



23 1/2 TIPS TO MASTER LEAD SCORING

The Hows, The Whos and The
Whatchamacallits

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NICE TO MEET YOU



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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

The screenshot displays the REACHFORCE user interface. At the top, the logo for MEASURED RESULTS MARKETING is on the left, and the REACHFORCE logo is on the right. The page title is "Data Entries" with sub-navigation for "Integrations" and "Salesforce". A green banner indicates "Salesforce Sync is Enabled" with an "ON" toggle and a link to "Learn more by reading the documentation". Below this, the "Salesforce" section is active, showing "Contact Field Mappings" with buttons for "Edit", "Delete", "Convert", "Clone", and "Find Duplicates". The "Lead Detail" section is expanded to show "HubSpot Intelligence" for a lead. It lists three events: "Measured Results Marketing - Marketing" (Apr 25 2016 12:55 PM), "2015 Contact Us Form_Website_RF" (Apr 22 2016 5:35 PM), and "Measured Results Marketing - Marketing" (Apr 22 2016 5:26 PM). Summary statistics show 2 visits, 8 page views, and 1 submission. A "HUBSPOT SCORE" section is partially visible. Below the intelligence, a table maps Salesforce fields to HubSpot fields, such as "City" and "Company Name". At the bottom, the lead's contact information is displayed: "M&S Grill (Keston Town Center)", "Address: M&S Grill 11901 Democracy Drive Reston, VA 20190", and "Phone: 703/787-7766".

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MEASURED RESULTS MARKETING

REACHFORCE

Data Entries

Integrations > Salesforce

HubSpot Integrations

Featured Integrations

Salesforce Sync is Enabled ON

Learn more by reading the documentation

If switched off, we will not sync any information to or from Salesforce.

Salesforce

Contact Field Mappings

Lead Detail

▼ HubSpot Intelligence

Measured Results Marketing - Marketing
Apr 25 2016 12:55 PM

2015 Contact Us Form_Website_RF
Apr 22 2016 5:35 PM

Measured Results Marketing - Marketing
Apr 22 2016 5:26 PM

Visits: 2

Page Views: 8

Submissions: 1

Domain: measuredresultsmark

HUBSPOT SCORE:

View in HubSpot

City city (string)	City city (string)	Use Salesforce value unless blank	Created: Jul 24 2015 8:44 PM Updated: Jul 24 2015 8:44 PM
City city (string)	Mailing City mailingcity (string)	Use Salesforce value unless blank	Created: Jul 24 2015 8:44 PM Updated: Jul 24 2015 8:44 PM
Company Name company (string)	Company company (string)	Use Salesforce value unless blank	Created: Jul 24 2015 8:44 PM Updated: Jul 24 2015 8:44 PM
Country country (string)	Country country (string)	Use Salesforce value unless blank	Created: Jul 24 2015 8:44 PM Updated: Jul 24 2015 8:44 PM

Edit | Del | 16 | Lead: Company CONTAINS

Place: M&S Grill (Keston Town Center)

Address: M&S Grill 11901 Democracy Drive Reston, VA 20190

Phone: 703/787-7766

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.

The screenshot displays a form configuration interface. At the top, the 'Default questions' section lists three fields: 'First Name' (Single-line text), 'Email' (Single-line text), and 'Company Name' (Single-line text). Each field has a three-dot menu icon to its left, and the 'First Name' field has edit, delete, and add icons to its right. A 'Last Name' field is partially visible on the right. Below these is a drag-and-drop area with the text 'Drag fields to add to the default form.' The 'Queued questions' section, highlighted with an orange border, contains two fields: 'Number of Employees' (Dropdown select) and 'Details' (Multi-line text). A help icon is present next to the explanatory text for the queued questions.

Default questions
These appear by default unless marked as smart [🔗](#). Smart rows are hidden once all of their fields have been

1 First Name
Single-line text

2 Email
Single-line text

3 Company Name
Single-line text

⌘ ⌘ Drag fields to add to the default form.

