

# Setting Up Predictive Lead Scoring in HubSpot

**\*\*Please save this worksheet to the desktop on your computer.  
This way your progress will be saved correctly as you complete each section.\*\***

Lead scoring is the process of assigning a value to each lead to prioritize outreach, and predictive lead scoring uses machine learning to determine how likely your contacts are to close. By doing the following exercise for you and your team, you can see how the model works with your data to help determine which contacts to prioritize outreach to and create relationships with the right contacts at the right time.

*“Predictive lead scoring is a tool that uses a model to predict who in your database is most likely to become a new customer.”*

## Step 1: Create Filters for Predictive Lead Scoring

Identifying the filters you want to create to evaluate predictive lead scoring will be the first step in analyzing how likely your contacts are to close as delighted customers.

Create your filters or lists using the Likelihood to close contact property to start your evaluation of your leads. By creating these filters or active lists, you'll be able to save and share them with the rest of your team.

Create a filter for the *likelihood* to close property:

1. In your HubSpot navigation menu, navigate to Contacts > Contacts.
2. On the left, click Add filter and select the Likelihood to close property.
3. From this property select is known.
4. Click Apply filter and then click Save.
5. In the dialog box, give your filter a name.
6. For the audience, select Private, Your Team, or Everyone.
7. Click Save.

**\*\*Note: The likelihood to close property will not be known  
for contacts with the lifecycle stage of customer\*\***



Create filter for the **Contact priority** property:

1. In your HubSpot navigation menu, navigate to Contacts > Contacts.
2. On the left, click Add filter and select the Contact priority property.
3. From this property, select is known.
4. Click Apply filter and then click Save.
5. In the dialog box, enter a name for your filter.
6. For the audience, select Everyone.
7. Click Save.

With these two filters, you can now start to evaluate the performance of your predictive lead score.

## Step 2: Evaluating Likelihood to Close

Now that you have your data surfaced, you can start to review your leads and dissect what the data is telling you.

Keep in mind that the percentage you're seeing associated with the Likelihood to close property is calculated based off your data. The more data you have in your CRM, the more insight you can gather from this percentage.

Now it's time to evaluate your data:

1. Select the Likelihood to close property from the column in your filter.
2. Select and click the Likelihood to close column to switch the display to show the highest percentage is at the top.
3. Review the contacts that are pulled to the top and the percentage they are to close.
4. Ask yourself and your team: "Do you think these are good fit leads?"
5. Select and click the Likelihood to close column to switch the display to show the lowest percentage at the top.
6. Review the contacts that are pulled to the top and the percentage they are to close.
7. Ask yourself and your team: "Do you think these are bad fit leads?"
8. Save filters for future use and sharing with additional team members.



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By reviewing these leads, you're seeing how the model uses your data to pull the right leads forward for you to prioritize. You'll also notice how this model de-prioritizes leads that are not a right fit—at least for now.

## Step 3: Review Contact Priority

In addition to the Likelihood to close property, you can also review your contacts by priority. The Contact priority property represents four equally sized tiers of your contacts. Tier 1 will always contain the top 25% of contacts based on close probability.

1. Create a filter for the different tiers.
2. Evaluate the contacts in each tier.
3. Save filters for future use and sharing with additional team members.

## Step 4: Share Filters (Lists) With Team

Now that you've surfaced the data and reviewed how predictive lead scoring is giving you insight into how you want to prioritize your leads, start sharing this data with the rest of your team and other teams.

The key to lead scoring is to help align all your teams around which leads are ready for you to start creating relationships with, helping each of your teams align behind common goals and prioritize the right outreach to the right contacts at the right time.

**Want to explore more on how predictive lead scoring works in HubSpot?**

Check out this article [here](#).

