



Kentico

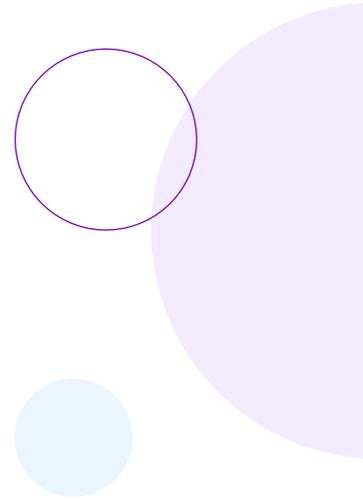


Quick start guide

Lead scoring.

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What is lead scoring?

Lead scoring is the process of assigning points that identify a lead's interest and reflects their location in the sales process. Points are assigned based on an agreement on a commercial level, usually between marketing and sales. They incorporate a combination of demographics, activities, and lead source.

Why do I need lead scoring?

Lead scoring is used to identify sales-ready leads and those that would benefit from additional marketing activities. It is one component of a successful lead nurturing program.

What lead scoring is NOT

Lead scoring is not an activity that is done independently by marketing or sales departments. It should be a continuous joint effort by both departments to define a qualified lead.

Lead scoring – basic techniques

- Align marketing and sales departments to define a sales-ready lead.
- Establish a consistent lead scoring methodology to rank leads.
- Determine a score threshold that will indicate a sales-ready lead.
- Start by assigning lead scoring rules based on attribute data such as demographic information.
- Set up alerts that notify the sales department when a lead score threshold is met.



Lead scoring – advanced techniques

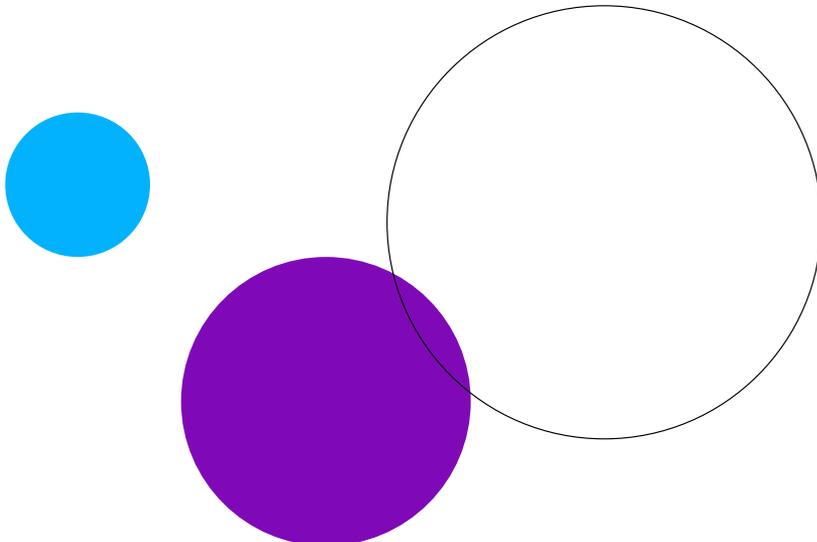
- Assign rules based on activity data such as adding items to a shopping cart and participating in a forum.
- Assign lead scoring rules based on the online behavior of anonymous and known visitors.
- Explore multiple scoring scenarios to gain greater insights into a lead's level of interest in different products or campaigns.
- Define an expiration period for scores that match the sales cycle.

Lead scoring optimization

- Review scoring and criteria to provide the most accurate score possible.
- Review the score of won and lost opportunities to verify they were what was expected for top prospects.
- Review leads with high scores that did not turn into opportunities. How can the scoring be improved?
- Review contacts' online behavior to see if their actions are really demonstrating the best leads and are being reflected properly in the score.

Top resources

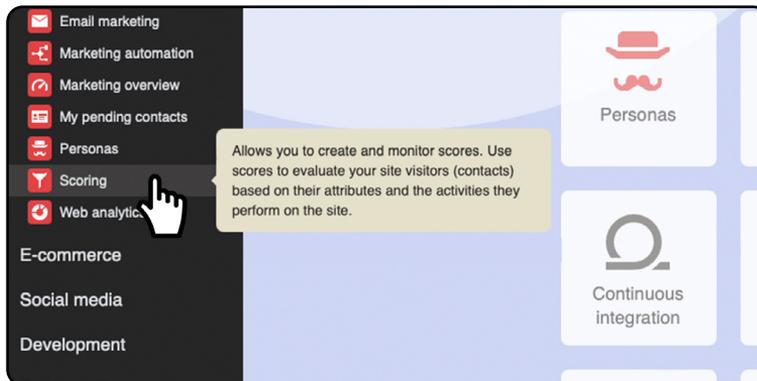
[Identify high-quality leads with automated lead scoring](#)