Queued questions
These replace your smart rows [🔗](#) above in the order you choose below. [?](#)

Number of Employees
Dropdown select

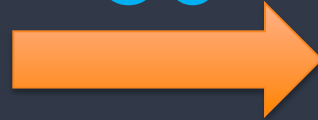
Details
Multi-line text

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

PROSPECT

>50



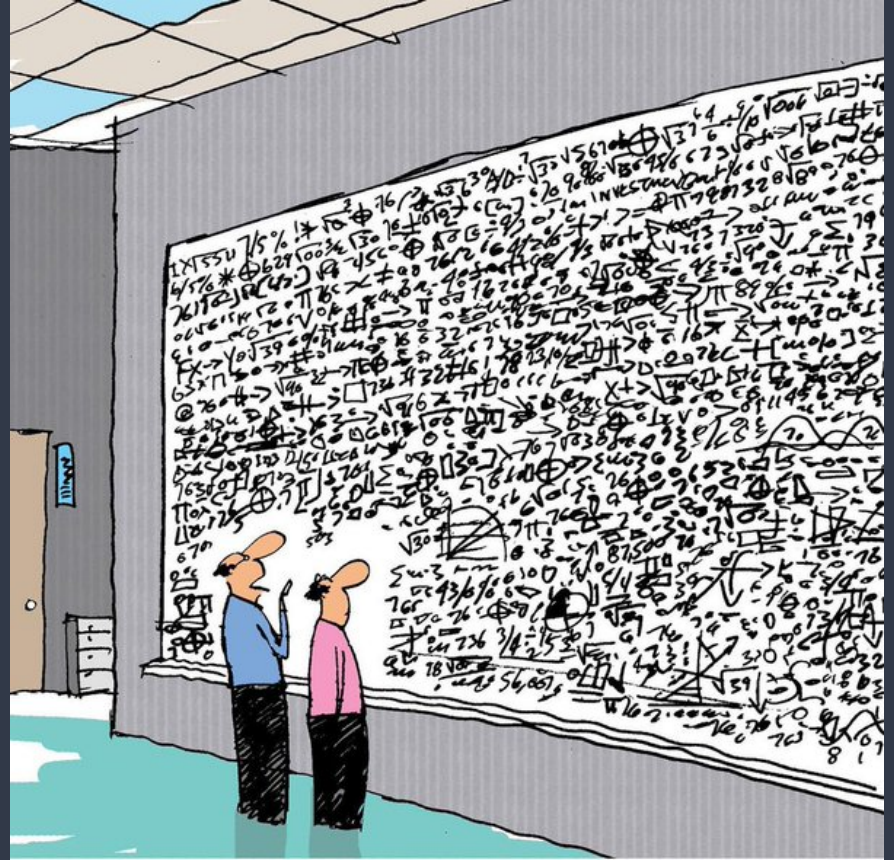
MQL

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

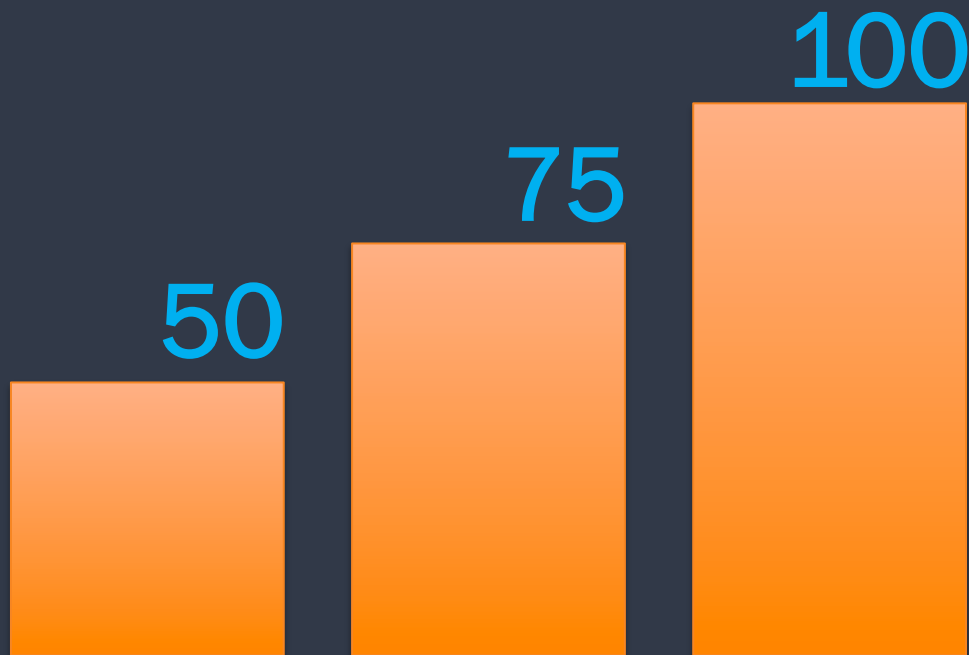
- Like a complex workflow, it's best to map out all your attributes in a document and assign them a score.



