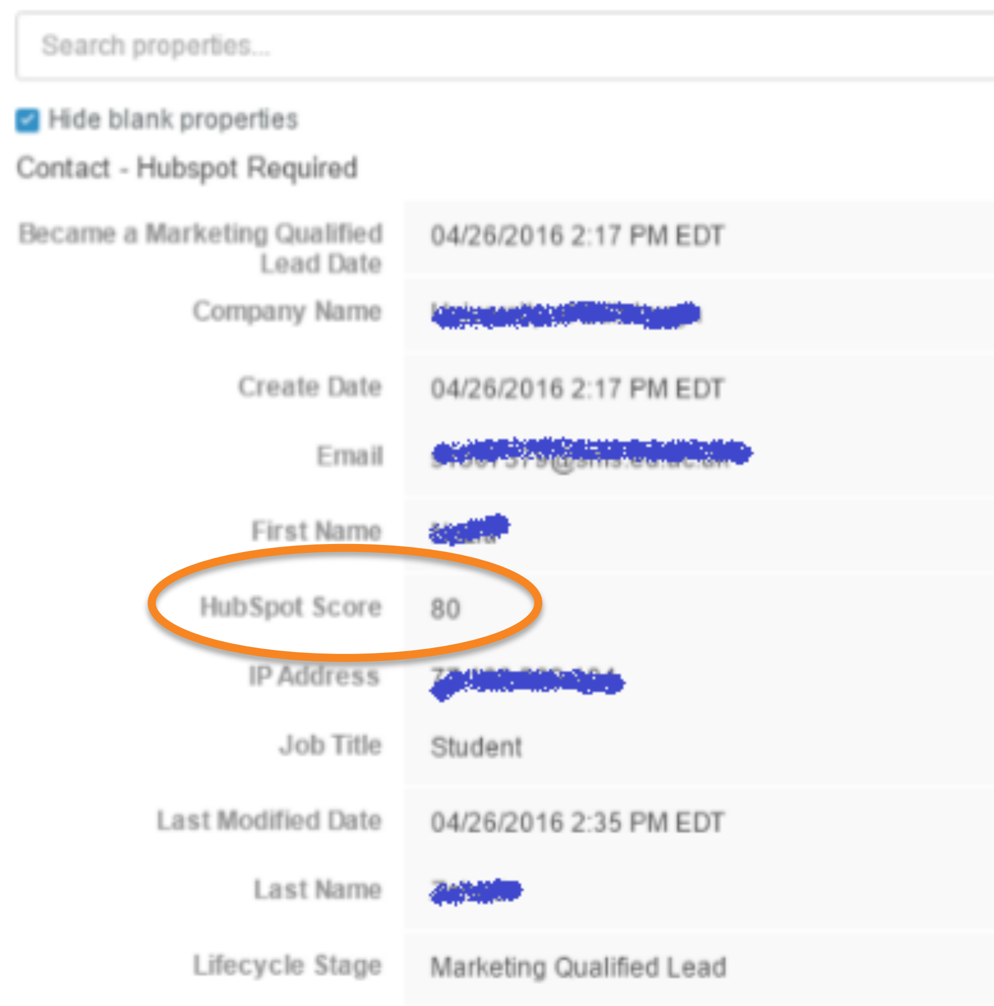
12. USE BOTH POSITIVE & NEGATIVE ATTRIBUTES



