Kentico

Quick start guide

Lead scoring.

kentico.com

Contents.

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.

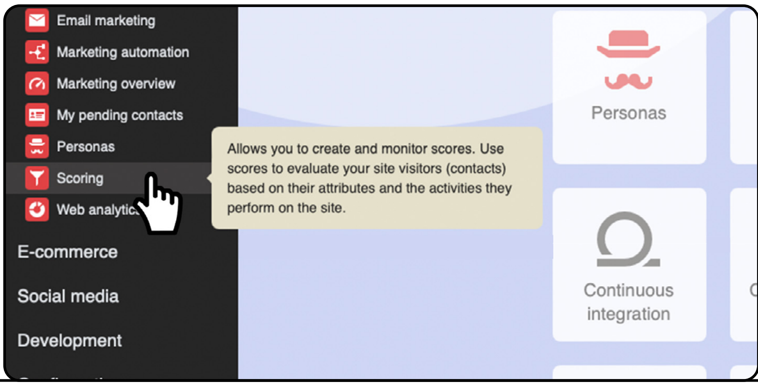
Top resources

Identify high-quality leads with automated lead scoring

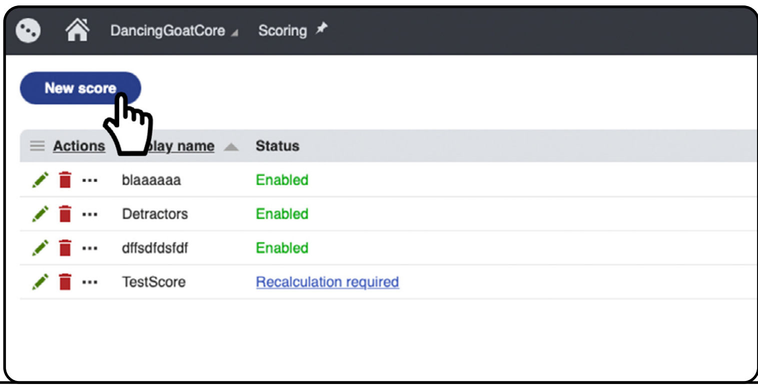
Lead scoring in Kentico Xperience 13.

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

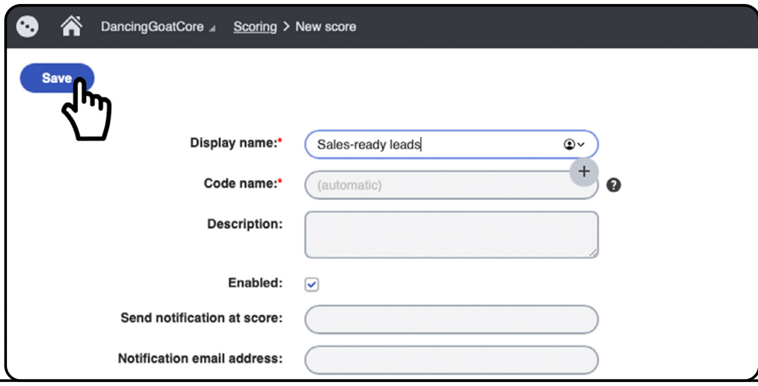
1. In the administration interface, open the Applications list and click **Scoring** under the Online Marketing category.



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

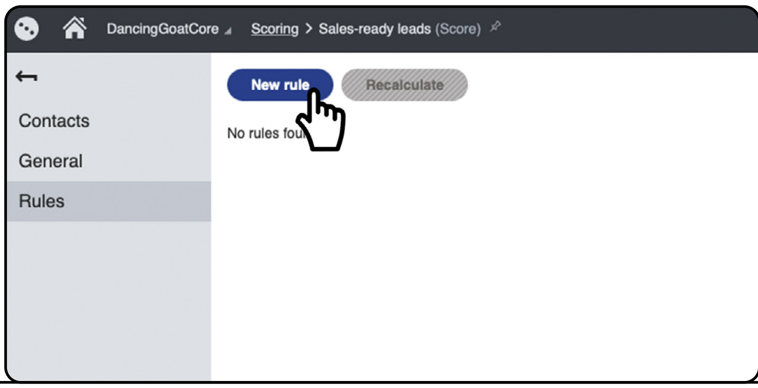


3. Enter your score name in the Display name field and click Save.



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

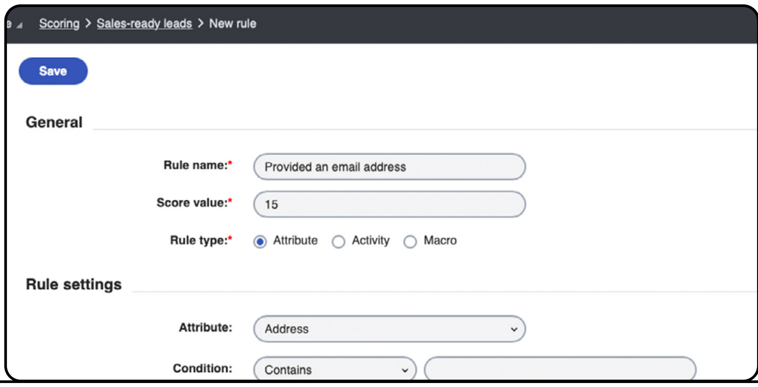
4. Select the Rules tab and click New rule.