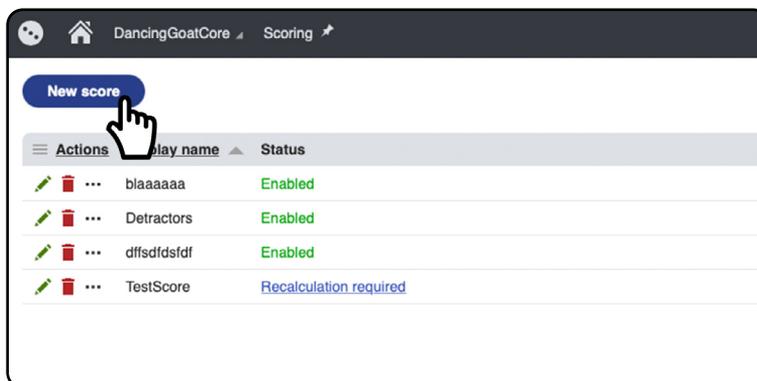
Lead scoring in Kentico Xperience 13.

You can set up scoring for your website in the Scoring application.

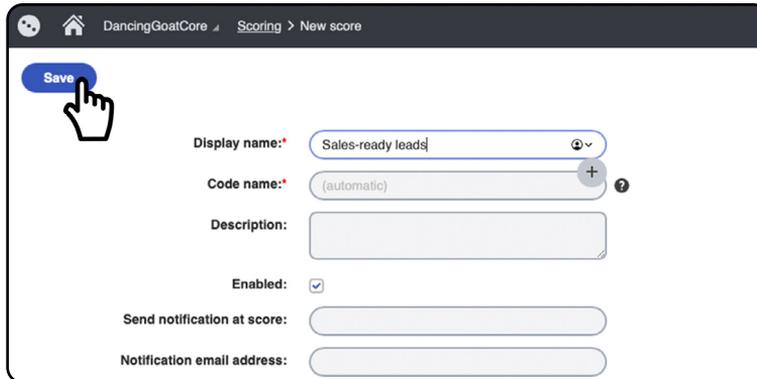
1. In the administration interface, open the Applications list and click **Scoring** under the Online Marketing category.



2. You can now create a new score by clicking the **New Score** button.



3. Enter your score name in the Display name field and click Save.

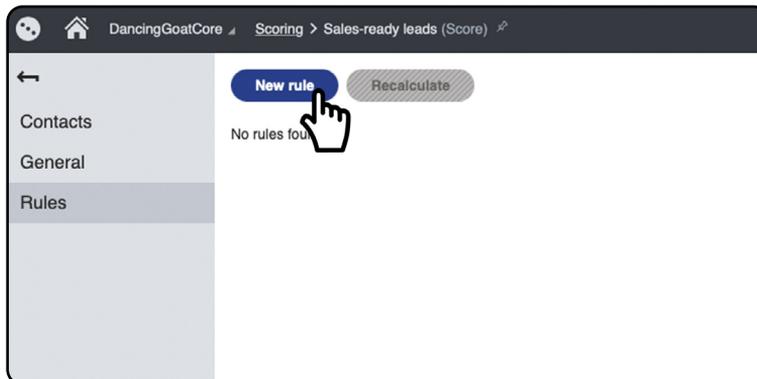


The screenshot shows the 'New score' configuration page in the Kentico interface. The breadcrumb trail is 'DancingGoatCore > Scoring > New score'. A blue 'Save' button is highlighted with a hand cursor. The form contains the following fields:

- Display name:** A text input field containing 'Sales-ready leads'.
- Code name:** A dropdown menu showing '(automatic)'.
- Description:** A large empty text area.
- Enabled:** A checked checkbox.
- Send notification at score:** An empty text input field.
- Notification email address:** An empty text input field.

You can now start creating your scoring criteria and distribute points amongst them.

4. Select the Rules tab and click New rule.

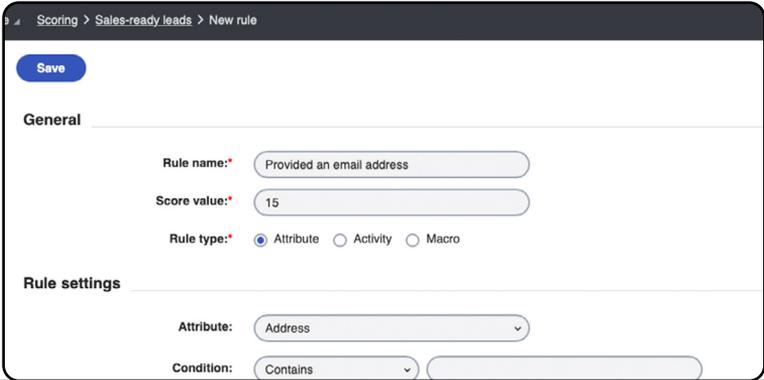


The screenshot shows the 'Sales-ready leads (Score)' page in the Kentico interface. The breadcrumb trail is 'DancingGoatCore > Scoring > Sales-ready leads (Score)'. A left-hand navigation menu is visible with the following items: 'Contacts', 'General', and 'Rules' (which is highlighted). In the main content area, a blue 'New rule' button is highlighted with a hand cursor, and a grey 'Recalculate' button is also visible. Below the buttons, the text 'No rules found' is displayed.