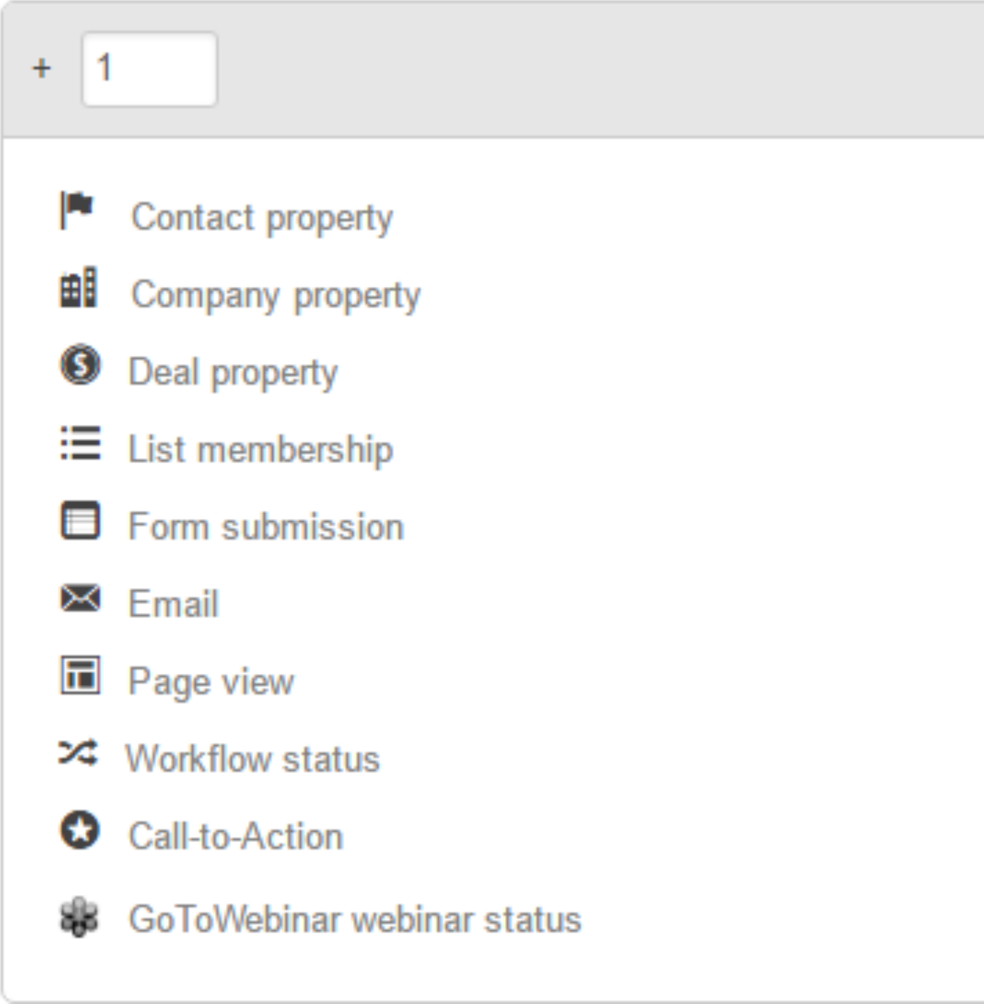
- You can add positive attributes for explicit or activity data.
- You can deduct points for missing data or common spam sources.