“...And that, in a nutshell, is my marketing plan. Any questions?”

10. CASE STUDY

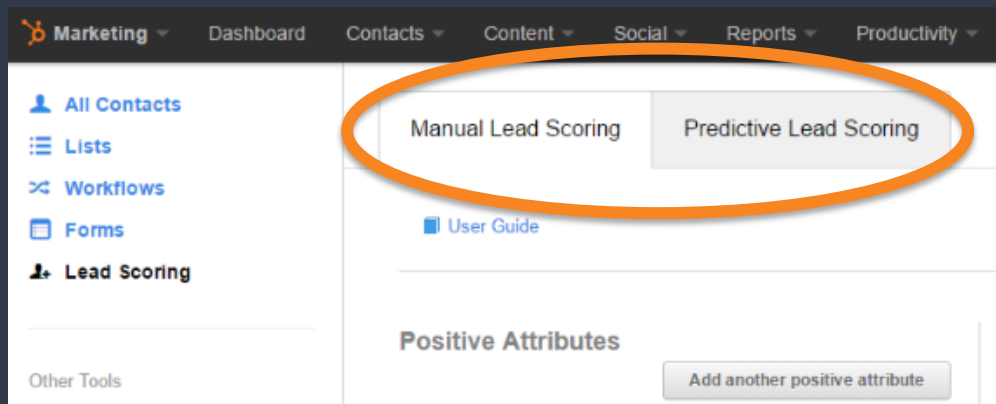
Creating an initial lead scoring model



3 | LEAD SCORING IN HUBSPOT

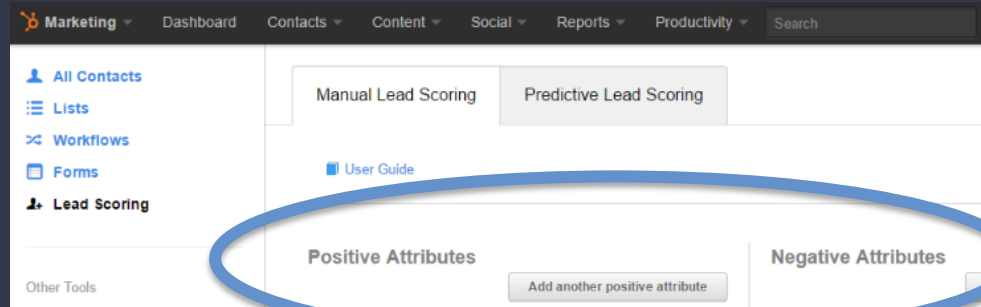
11. PREDICTIVE & MANUAL OPTIONS

- 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.

Search properties...











Hide blank properties

Contact - Hubspot Required

Became a Marketing Qualified Lead Date	04/26/2016 2:17 PM EDT
Company Name	[REDACTED]
Create Date	04/26/2016 2:17 PM EDT
Email	[REDACTED]
First Name	[REDACTED]
HubSpot Score	80
IP Address	[REDACTED]
Job Title	Student
Last Modified Date	04/26/2016 2:35 PM EDT
Last Name	[REDACTED]
Lifecycle Stage	Marketing Qualified Lead

14. SCORING LOGIC SIMILAR TO WORKFLOW / LIST MEMBERSHIP

+ 1

-  Contact property
-  Company property
-  Deal property
-  List membership
-  Form submission
-  Email
-  Page view
-  Workflow status
-  Call-to-Action
-  GoToWebinar webinar status

15. THERE IS NO “OR” LOGIC IN LEAD SCORING ATTRIBUTES

The image displays two examples of lead scoring attributes in a software interface. Each attribute is represented by a card with a plus sign and the number '1' in the top left corner, and a gear icon in the top right corner. The first card, labeled 'Attribute 1' on the right, contains two conditions: 'The contact property Industry is equal to Software.' and 'The contact property Job Title contains Chief.' An orange arrow points to the word 'and' between these two conditions. The second card, labeled 'Attribute 2' on the right, contains two conditions: 'The contact property Industry is equal to Manufacturing.' and 'The contact property Job Title contains Manager.' An orange arrow also points to the word 'and' between these two conditions. Both cards have an 'and...' button at the bottom.

