

HubSpot Custom Lead Grader


Registering your App

HubSpot

Dashboard>Create ▾Optimize ▾Promote ▾Convert ▾Analyze ▾Community ▾

Help CenterSettingsLogoff

Marketplace | Lead Grader



HubSpot Professional and Enterprise customers: qualify leads for your sales team more effectively with custom lead grades. The Lead Grader app will calculate a lead's score based on which landing pages they fill out, how they respond to your forms, how often they visit your site, and more. Lead Grader overrides the default HubSpot algorithm for lead scoring, and you can turn it on or off at any time.

Start using Lead Grader today for free. All you need to get started is your HubSpot API key ([register here](#)). Note: API keys are only available to HubSpot Professional and Enterprise customers.

My Info

First Name

Mister

Last Name

User

Email

mister@user.com

My Company

Company

HubSpot Customer

HubSpot API Key

0000000-00000-00000-000-000000

Create My Account

By clicking Sign Up, I have read and agree to the [terms of service](#) and [privacy policy](#).

After installing the Lead Grader app from the HubSpot App Marketplace, you'll be prompted to register with your HubSpot API key. If you don't know your API key, you can [request it here](#).

Adding Grader Criteria

Landing Page Conversion

The screenshot shows the HubSpot Marketplace | Lead Grader interface. At the top, the HubSpot logo is on the left, and navigation links for Dashboard, Create, Optimize, Promote, Convert, Analyze, and Community are on the right. Below the navigation bar, there are links for Help Center, Settings, and Logoff. The main heading is 'Marketplace | Lead Grader'. Below this, a message says 'It's time to add your first criteria!'. A section titled 'Choose a grading criteria:' contains several buttons: 'Landing page conversion' (highlighted in blue), 'Form field response', 'Number of conversions', 'Number of visits', 'Number of pageviews', and 'Found site via'. Below this section, there are two input fields. The first is 'Landing Page URL or Form Name:' with a dropdown menu set to 'Equals' and a text box containing 'http://www.domain.com/my-landing-page'. The second is 'Point Value:' with a text box containing '5'. At the bottom, there are 'Save' and 'Cancel' buttons.

Grading leads by landing page allows you to award points for the forms your leads fill out. For example, a 'contact us' or 'request a quote' form should be more valuable than a 'download whitepaper' form.

You may enter one of the following values in the textbox:

- The title of your landing page
- The URL of your landing page
- The name of your form. This can be useful if you use the same forms across many pages of your site. To find the form name, click 'Form Manager' from your portal's settings page.

Change the dropdown to 'Contains' if, for example, you have multiple form names containing the word 'whitepaper' and you want to score all those forms with the same point value.

Form Field Response

The screenshot shows the HubSpot interface for configuring a lead grader. At the top is the HubSpot logo and a navigation bar with links: Dashboard, Create, Optimize, Promote, Convert, Analyze, and Community. Below this is a sub-header 'Marketplace | Lead Grader'. The main content area starts with the text 'It's time to add your first criteria!'. A section titled 'Choose a grading criteria:' contains several buttons: 'Landing page conversion', 'Form field response' (which is highlighted in blue), 'Number of conversions', 'Number of visits', 'Number of pageviews', and 'Found site via'. Below this, there are three input fields: 'Field Label: (e.g. "Country")' with a dropdown menu, 'Field Response: (e.g. "USA")' with a text input, and 'Point Value:' with a text input. At the bottom of the configuration area are 'Save' and 'Cancel' buttons.

Award points to leads based on their responses to your forms. For example, leads with a title of "CEO" can be scored higher than a title containing "assistant". Think about qualifying questions you can ask on your forms that will help to better prepare your sales reps. Timeframe to make a decision, industry, # of employees, job title, and geographic questions are all great qualifying questions.

Number of Conversions

The screenshot shows the HubSpot Marketplace | Lead Grader interface. At the top is the HubSpot logo and a navigation bar with links: Dashboard, Create, Optimize, Promote, Convert, Analyze, and Community. Below this is a sub-header 'Marketplace | Lead Grader'. The main content area has a heading 'It's time to add your first criteria!'. Underneath, there's a section 'Choose a grading criteria:' with a help icon. It contains six buttons: 'Landing page conversion', 'Form field response', 'Number of conversions' (which is highlighted in blue), 'Number of visits', 'Number of pageviews', and 'Found site via'. Below these buttons are two input fields: 'Number of Conversions:' and 'Point Value:', each with a help icon. At the bottom of the form are 'Save' and 'Cancel' buttons.

