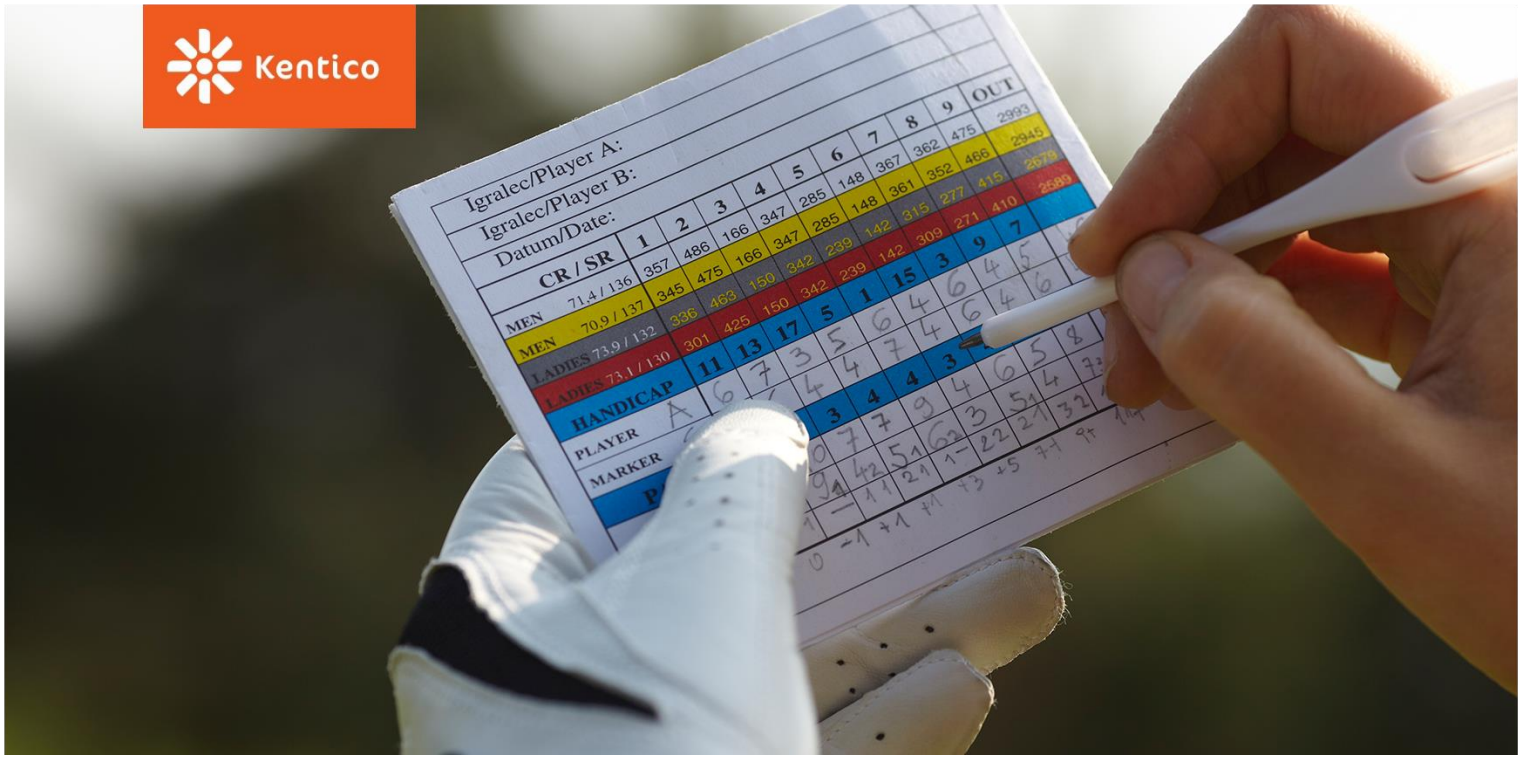


Kentico Lead Scoring

A Practical Guide to Setting Up Scoring and Its Rules in Kentico

www.kentico.com

Lead scoring is a great lead management tool that helps marketers classify their website visitors according to the demographical data and their behavior on a website. It helps maximize the efficiency of the sales team who will not have to spend more time cold-calling and, rather, focus only on sales-ready leads.

Even though it is a powerful tool, and lately there has been a lot of buzz around lead scoring, unfortunately, many companies still do not score their website visitors at all, or if they do, they don't do it right.

This material should help you understand the steps you need to take to set up your lead scoring in Kentico. It shows you how to create scoring criteria and work with a score threshold, and, most importantly, it provides you with a list of the most frequent rules we helped our customers to set up on their websites.

This Lead Scoring guide is divided into two sections:

1. Setting Up Lead Scoring in Kentico

This section will help you understand the type of rules you can work with in Kentico, how to create new rules, and where to set up the score threshold and notification emails.

2. Creating Most Frequent Rules, Step by Step

Once you are familiar with Kentico Lead Scoring, it is time to set up individual rules. This section provides an extensive list of the most used rules we have encountered when working on our clients' projects. The list can serve as an inspiration in case you have not defined any scoring criteria yet. Some of them may be applicable to your scenarios too.

So, as you can see, this Lead Scoring guide is focused on setting up Lead Scoring in the Kentico platform. If you are not there yet and you need to start with the basics first, it is recommended that you read through the following article, Lead Scoring Step by Step. It will help you to do your initial research, define the criteria, and determine the score threshold before you jump into Kentico and start setting it up.

Below, are other materials that will help you understand the concept of lead scoring, its benefits, and the reasons why you should start scoring visitors on your website.

- Video: What is Lead Scoring, and How Do I Use It?
- Whitepaper: Lead Scoring for Success Guide
- Quick Start Guide: Lead Scoring

Setting Up Scoring in Kentico

Thanks to Kentico, you will be able to put away your scoring system sketched on a paper and transform it into a digital one. Kentico Lead Scoring allows you to score and re-score your leads automatically based on their profile characteristics and behavior on your website, in real time. The re-scoring process is triggered automatically by each action of the website visitor.

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

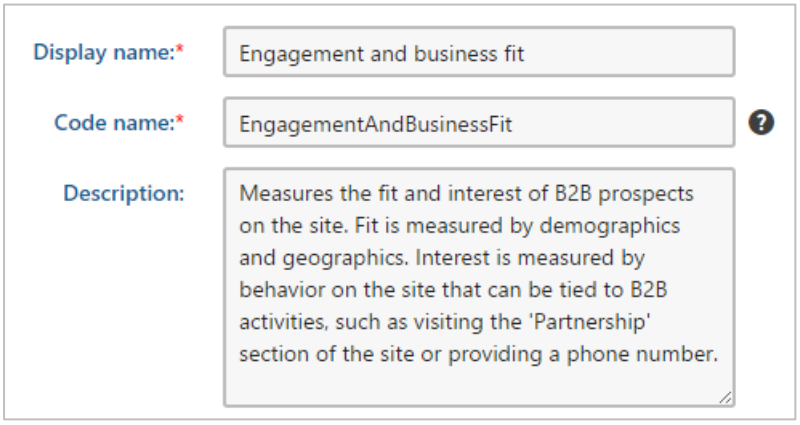
There are a couple of **documentation articles** that we would recommend to you, to understand all the details of Kentico Lead Scoring.

- Scoring Contacts
- Managing Contact Scores

Follow these basic steps to set up Lead Scoring in Kentico:

1. **Set Your Score Name**

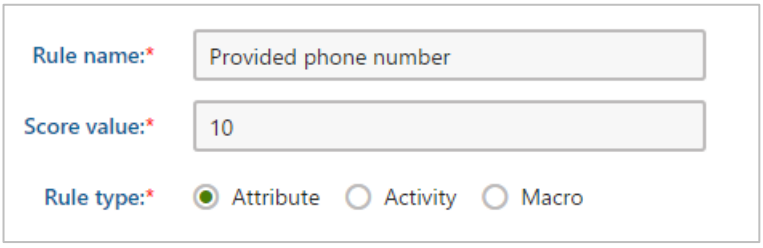
First, you need to set your score name, e.g. *Hot leads*, *Sales-ready contacts*, *Profile, and Behavior fit*, and a short description providing more information on who you are looking for with this score.