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

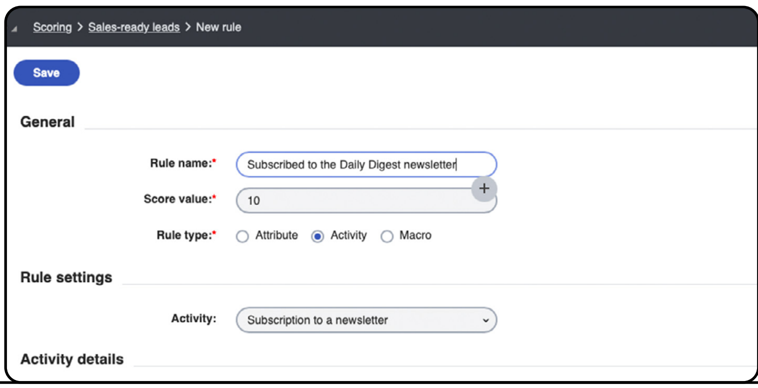
What Is an Attribute-Based Rule?

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.



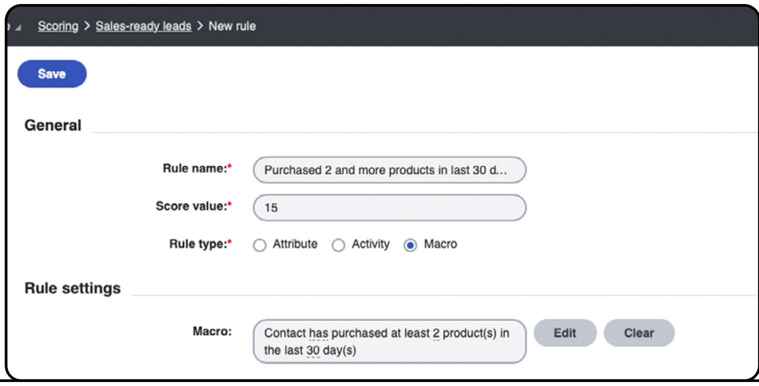
What Is an activity-based rule?

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.



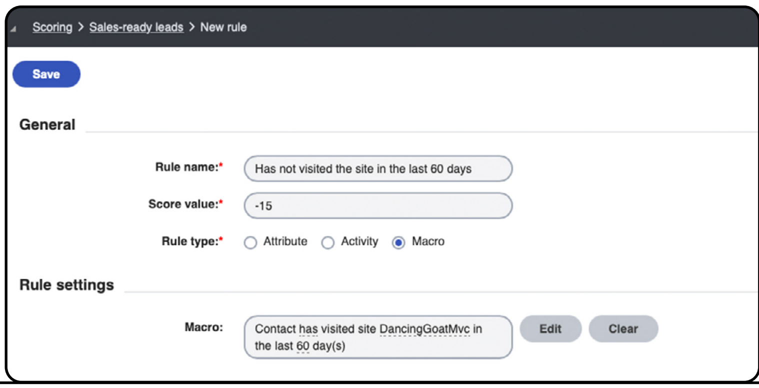
What Is a macro-based rule?

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

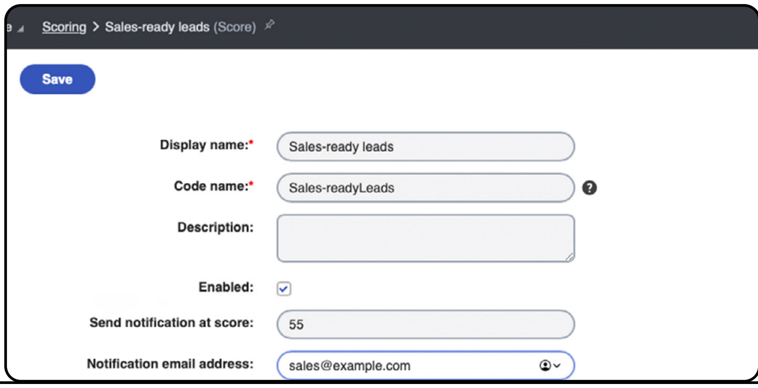


Not desired characteristics or behavior

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.

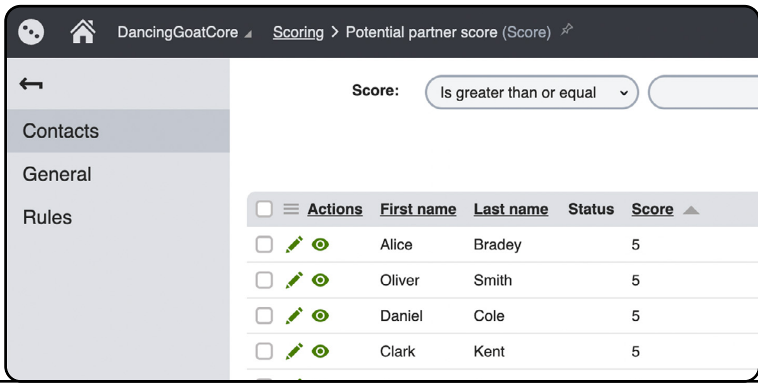


Once you created all your scoring rules you can now return back to the **General** tab. In the **Send notificiation at score** field, you set the minimum number of score points that a contact needs to reach so they are considered as sales-ready.



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 DXP that helps you grow.

kentico.com