13. MANUAL LEAD SCORING IS MAPPED TO THE "HUBSPOT SCORE" FIELD

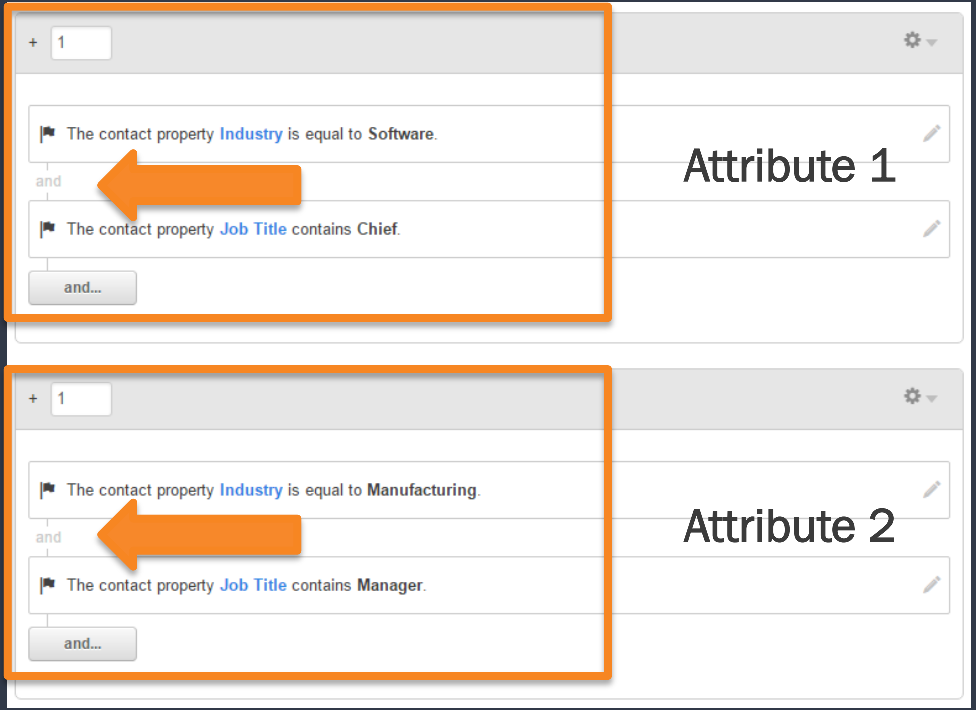
- The HubSpot Score field CANNOT be edited manually.
- It can only be modified via attributes in your lead scoring model.



14. SCORING LOGIC SIMILAR TO WORKFLOW / LIST MEMBERSHIP



15. THERE IS NO "OR" LOGIC IN LEAD SCORING ATTRIBUTES



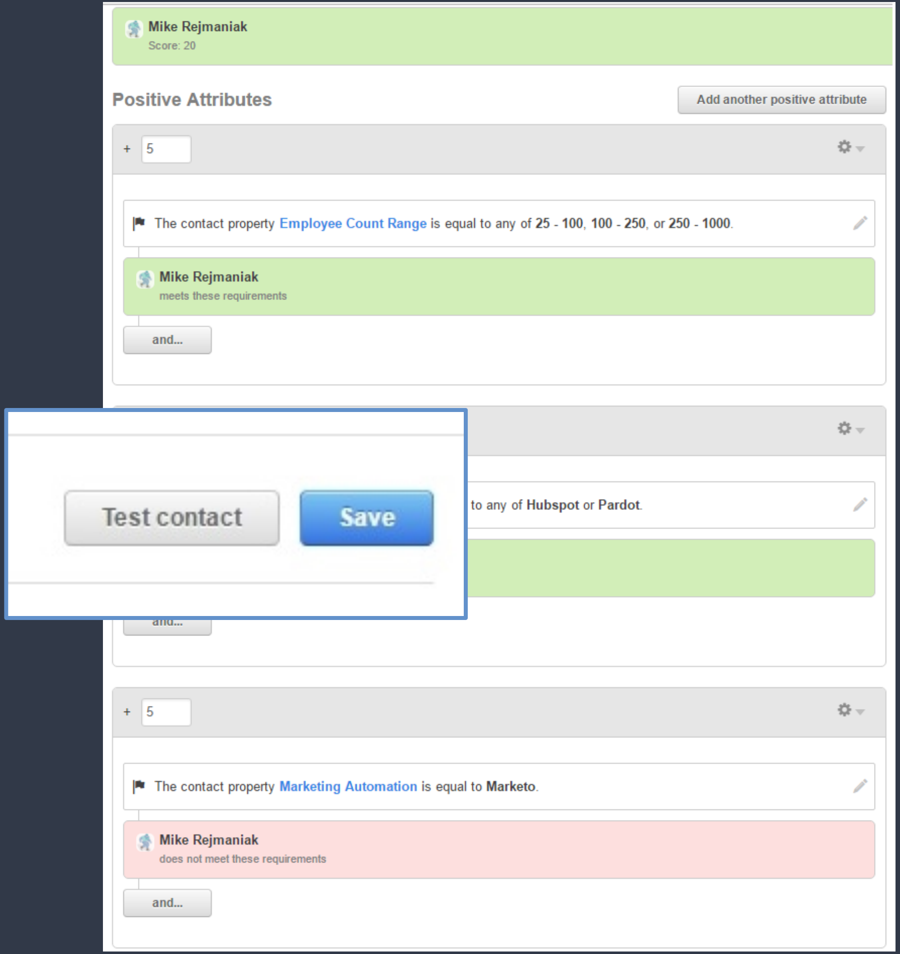
16. HubSpot lead scoring calculates score in real-time