2. Create Rules for Your Score

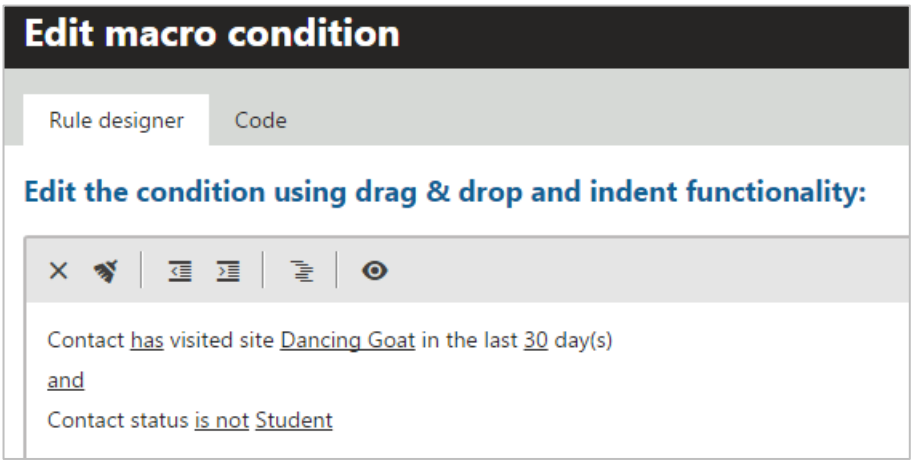
Based on your initial research, you have put together a list of your scoring criteria and distributed points amongst them. Now, it is time to take your notes and transform those criteria into Kentico rules.

The most important thing to understand before you begin is that you can create three different types of rules in Kentico – Attributes, Activities and Macro rules.



- **Attributes** are typically based on information provided by website visitors via online forms, such as their Telephone Number, Email Address, or Job Title.
- **Activities** allow you to specify activities performed by website visitors, such as Newsletter Subscription, Page Visit, or Form Submission. You can set recurrence for all Activity rules. That means your contacts can score higher for doing the same activity multiple times.
- **Macros** will help you define more complex rules, combining multiple Attributes and/or Activities. If you cannot find the rule you are looking for amongst options for Attributes or Activities, have a look at the Macros rules. You will probably find it there.
  A great advantage of using macros is that you can combine multiple rules in one, using AND/OR operators in between them. You can also change the meaning of a sentence from positive to negative by changing the verb format. Have a look

at the following picture demonstrating the AND operator in between two conditions and the negative format of the second sentence.



Learn more about working with macro rules in our documentation article, Building Conditions Using Macro Rules.

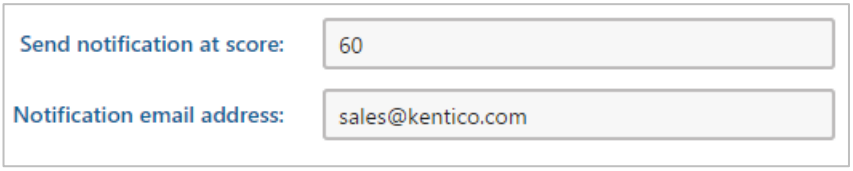
If the list of prepared macros does not provide a rule you're looking for, developers can always create custom rules for you by following the steps in our documentation article, Creating Macro Rules.

The following chapter provides a list of the most used rules we saw in our customers' projects and how to set them up in Kentico.

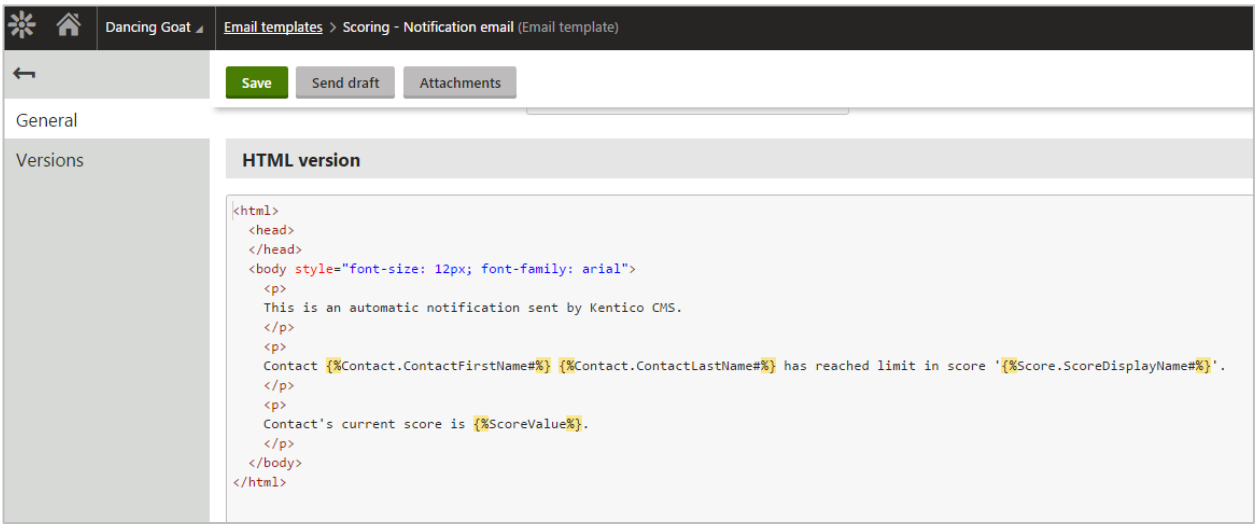
3. Set the Score Threshold

Your research helped to determine the number of points that leads need to reach so they are classified as sales-ready.

The only thing that remains is to set this number in the **"Send notification at"** field and specify the email address where an email message will be sent every time a contact on your website reaches the threshold. In case you want to set multiple email addresses for your email notifications, use a semicolon with no space in between them.



You can have a look and/or change the text of such an email notification in the **Email Templates** application. After selecting *(global)* site in the upper right corner search for an email template called *Scoring – Notification email*.



Creating Most Frequent Rules, Step by Step

What follows is a list of scoring rules we frequently get asked about. That's why we decided to demonstrate how these can be achieved in Kentico. This should make it easier for you to launch your Lead Scoring system as soon as possible.

For better clarity and for the purpose of this material, we have divided them into three categories—**Attributes**, **Activities**, and **Negative rules**. Each category then contains rules, divided into subcategories depending on the nature of the rule.

Feel free to click on the following subcategories to jump into the corresponding rules.

Attributes	Activities	Negative rules
Company information	Traffic sources	No visits to the website
Email address	Page visits	Personal email address
Location	Newsletters and emails	Email unsubscriptions
Status	Form submissions	
Custom fields	Purchases	
	On-site search	

Attributes

Attribute rules are typically based on information provided by website visitors via online forms, such as their Telephone Number, Email Address, or Job Title. Attributes help you understand how well website visitors fit your business, who they are, and how engaged they are with whatever you do.

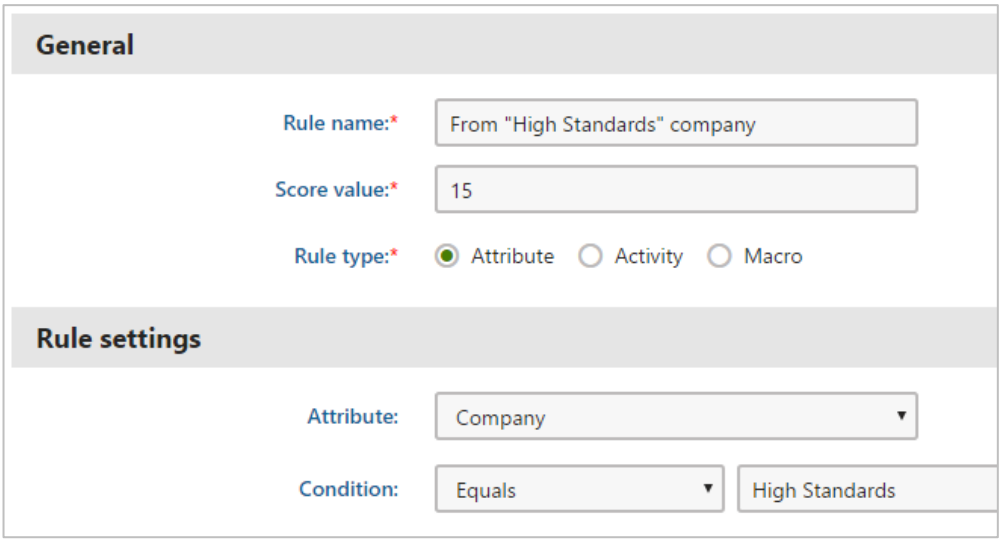
You can find some examples of Attribute rules below.

Company Information

It may be useful for you to have some information about the company your lead works for, e.g., the size of the company, its revenue, or the company's name.