You can create three types of rules in Kentico: Attributes, Activities, and Macro rules.

What Is an Attribute-Based Rule?

Attributes are typically based on information provided by website visitors via online forms, such as their Telephone Number, Email, or Job Title. You can either use built-in attributes or create your own ones.



The screenshot shows a web interface for creating a new rule. At the top, there is a breadcrumb trail: "Scoring > Sales-ready leads > New rule". A blue "Save" button is located in the top left corner. The form is divided into two main sections: "General" and "Rule settings".

General

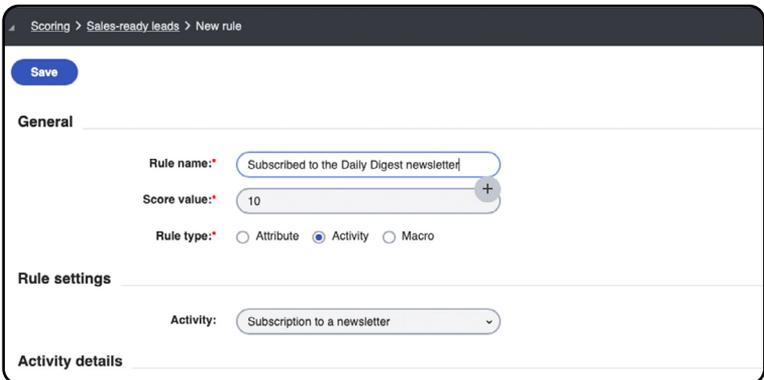
- Rule name:** A text input field containing "Provided an email address".
- Score value:** A numeric input field containing "15".
- Rule type:** Three radio buttons: "Attribute" (selected), "Activity", and "Macro".

Rule settings

- Attribute:** A dropdown menu with "Address" selected.
- Condition:** A dropdown menu with "Contains" selected.

What Is an activity-based rule?

These rules are based on activities that the user completed on the website or in your emails, such as Page Visit, Newsletter Subscription, or Form Submission. Again, you can either use built-in or custom activities.



The screenshot shows a web interface for creating a new rule. At the top, there is a breadcrumb trail: "Scoring > Sales-ready leads > New rule". A blue "Save" button is located in the top left corner. The form is divided into two main sections: "General" and "Rule settings".

General

- Rule name:** A text input field containing "Subscribed to the Daily Digest newsletter".
- Score value:** A numeric input field containing "10", with a "+" button to its right.
- Rule type:** Three radio buttons: "Attribute", "Activity" (selected), and "Macro".

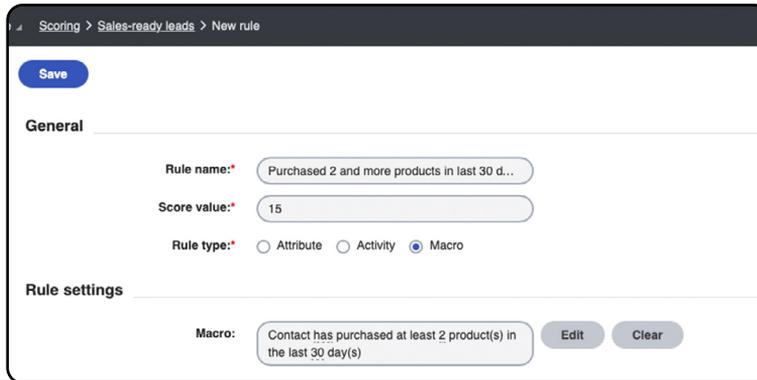
Rule settings

- Activity:** A dropdown menu with "Subscription to a newsletter" selected.

Activity details

What Is a macro-based rule?

Macros are based on a dynamic condition, thus they help you define more complex rules, combining multiple Attributes and/or Activities.