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.

The screenshot displays the HubSpot workflow builder interface. At the top, a contact named 'Mike Rejmaniak' with a score of 20 is shown. Below this, the 'Positive Attributes' section is visible, with a '+ 5' indicator and a gear icon. A rule is defined: 'The contact property Employee Count Range is equal to any of 25 - 100, 100 - 250, or 250 - 1000.' Below the rule, a green bar indicates that 'Mike Rejmaniak meets these requirements'. A modal window is overlaid on the interface, containing a 'Test contact' button and a 'Save' button. Below the modal, another rule is shown: 'The contact property Marketing Automation is equal to Marketo.' Below this rule, a red bar indicates that 'Mike Rejmaniak does not meet these requirements'.

18. “Back-up” before large scale edits

The screenshot displays a lead scoring configuration interface. At the top, there are two tabs: "Manual Lead Scoring" and "Predictive Lead Scoring". Below the tabs, there is a "User Guide" link and two buttons: "Test contact" and "Save".

The interface is divided into two main sections: "Positive Attributes" and "Negative Attributes".

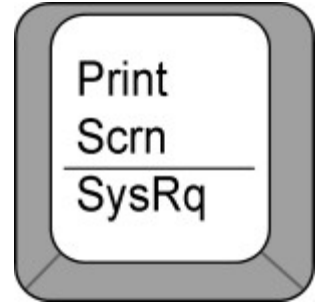
Positive Attributes:

- There is a button "Add another positive attribute".
- The first attribute is a score of +5. The rule is: "The contact property [redacted] is equal to any of 25 - 100, 100 - 250, or 250 - 1000." There is an "and..." button below it.
- The second attribute is a score of +10. The rule is: "The contact property [redacted] is equal to any of Hubspot or Pardot."

Negative Attributes:


- There is a button "Add another negative attribute".
- The first attribute is a score of -10. The rule is: "The contact property Employee Count Range is equal to [redacted]". There is an "and..." button below it.
- The second attribute is a score of -15. The rule is: "The contact property Email Marketing is equal to [redacted]". There is an "and" button below it.

At the bottom right of the interface, there are search and help icons labeled "Q" and "Help".




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

CRM Integration List



 0 contacts

CRM Integration List

 0 contacts

Show more info 



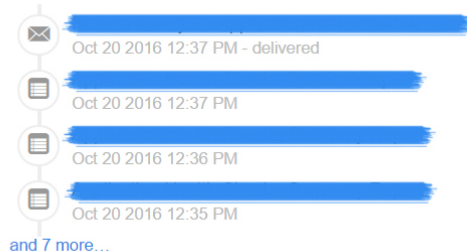
 The contact property **HubSpot Score** is greater than or equal to 50. 

and...

20. Score displays within Lead Intelligence Module

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

▼ HubSpot Intelligence



A vertical timeline of events for a lead. The events are represented by blue bars with icons to their left. The first event is an envelope icon with the text "Oct 20 2016 12:37 PM - delivered". The following three events are document icons with the text "Oct 20 2016 12:37 PM", "Oct 20 2016 12:36 PM", and "Oct 20 2016 12:35 PM". Below the timeline, the text "and 7 more..." is displayed.

Oct 20 2016 12:37 PM - delivered

Oct 20 2016 12:37 PM

Oct 20 2016 12:36 PM

Oct 20 2016 12:35 PM

and 7 more...