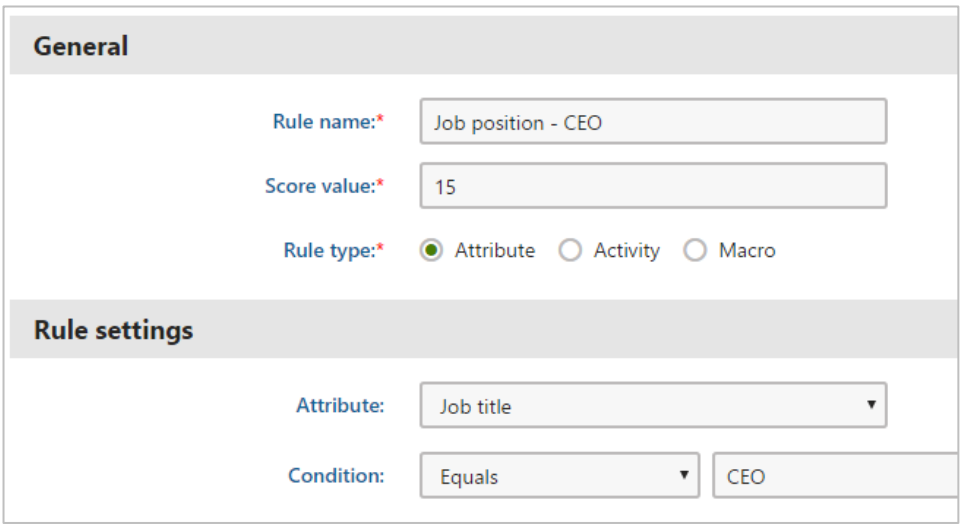
Works for a Specific Company

This rule allows you to score your contacts based on the company they work for as some of the companies may be more or less important for your business.
You can create one rule for each company and assign more points to companies that are very important to you and less to those that are of a lower importance.



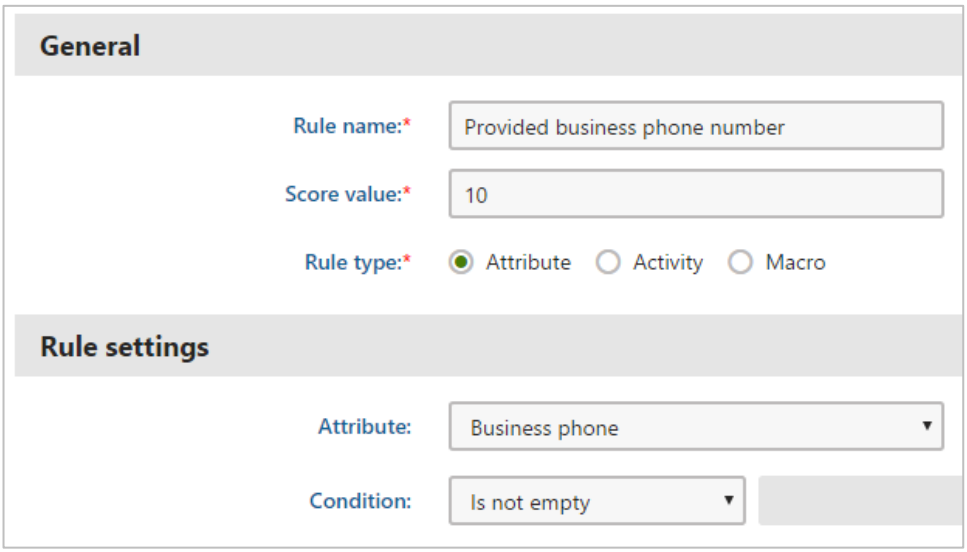
Role in a Company

During your initial research, you may have identified that it is typically a certain job role/s within a company that makes purchase decisions. If you want to score multiple roles, it is necessary to create rules for each role to which you want to assign points.



Provided Business Phone Number

This rule allows you to score those contacts who provided their business telephone number, typically via one of your online forms or personally via a business card.



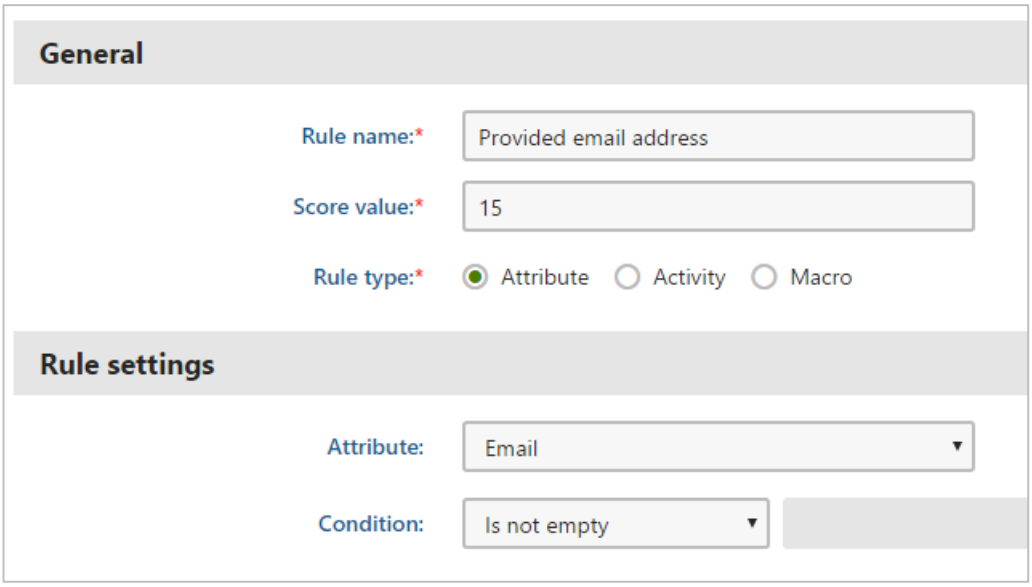
Email Address

If a provided email address is an important indicator of someone's interest in your company, then create a rule based on an Email Attribute.

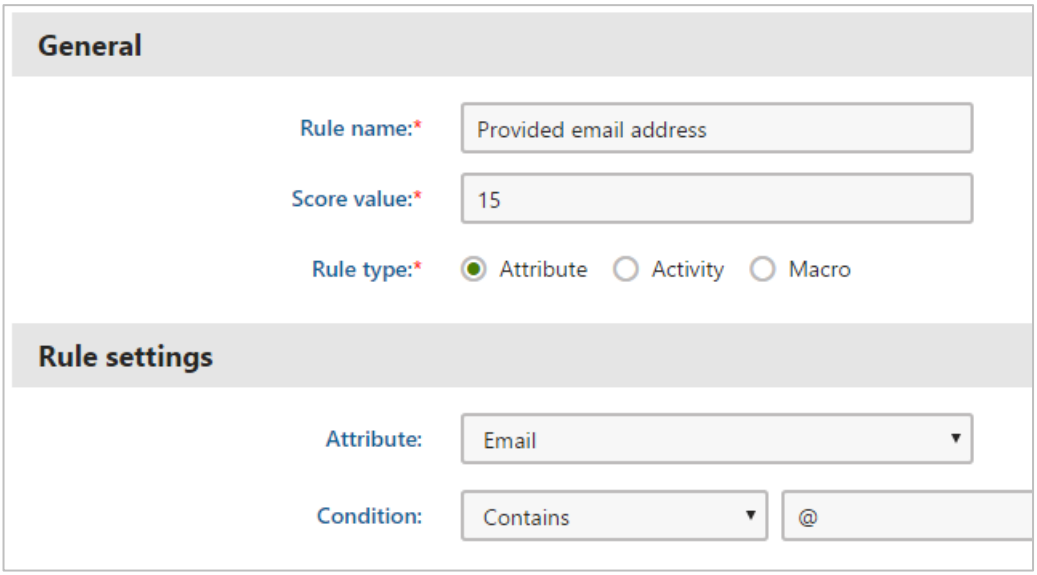
Provided any Email Address

For such a rule you can use two different further specifying conditions.

The **"Is not empty"** condition means that the Email field in the Contact's profile does contain some text.



If you want to be a little more specific, you may use the "**Contains"** condition that allows you to further specify what text or characters an Email field, in the contact's profile, should contain, e.g. at least the "@" character.

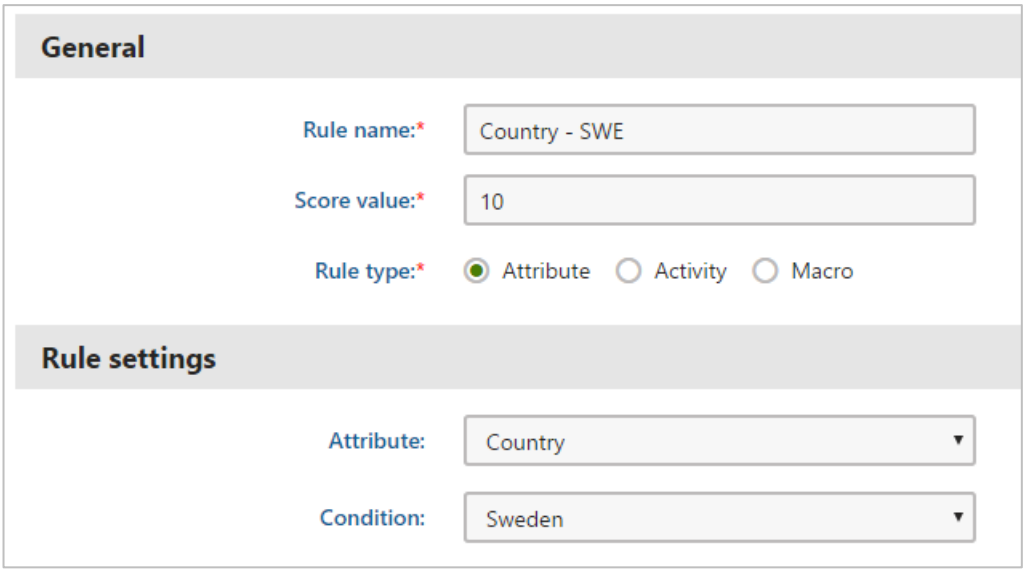


Location

You can score your contacts based on what country or city they come from. You use these rules especially in cases where some locations may be more or less important for your business.