1. When you hit save, your changes will be live and scores will adjust automatically.

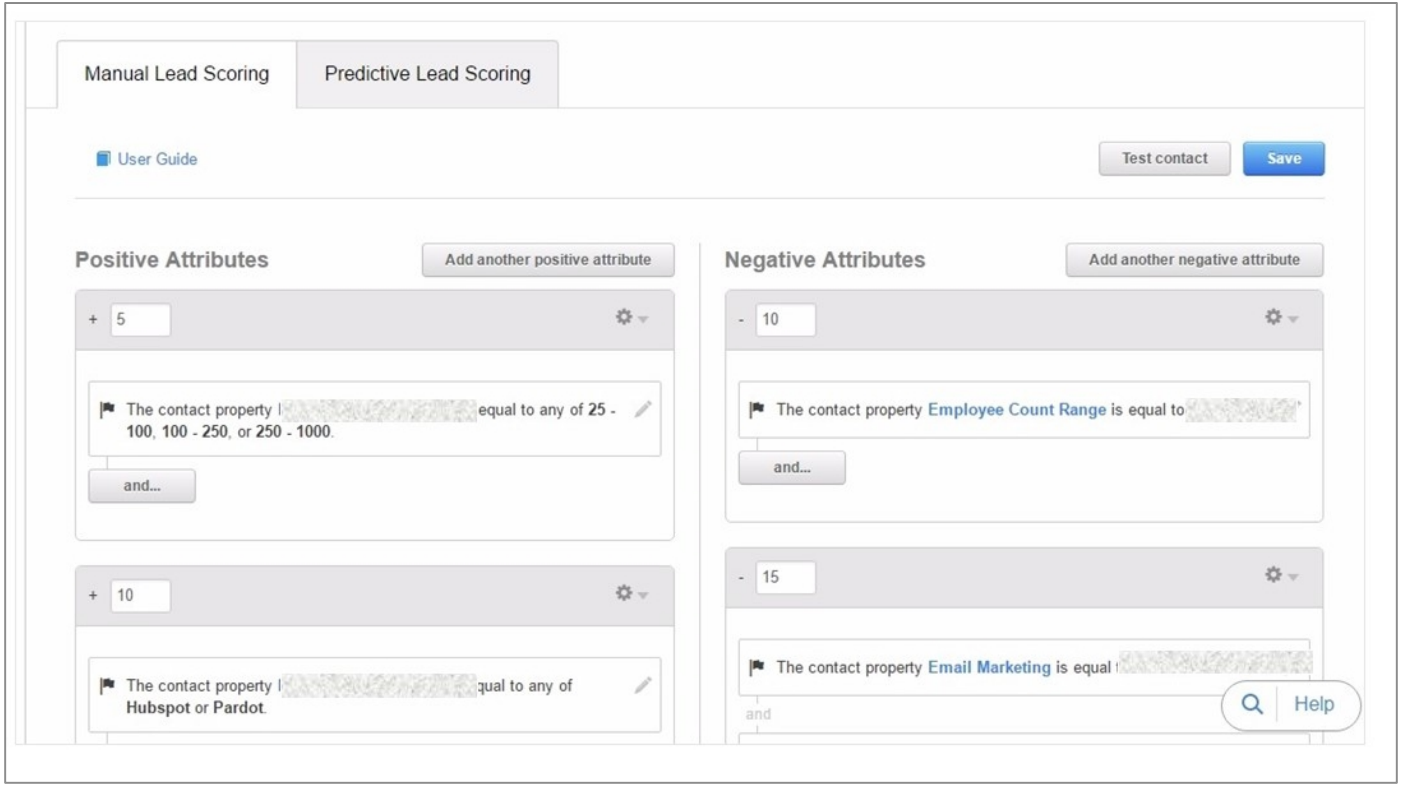
2. Currently there is no draft mode to save a scoring model.