As leads re-convert on your website, their chances of converting to a customer increase. You can use lead grader to add points for each time a lead converts.

For example:

- 2 lead conversions add 5 points
- 3 lead conversions add 5 points

If a lead converts twice on your site, they'll get five points. If they convert 4 times on your site, they'll get 10 points. Points are added cumulatively for each criteria that's met.

Number of Visits

The screenshot shows the HubSpot Marketplace | Lead Grader interface. At the top is the HubSpot logo and a navigation bar with links: Dashboard, Create, Optimize, Promote, Convert, Analyze, and Community. Below this is a sub-header 'Marketplace | Lead Grader'. The main content area starts with the text 'It's time to add your first criteria!'. Below this is a section titled 'Choose a grading criteria:' with a help icon. It contains six buttons: 'Landing page conversion', 'Form field response', 'Number of conversions', 'Number of visits' (which is highlighted in blue), 'Number of pageviews', and 'Found site via'. Below these buttons are two input fields: 'Number of Visits:' and 'Point Value:', each with a help icon. At the bottom of the form are 'Save' and 'Cancel' buttons.

As leads visit your website multiple times, their chances of converting to a customer increase. You can add points for each time a lead visits your site.

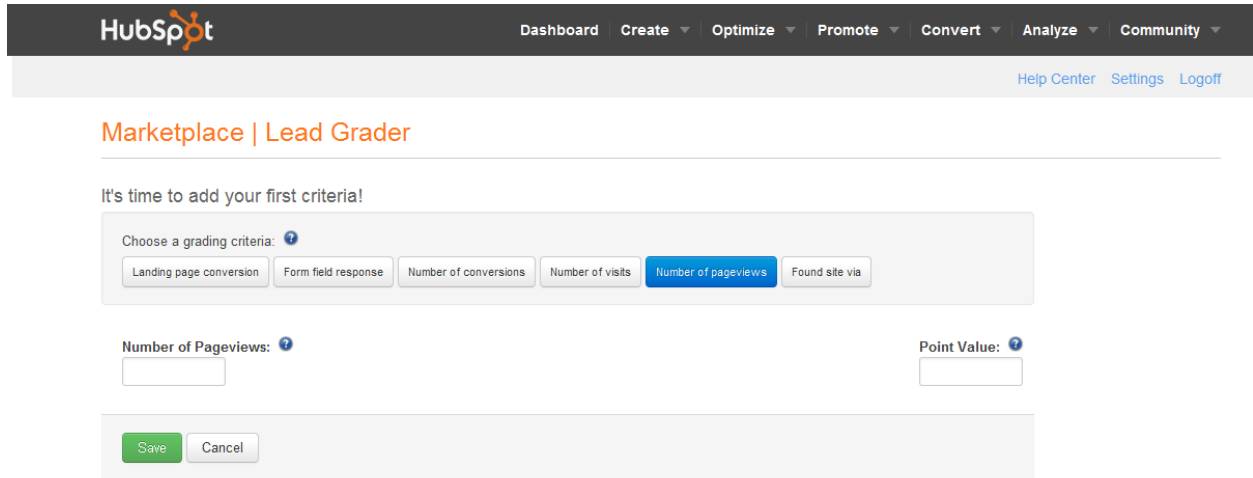
For example:

- 2 visits add 5 points

- 4 visits add 7 points

If a lead visits the site once, they would get no points. If the lead visits the site three times, they would get 5 points. If the lead visited the site 5 times, they would get 12 points.

Number of Pageviews



The screenshot shows the HubSpot Marketplace | Lead Grader interface. At the top is the HubSpot logo and a navigation bar with links: Dashboard, Create, Optimize, Promote, Convert, Analyze, and Community. Below this is a sub-header 'Marketplace | Lead Grader'. The main content area has a heading 'It's time to add your first criteria!'. Underneath, there's a section 'Choose a grading criteria:' with a list of options: Landing page conversion, Form field response, Number of conversions, Number of visits, Number of pageviews (which is highlighted in blue), and Found site via. Below this list, there are two input fields: 'Number of Pageviews:' and 'Point Value:'. At the bottom, there are 'Save' and 'Cancel' buttons.