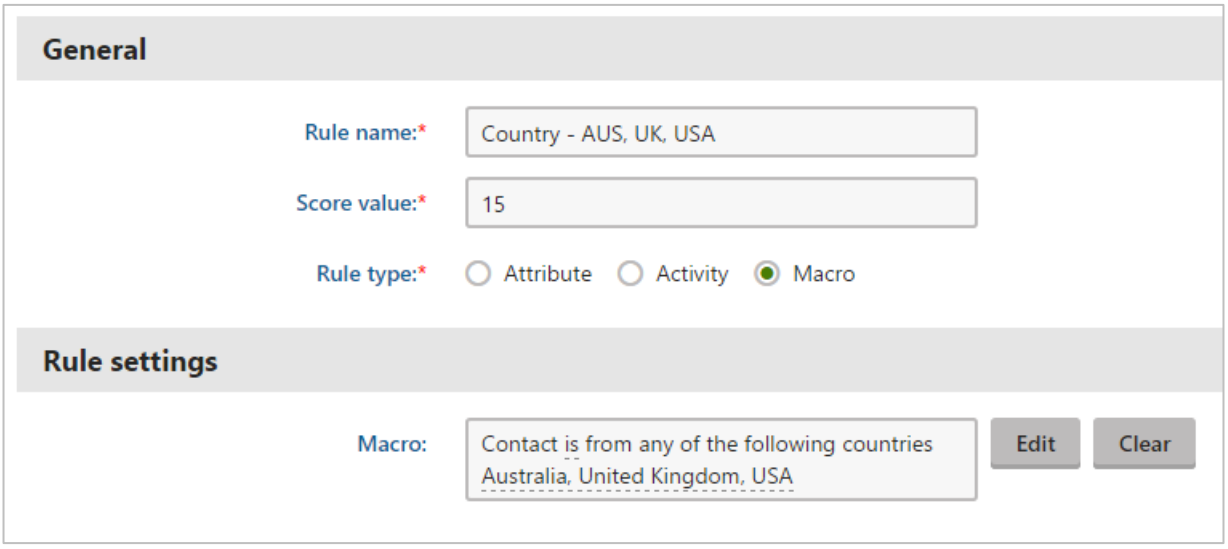
Is From a Specific Country

This rule allows you to score contacts based on the country they come from. If you have multiple countries, each with a different number of points, create one rule for each of them.



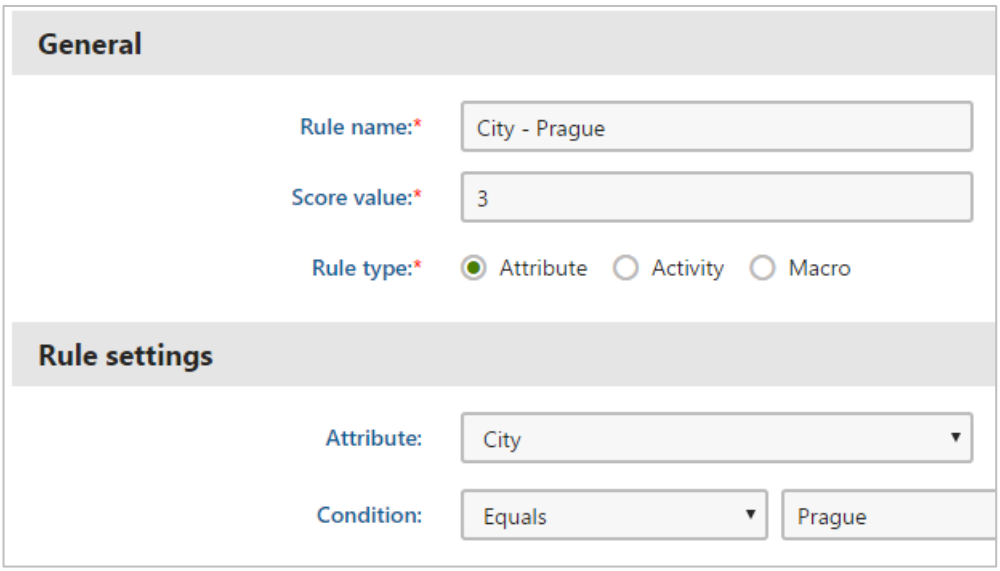
Is from Any of These Countries

This macro rule allows you to set multiple countries in one rule, all of them with the same number of points. Once inside the "Edit Macro" condition window, look for a rule *Contact is from country* and select each of your desired countries, one by one, from the list.



Is from a Specific City

This rule allows you to score contacts based on the city they come from. If you have multiple cities, each with a different number of points, create one rule for each of them.



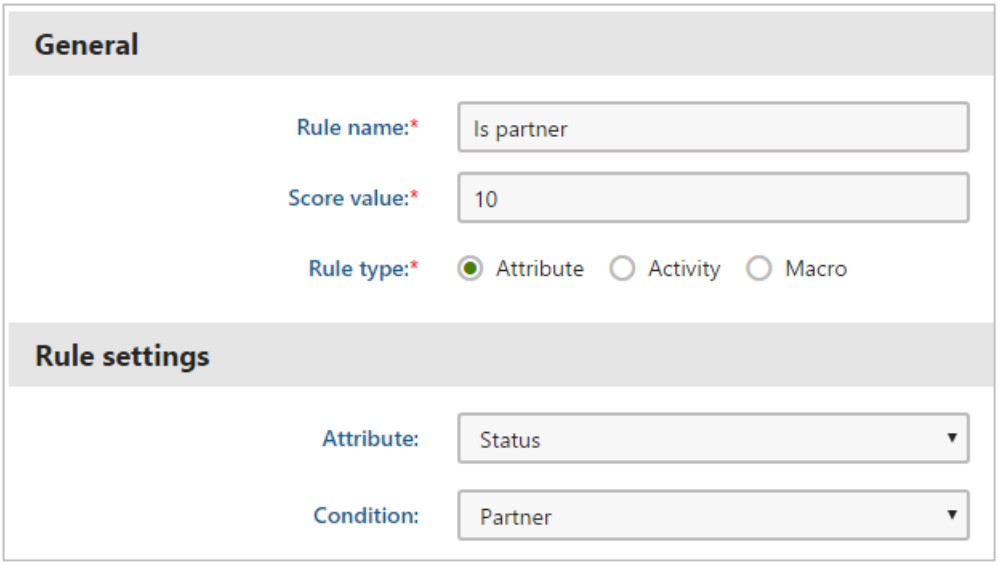
On the other hand, you can penalize your website visitors for being from a specific location by applying negative scores. Please visit the part dedicated to Negative Rules so you know how to set up such a rule.

Status

You can score your contacts based on the status they hold within your company, and how you perceive them in comparison with other contacts.

You can look at the status from different perspectives, based on how important they are to your business (e.g., VIP customers), based on how engaged they are with your events (e.g., Not interested contacts), or based on their level of partnership (e.g., Gold partners), etc.

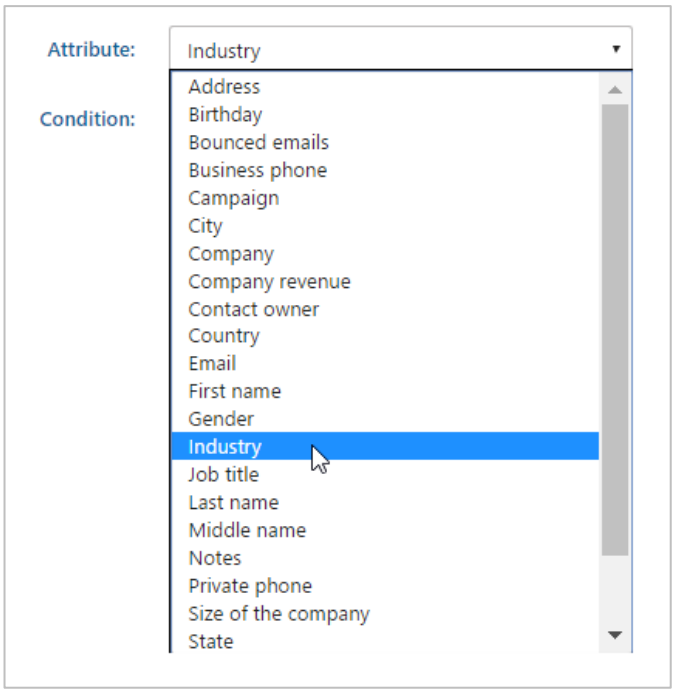
You can create contact statuses in the Contact Management application under the Configuration tab, and then you need to create a scoring rule based on the Status Attribute.