17. UTILIZE HUBSPOT'S "TEST CONTACT" FEATURE

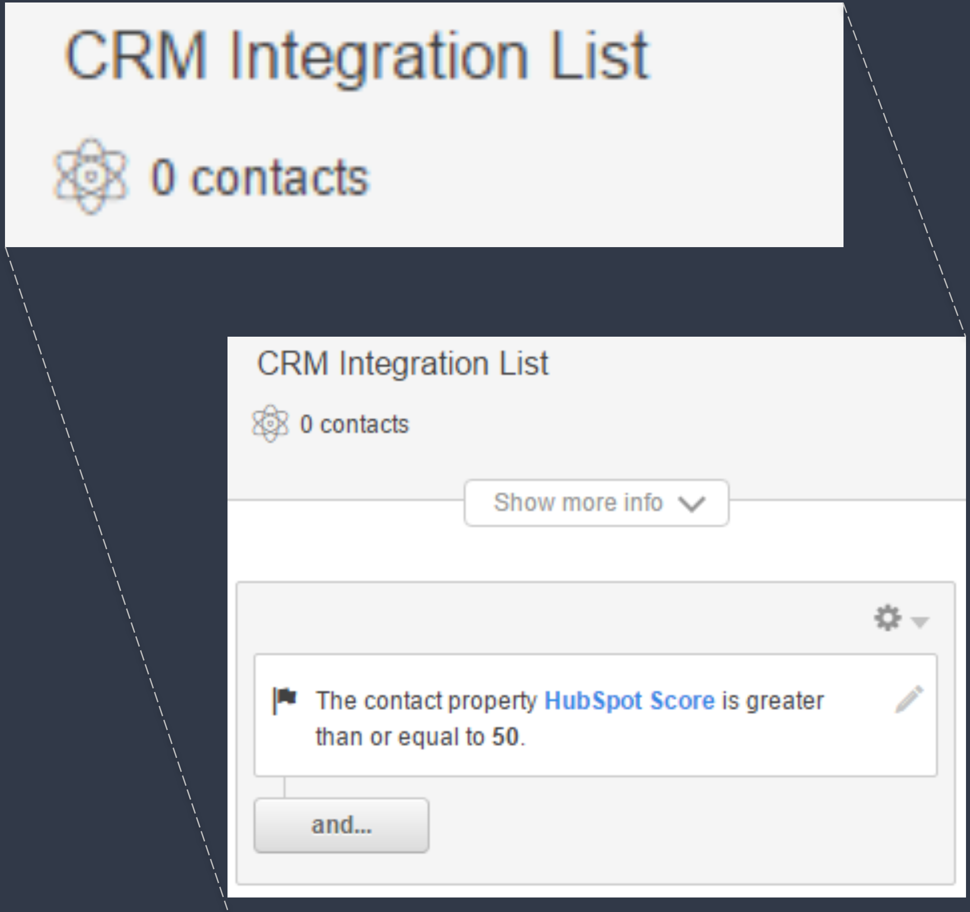
- Great way to test your model against contacts.