Visits:

0

Page Views:

0

Submissions:

10

Last Seen 6 days ago through:

Became a lead 7 days ago through:

First seen 7 days ago via direct traffic

Domain:

HUBSPOT SCORE:

190

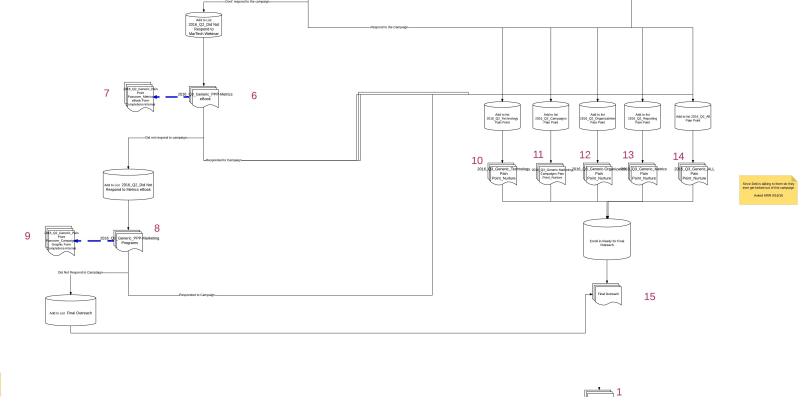
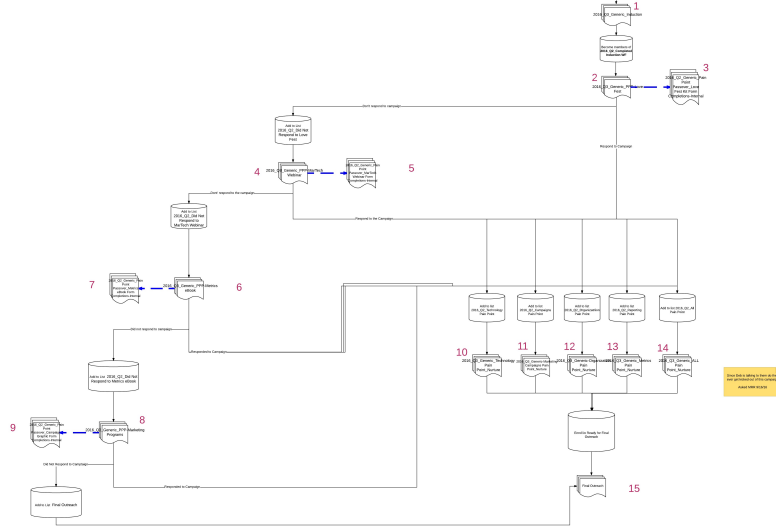
View in HubSpot

4 | WRAPPING UP: THINGS TO KEEP IN MIND

21. MAKE YOUR LEAD SCORING MODEL SELF SUSTAINING

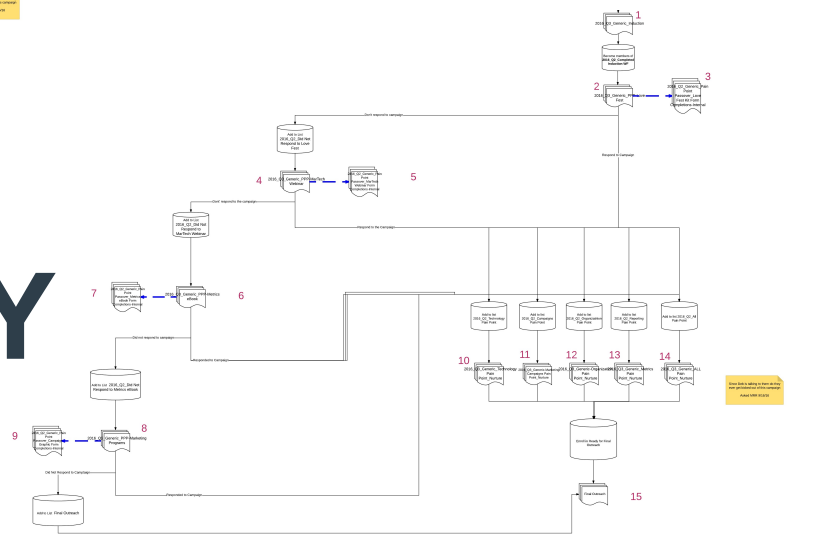
- Limit use of specific form or landing page names

The image shows a screenshot of a lead scoring rule configuration interface. It features two stacked rule cards. Each card has a header bar with a plus sign, a text input field containing the number '5', and a gear icon for settings. The first rule card contains a text box with the text 'Contact has filled out any form on any page.' and a small edit icon. Below the text box is a button labeled 'and...'. The second rule card is identical in structure but contains the text 'Contact has filled out 2015 Contact Us Form_Website_RF.' in the text box.



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...



23^{1/2}. 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 &



S

THANK YOU.