Custom Fields

The **industry**, **size** of the company, company **revenue**, or **company email address** are not fields created by default in Kentico's system. Those are fields your developers will create in the Modules application.

Once set in the system, you can select them from the Attribute drop-down list as any other Attribute rule in the Scoring application.


Attribute:
Industry
Condition:
Address
Birthday
Bounced emails
Business phone
Campaign
City
Company
Company revenue
Contact owner
Country
Email
First name
Gender
Industry
Job title
Last name
Middle name
Notes
Private phone
Size of the company
State

Activities

Activity rules are based on activities performed by your contacts directly on your website (e.g., Page Visits, Form Submissions, or Newsletter Subscriptions), or from your emails (e.g., Email opens or clicks). Activities help you understand the level of your contacts' engagement toward your business.

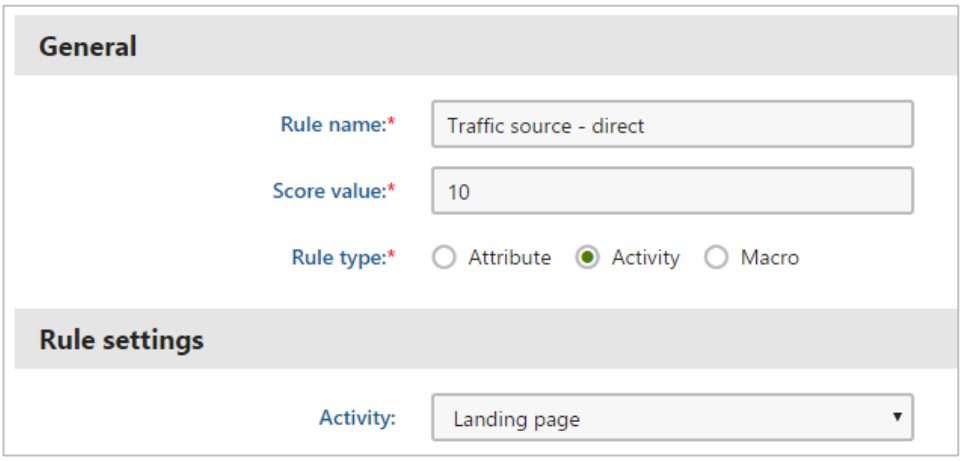
You can find some examples of the Activities rules below.

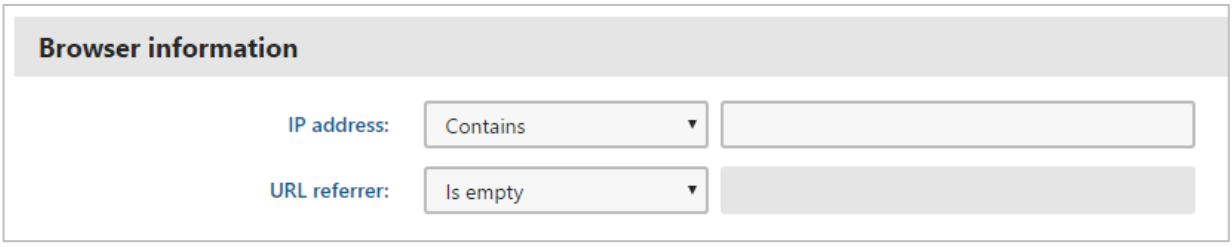
Traffic Sources

These types of rules allow you to score contacts based on where they started their journey to your website.

Got to Your Website Directly

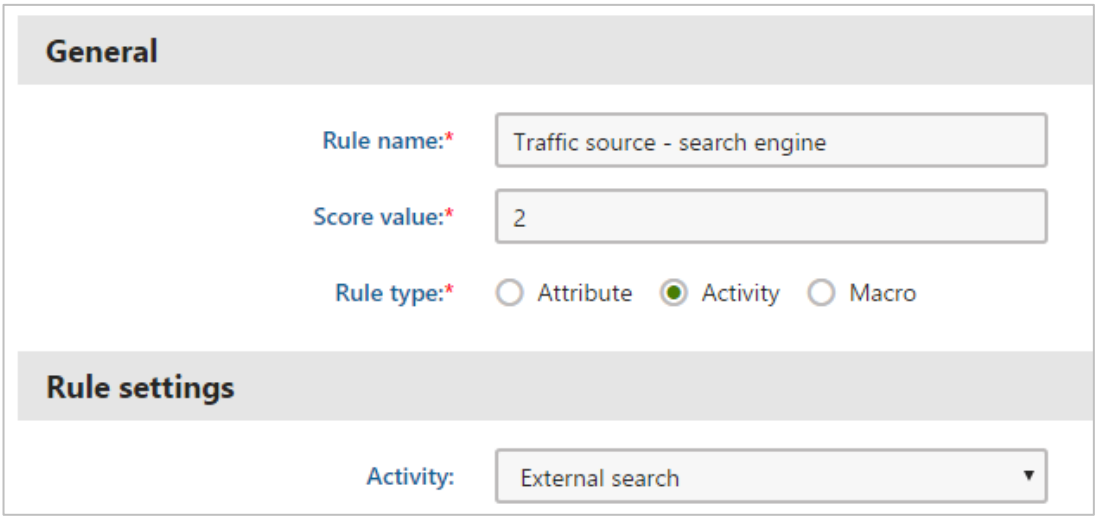
You can score contacts who visited your website by typing your website URL address into the browser address bar.





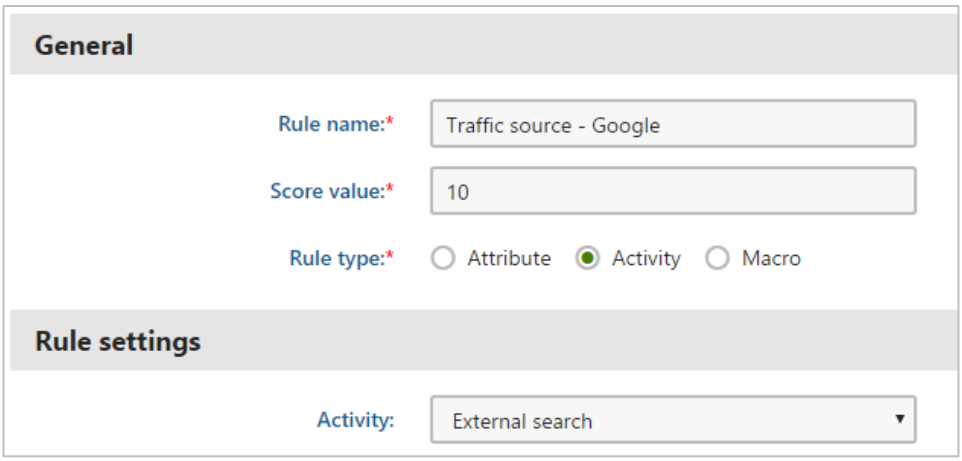
Came from Any Search Engine

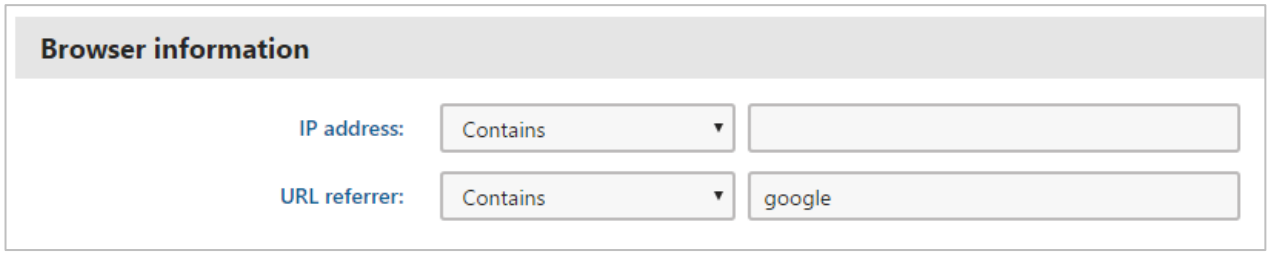
You can use the following rule to score contacts who came to your website from any search engine, without specifying what search engine it was.