18. “Back-up” before large scale edits

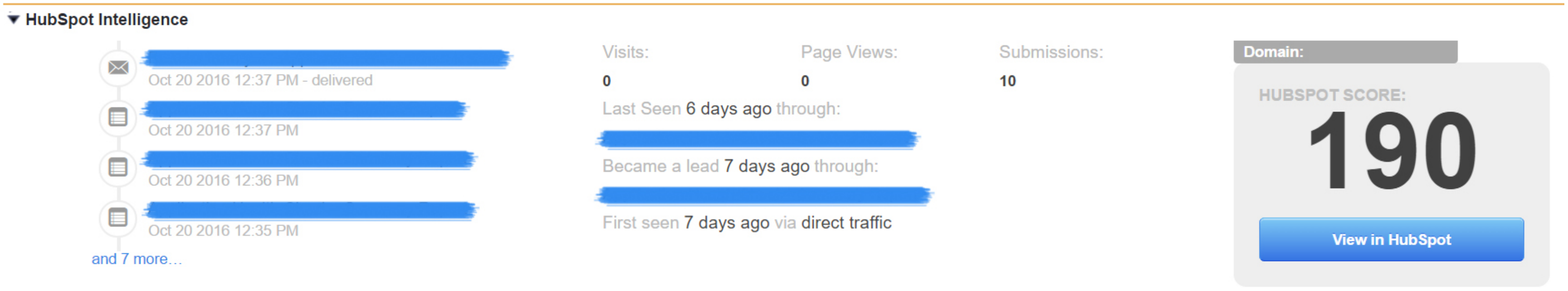


19. IF INTEGRATED WITH CRM, ADD CONTACTS WITH QUALIFYING SCORE INTO INCLUSION LIST



20. Score displays within Lead Intelligence Module

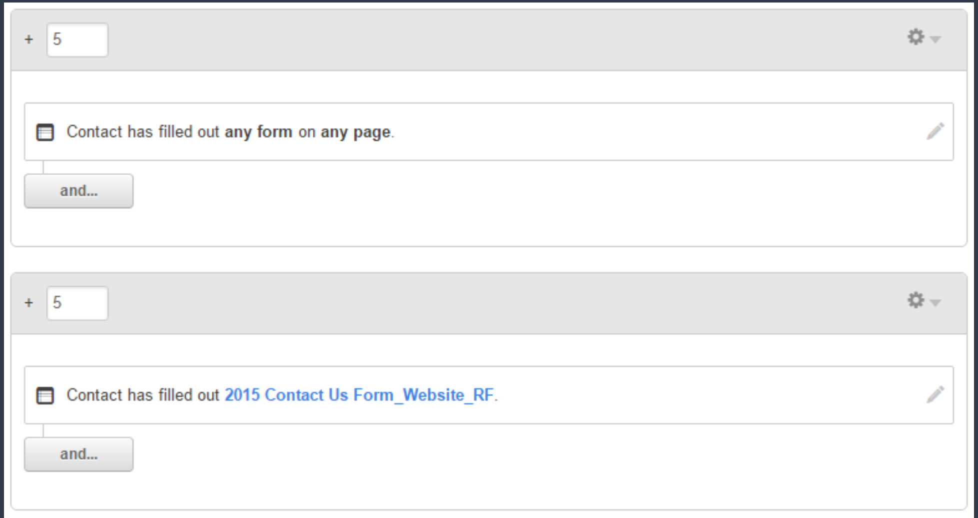
- Improved integration with CRM tools (like Salesforce.com) helps integrate sales/marketing efforts