As leads view more pages on your website, their chances of converting to a customer increase. You can add points based on the number of pageviews that determine a qualified lead. A page view is defined by each page that the lead visits on your site.

For example:

- 5 pageviews add 5 points
- 20 pageviews add 5 more points

If a lead views 2 pages, they would get no points. If the lead views 8 pages, they would get 5 points. If the lead viewed 19 pages, they would also get 5 points. If the lead viewed 20 pages, they would get 10 points.

Found Site Via

The screenshot shows the HubSpot Marketplace | Lead Grader interface. At the top is the HubSpot logo and a navigation bar with links: Dashboard, Create, Optimize, Promote, Convert, Analyze, and Community. Below the navigation bar are links for Help Center, Settings, and Logoff. The main heading is 'Marketplace | Lead Grader'. A message says 'It's time to add your first criteria!'. Below this is a section titled 'Choose a grading criteria:' with a help icon. It contains six buttons: 'Landing page conversion', 'Form field response', 'Number of conversions', 'Number of visits', 'Number of pageviews', and 'Found site via' (which is highlighted in blue). Below this section are two fields: 'Found Site Via:' with a dropdown menu showing 'Organic Search' and a help icon, and 'Point Value:' with a text input field and a help icon. At the bottom are 'Save' and 'Cancel' buttons.

HubSpot

Dashboard Create Optimize Promote Convert Analyze Community

Help Center Settings Logoff

Marketplace | Lead Grader

It's time to add your first criteria!

Choose a grading criteria:

Landing page conversion Form field response Number of conversions Number of visits Number of pageviews Found site via

Found Site Via: Organic Search

Point Value:

Save Cancel

Study your HubSpot Sources report to determine which traffic sources are more effective at converting leads to customers, and assign point values to those traffic sources accordingly. Make sure you have real data to back up your scoring criteria.

Bringing it all together

Marketplace | Lead Grader

Lead Grader is off. Leads are being graded by the default HubSpot algorithm. ☐ OFF

Add New

Grading Criteria	Point Value	
Landing Page or Form contains ebook	10	<button>Edit</button> <button>Delete</button>
Landing Page or Form contains contact us	40	<button>Edit</button> <button>Delete</button>
Number of Pageviews: 5	5	<button>Edit</button> <button>Delete</button>
Number of Pageviews: 10	5	<button>Edit</button> <button>Delete</button>
Number of Pageviews: 15	5	<button>Edit</button> <button>Delete</button>
Number of Visits: 2	5	<button>Edit</button> <button>Delete</button>
Number of Visits: 4	5	<button>Edit</button> <button>Delete</button>
Number of Visits: 6	5	<button>Edit</button> <button>Delete</button>
Landing Page or Form contains download	10	<button>Edit</button> <button>Delete</button>
JobTitle equals CEO	30	<button>Edit</button> <button>Delete</button>
JobTitle contains assistant	-10	<button>Edit</button> <button>Delete</button>
Email contains gmail.com	-20	<button>Edit</button> <button>Delete</button>

In this example we've set up the following logic:

1. Our site contains several ebook forms, so any conversion with the form name 'ebook' scores 10 points.
2. If someone submits a contact form, they're a bottom of the funnel, qualified lead. We give them 40 points.

3. We award 5 points for each 5 pageviews. Our most engaged leads usually visit at least 15 pages.

4. We award 5 points for each 2 visits. Because of our long sales cycle, ongoing webinars and new whitepapers every month, some leads come back to the site 6 or 8 times before they buy. Remember to use empirical data to back up your grading criteria.