Came from a Specific Search Engine

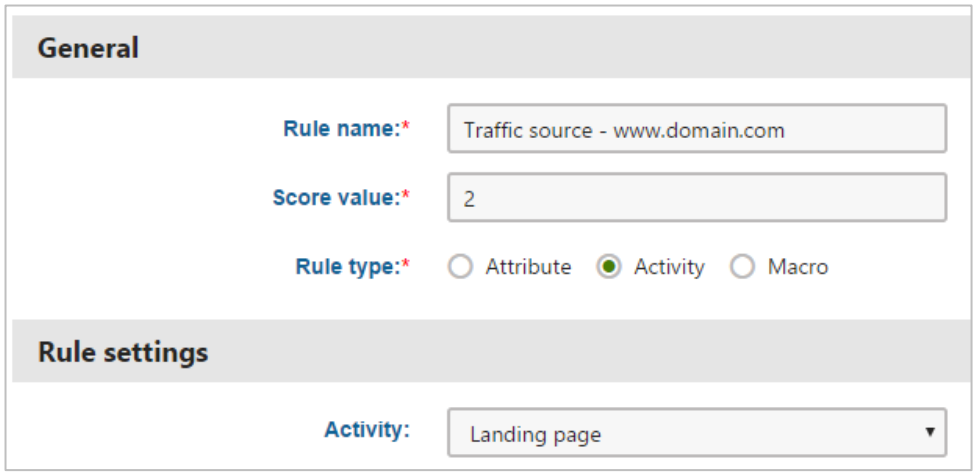
If you want to score your contacts based on the type of search engine they used in order to reach your website, use the URL referrer to specify what search engine it was.

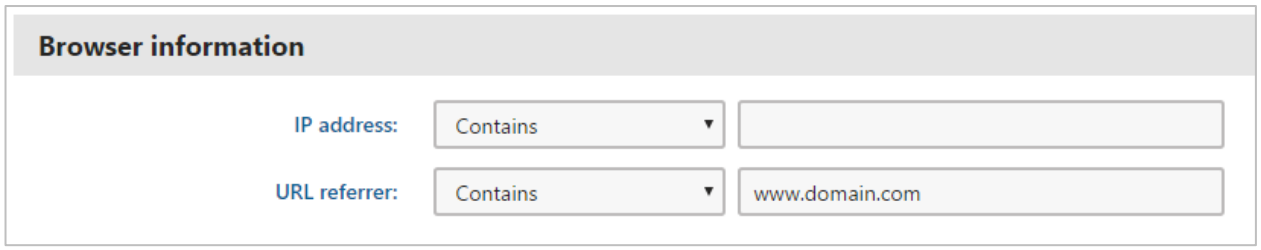




Came from a Referring Site

You can also score your contacts based on what referring site they came from. In such case, don't forget to use the URL referrer specifying the URL address of the referring site.





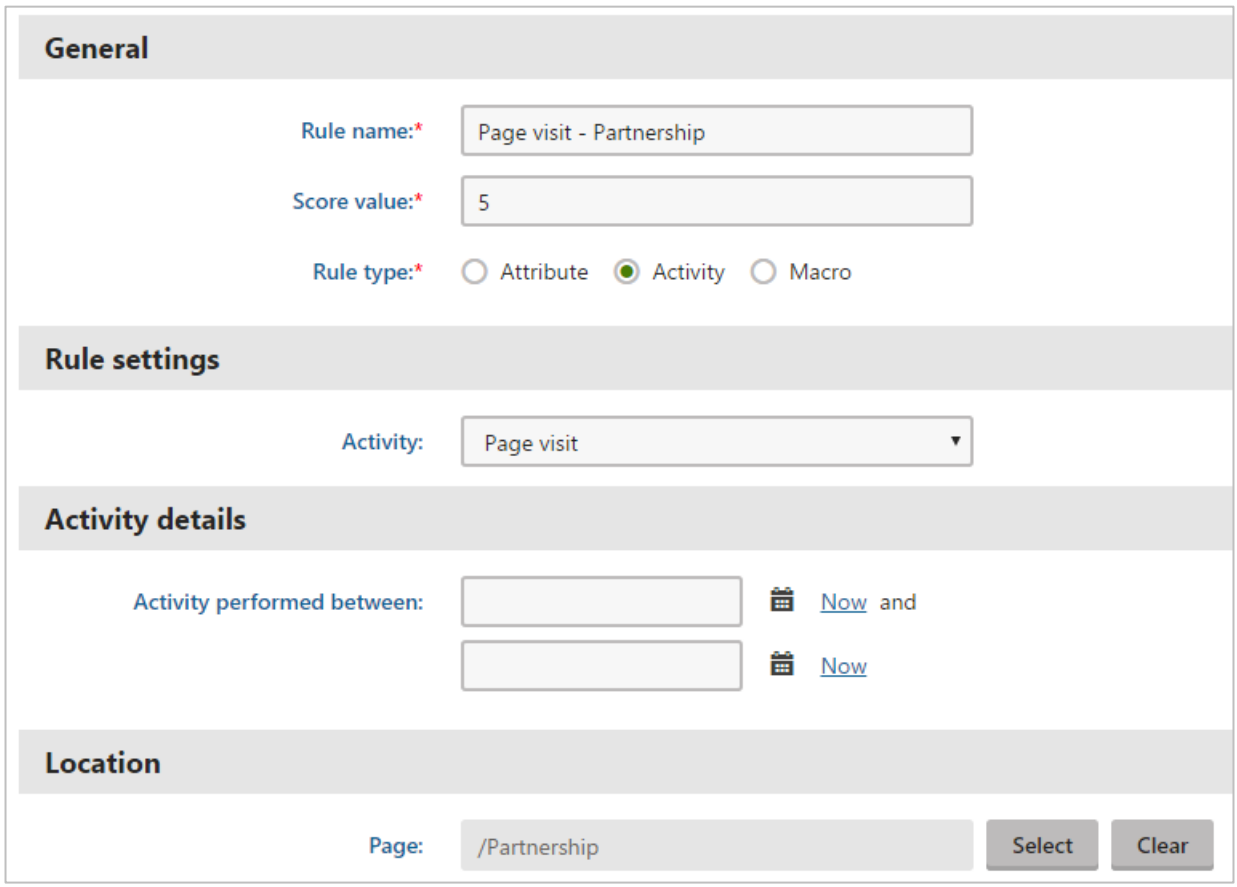
Page Visits

Page Visits rules allow you to score your contacts, based on pages they visited on your website, and add more points for recurring actions.

Visited a Specific Page

The following rule allows you to score your contacts based on a specific page they've visited. This way you will be able to assign points for visits to important pages on your website, such as the Pricing or Order page.

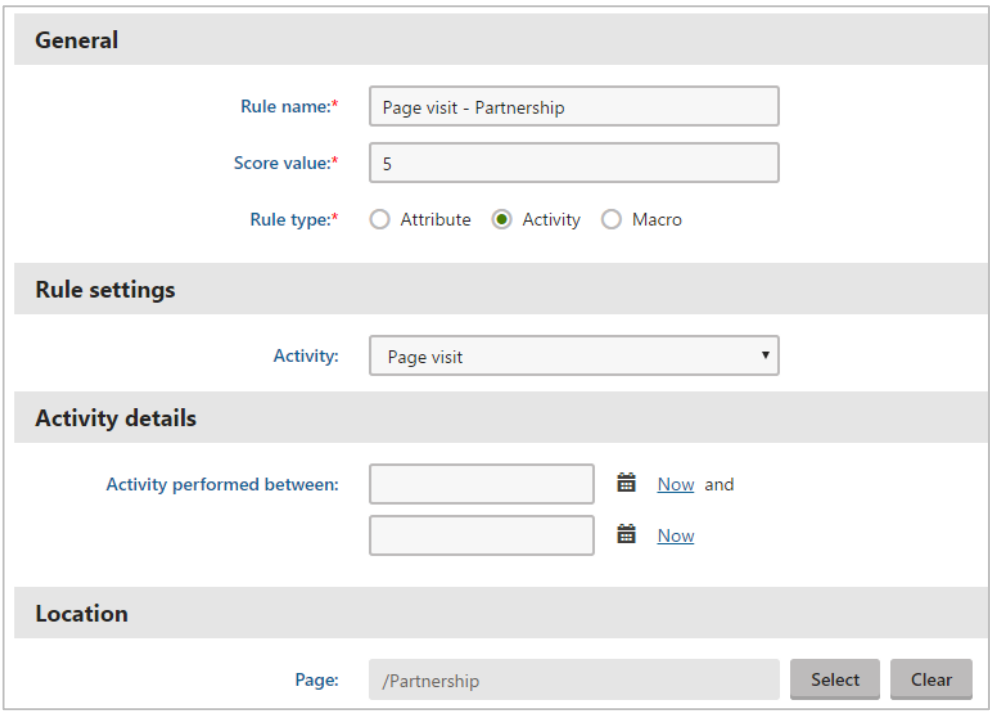
If the contact visits the page multiple times, only the first activity adds points and all the following ones are ignored by the system.