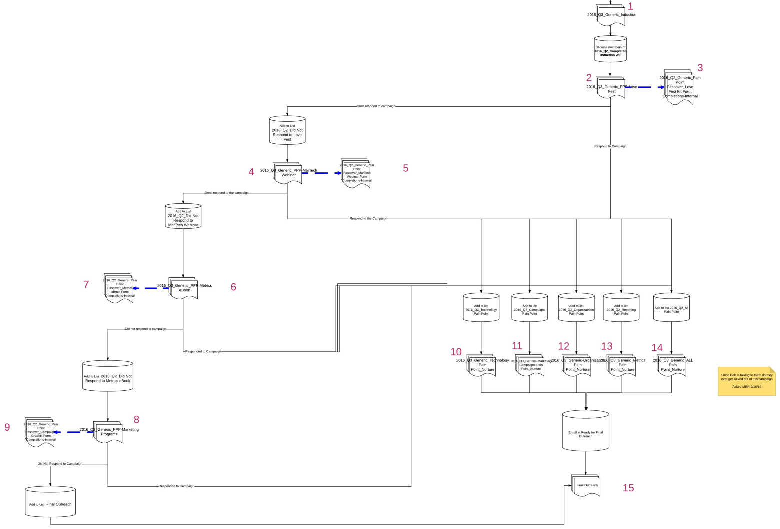


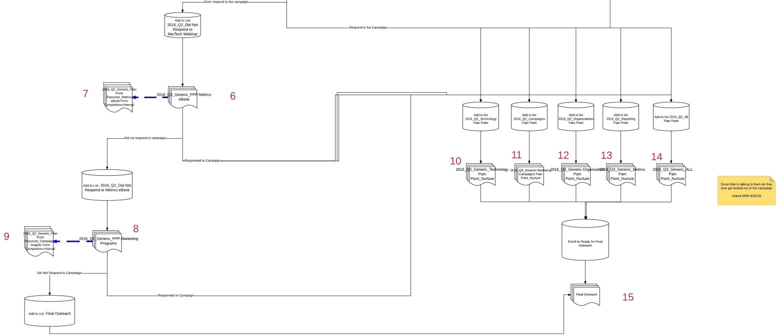
4 | WRAPPING UP: THINGS TO KEEP IN MIND

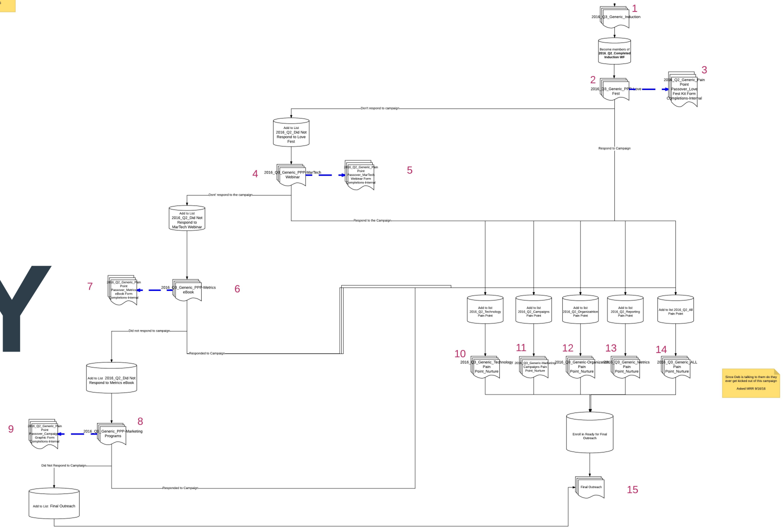
21. MAKE YOUR LEAD SCORING MODEL SELF SUSTAINING

- Limit use of specific form or landing page names









22. CASE STUDY

Building a “low maintenance” lead scoring model

23. THE 4TH SOLUTION TO A PROBLEM WILL MOST LIKELY WORK

- Try to refine your solution 4 times and you will most likely find the droids.
- And, it always helps to geek out with a fellow Jedi…

23½. LEAD SCORING MODELS ARE NOT LIKE RONCO OVENS

- You don’t just “Set it & forget it!”
- Review your scoring model every 3-6 months.
- Make sure you are measuring so you know if it is working.

5 | Q & A & 
Whatchamacallit
Peanut Flavored Crisps! Caramel! Made With Chocolate!
s

THANK YOU.