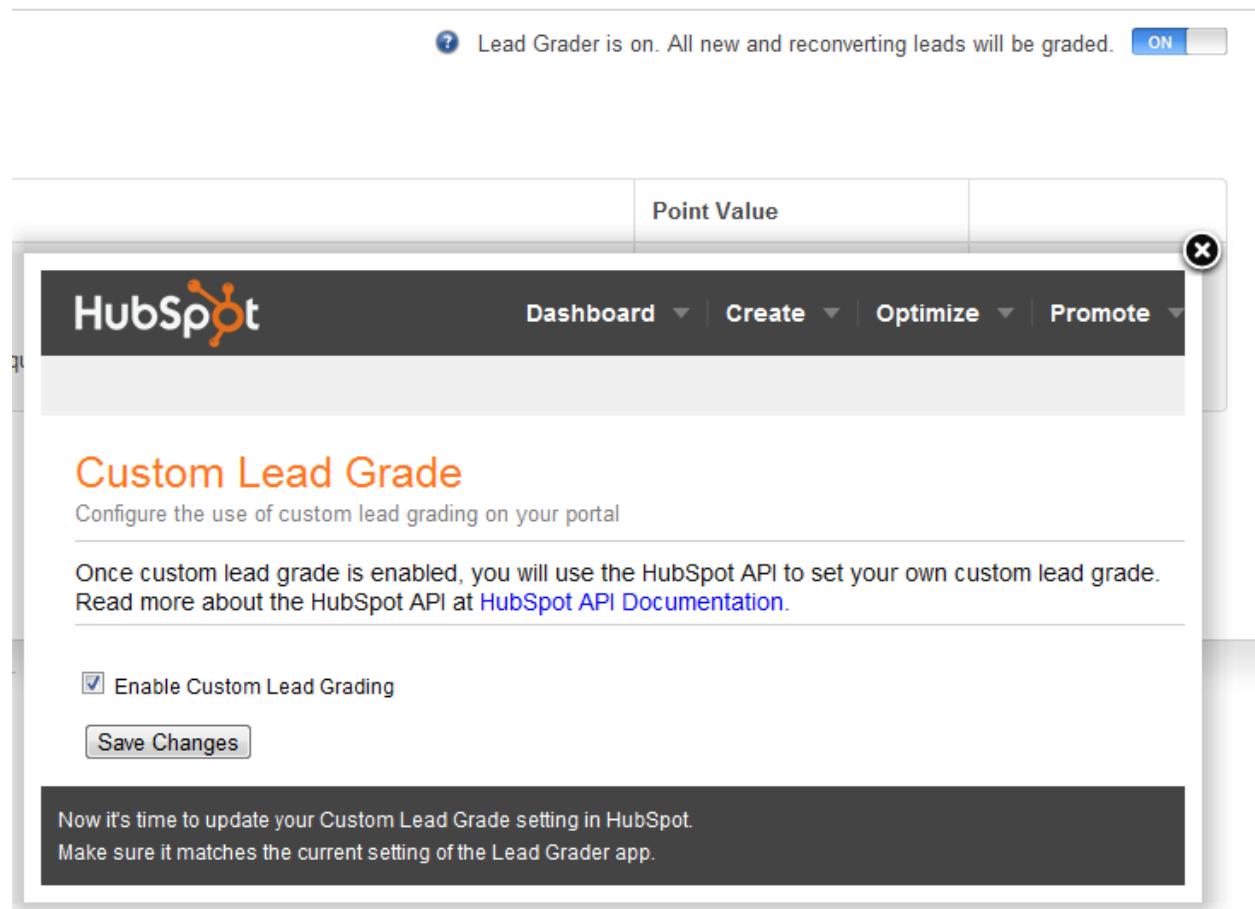
5. If a CEO fills out a form, we award them 30 points.

6. If anyone with 'assistant' in their title fills out a form, we give them negative points. We know that we're less successful selling to assistants, and they may be doing more research than buying.

7. If someone fills out a form with 'gmail.com' in their email address, we give them negative points as well. People who fill out forms with an anonymous gmail address are usually not good leads for us.

In this case, we've identified a score of 50 as our optimal 'qualified lead'. Anyone that has reached that score is qualified enough for a sales rep to contact them.

Turning Lead Grader On and Off



Turning on or off Lead Grader is a two step process. First, click the on/off switch at the upper right of the page. Next, a lightbox window will appear. Update the setting in the HubSpot window to match the setting of the app. These two settings should always be in sync. If you uninstall Lead Grader, make sure you turn off both settings first.

Grading tips

1. There is not a maximum value for the total number of points you can assign a lead. However, we recommend sticking within the 0-100 range.
2. Determine the optimum score that qualifies a lead for your sales team. Change this as needed. After using the app for a few weeks, you should have a good indication that your leads are being scored according to your sales and marketing needs.
3. Leads are graded approximately every 30 minutes. Some analytics data, such as pageviews, visits or traffic source may take longer to score.
4. You can subtract points from leads by putting a negative number in the point value textbox.
5. We love feedback! Click the blue feedback button to send us feature requests or support.