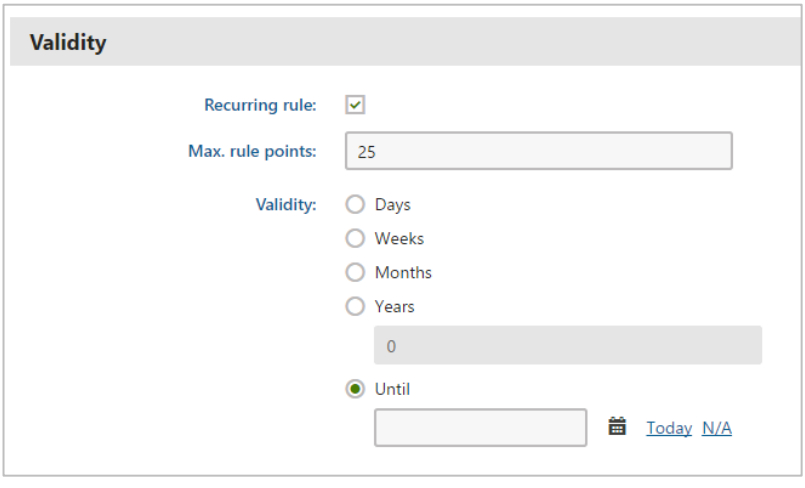


Visited a Specific Page Multiple Times

The following rule allows you to score your contacts based on a specific page they've visited and add more points to those who visited the same page multiple times.

The **Max. rule points** field limits the number of points that a contact can get for multiple visits to the same page.

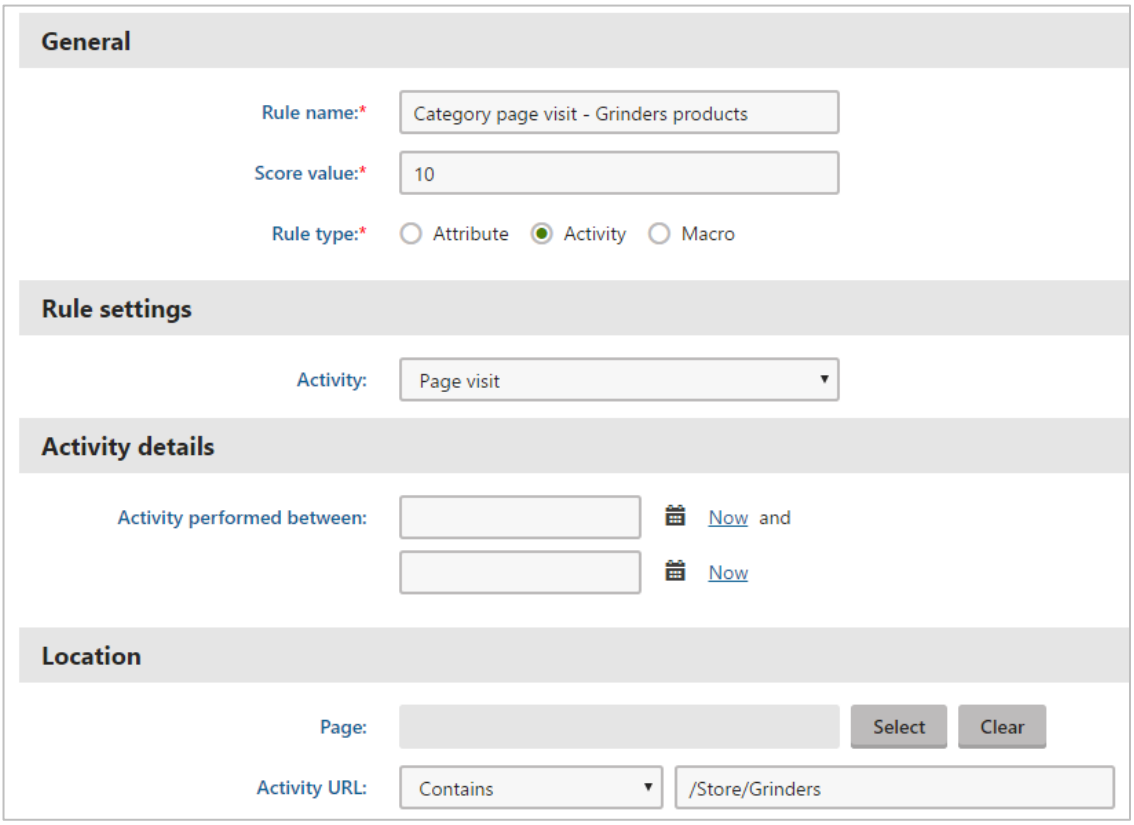




Visited a Parent Page and/or Its Subpages

The following rule allows you to score contacts who visited a specific section on your website and/or any of its subpages.

Notice that the **"Activity URL"** field contains the part of the URL specific to your parent page. It means that a contact who visits any page containing this alias path will score.

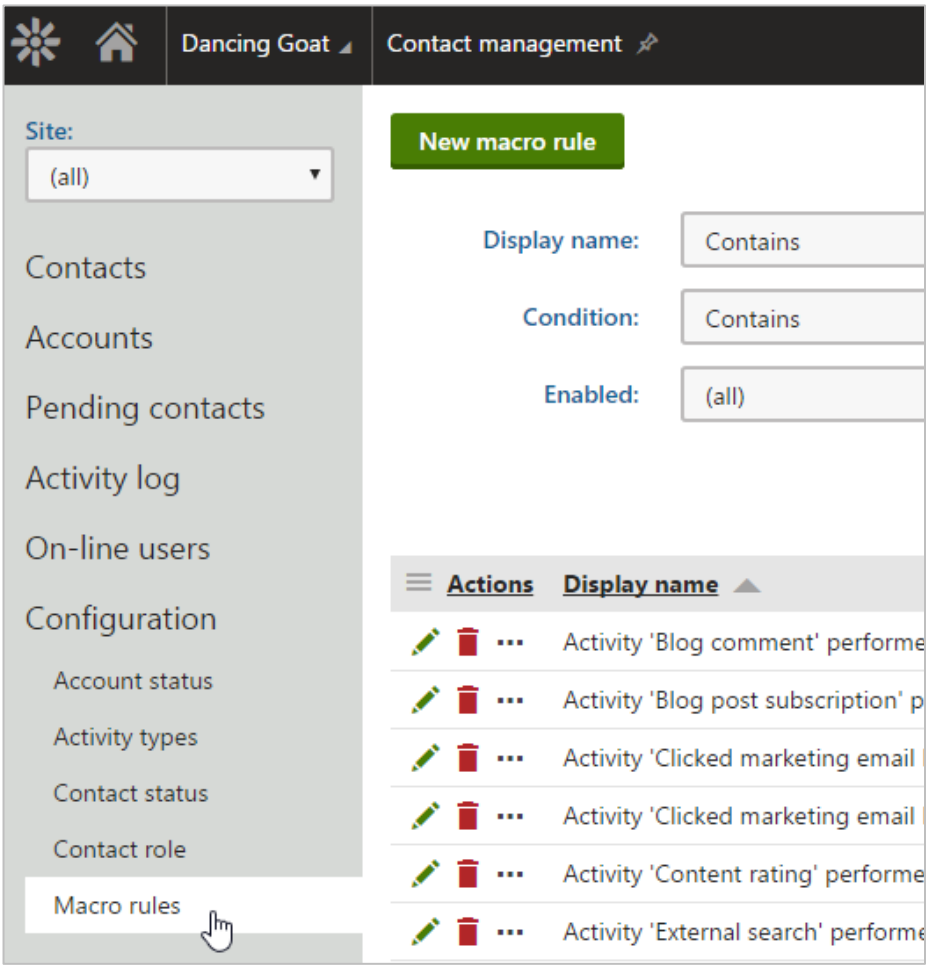


Even though it is not shown here, you can easily set a recurrence for your rule so you can assign more points to those who visited the parent page or its subpages multiple times.

Visited a Page/Whole Section at Least X Times

At the moment, we do not have any out-of-the-box rule that allows you to score contacts, **only** if they visited a certain page or a whole section **multiple times**.

For such a rule, we recommend creating your own macro rule in the Contact Management application under the Configuration tab. Here is an article that explains how to define the macro rule once it is created.