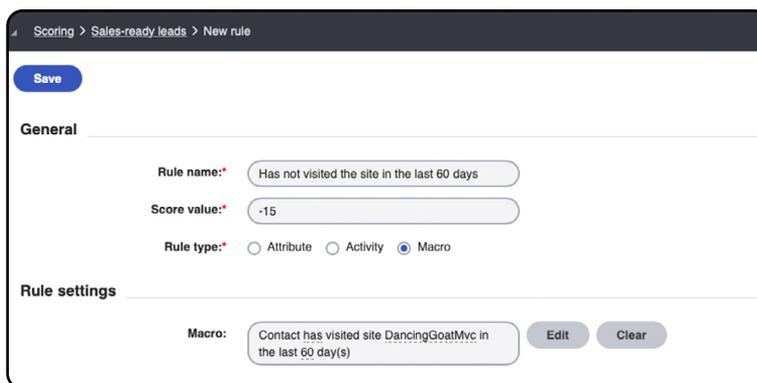
The screenshot shows a web interface for creating a new rule. The breadcrumb path is "Scoring > Sales-ready leads > New rule". A blue "Save" button is at the top left. The "General" section contains the following fields:

- Rule name:** Purchased 2 and more products in last 30 d...
- Score value:** 15
- Rule type:** Attribute Activity Macro

The "Rule settings" section contains a "Macro" field with the text: "Contact has purchased at least 2 product(s) in the last 30 day(s)". To the right of this field are "Edit" and "Clear" buttons.

Not desired characteristics or behavior

In Kentico, not only can you create rules that will add points for a desired behavior but you can also deduct points for unwanted characteristics or actions.

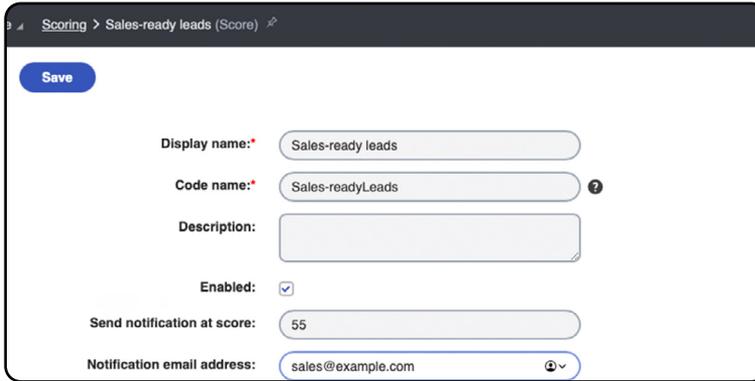


The screenshot shows a web interface for creating a new rule. The breadcrumb path is "Scoring > Sales-ready leads > New rule". A blue "Save" button is at the top left. The "General" section contains the following fields:

- Rule name:** Has not visited the site in the last 60 days
- Score value:** -15
- Rule type:** Attribute Activity Macro

The "Rule settings" section contains a "Macro" field with the text: "Contact has visited site DancingGoatMvc in the last 60 day(s)". To the right of this field are "Edit" and "Clear" buttons.

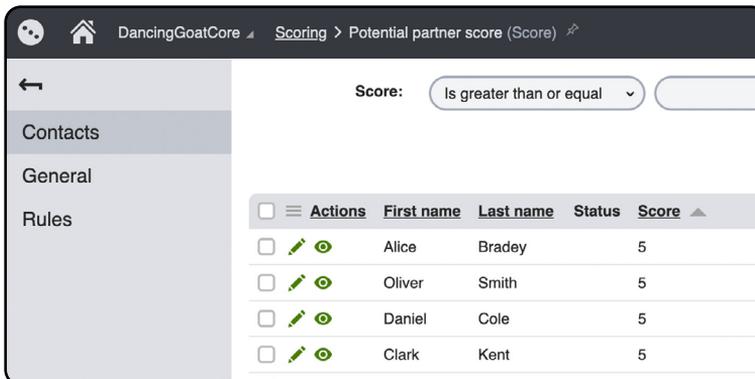
Once you created all your scoring rules you can now return back to the **General** tab. In the **Send notification at score** field, you set the minimum number of score points that a contact needs to reach so they are considered as sales-ready.



The screenshot shows a configuration form for a scoring rule named "Sales-ready leads (Score)". The form includes a "Save" button at the top left. The fields are: "Display name:" with the value "Sales-ready leads"; "Code name:" with the value "Sales-readyLeads"; "Description:" which is empty; "Enabled:" with a checked checkbox; "Send notification at score:" with the value "55"; and "Notification email address:" with the value "sales@example.com".

Your scoring system is now ready to score your contacts based on the rules you created.

You can see your contacts and the score they obtained on the **Contacts** tab.



The screenshot shows a list of contacts under the "Potential partner score (Score)" rule. The "Score" filter is set to "Is greater than or equal". The table below shows the results:

<input type="checkbox"/>	Actions	First name	Last name	Status	Score
<input type="checkbox"/>		Alice	Bradey		5
<input type="checkbox"/>		Oliver	Smith		5
<input type="checkbox"/>		Daniel	Cole		5
<input type="checkbox"/>		Clark	Kent		5

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