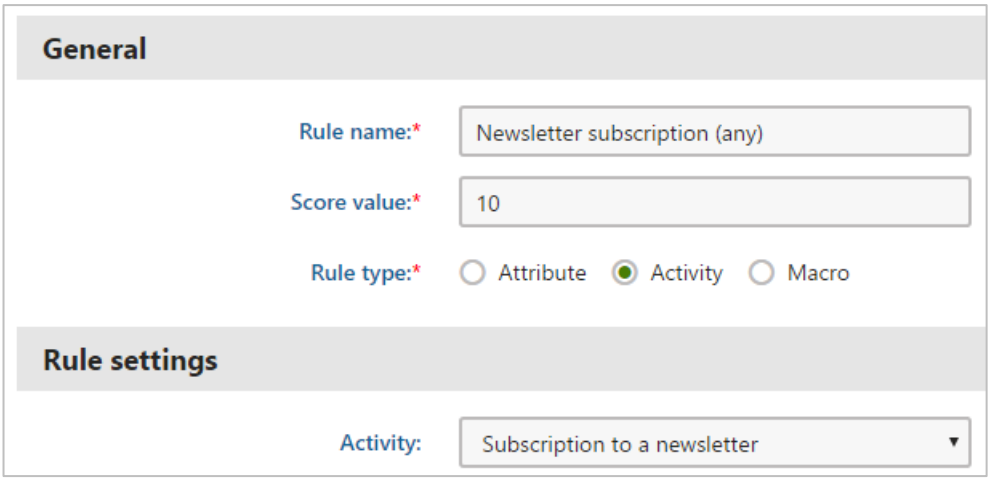


Newsletters and Emails

These rules allow you to score your contacts based on their engagement with your email marketing activities.

Subscribed to Any Newsletter

You can score your contacts based on their subscriptions to your newsletters. If you use the *Subscription to a newsletter* activity with no further specification, the system will add points to the contact for any newsletter he/she subscribed to.

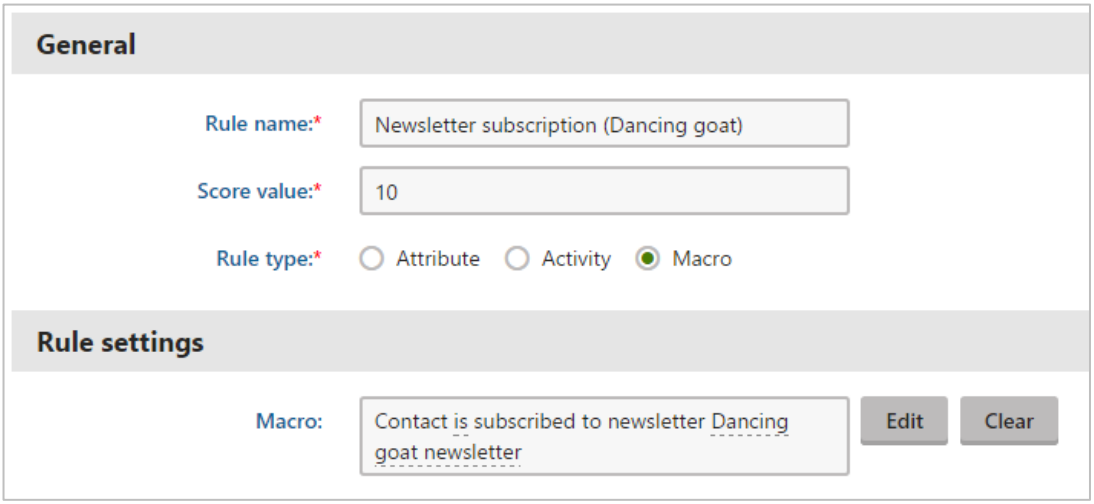


Subscribed to a Specific Newsletter

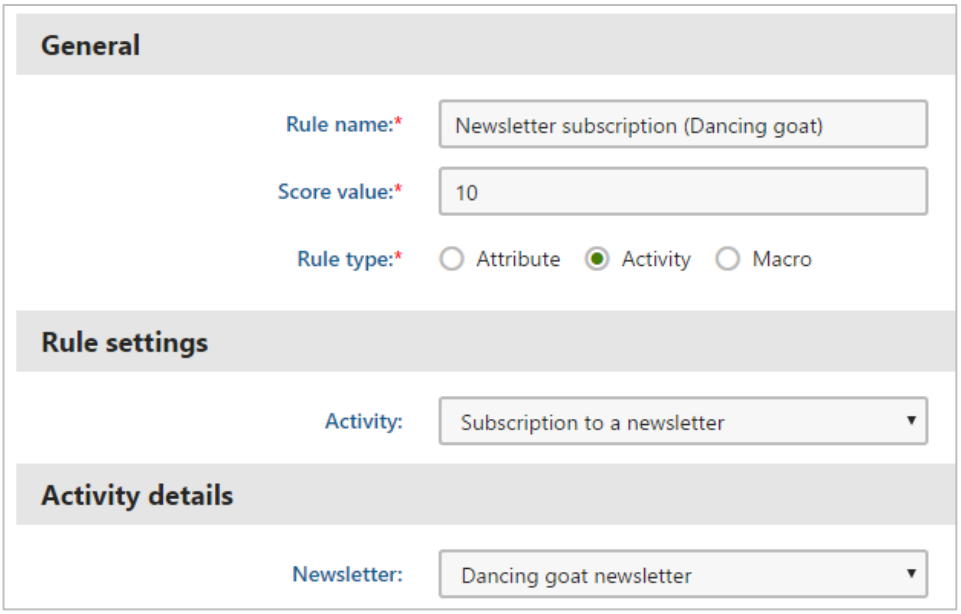
Use this rule to score contacts based on what newsletter they subscribed to.

You have two options here: use the **Activity** or **Macro** rule.

The only difference between these two is that the **Macro rule** takes care of deducting points from the contact in case he/she is not subscribed anymore to that newsletter.



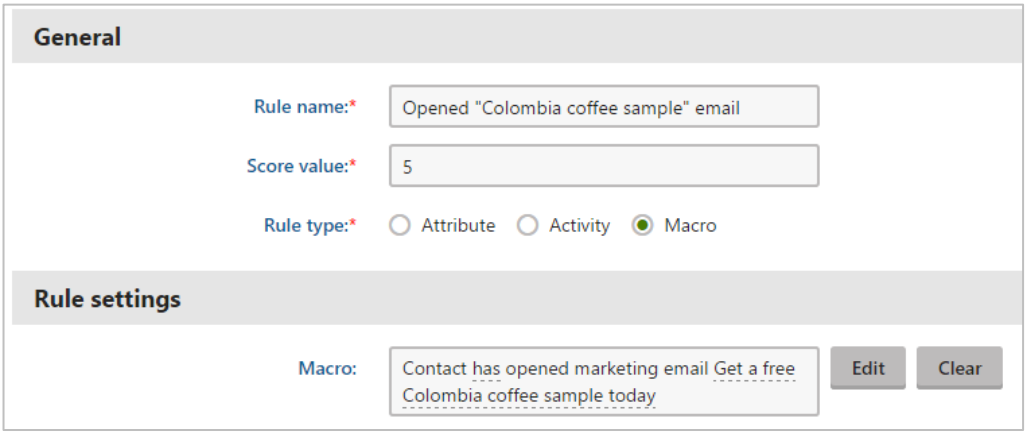
The **Activity rule** only assigns points once, at the moment of the subscription to the newsletter, and does not check if the contact is still subscribed after some time or not. If you decide to use the Activity rule, our suggestion would be to use it together with a negative rule for unsubscriptions.



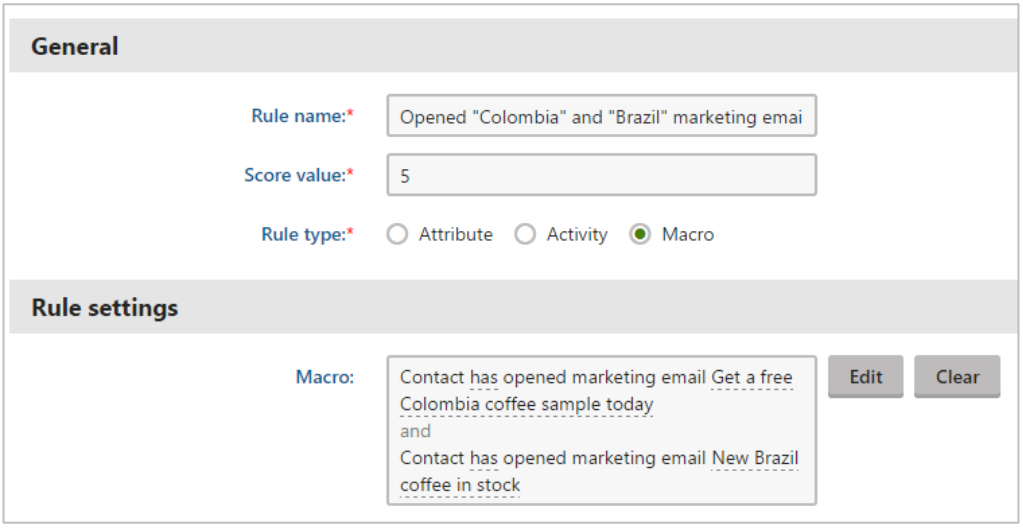
Opened Specific Email/s

This rule allows you to score your contacts based on marketing emails they opened. You have a couple of options here.

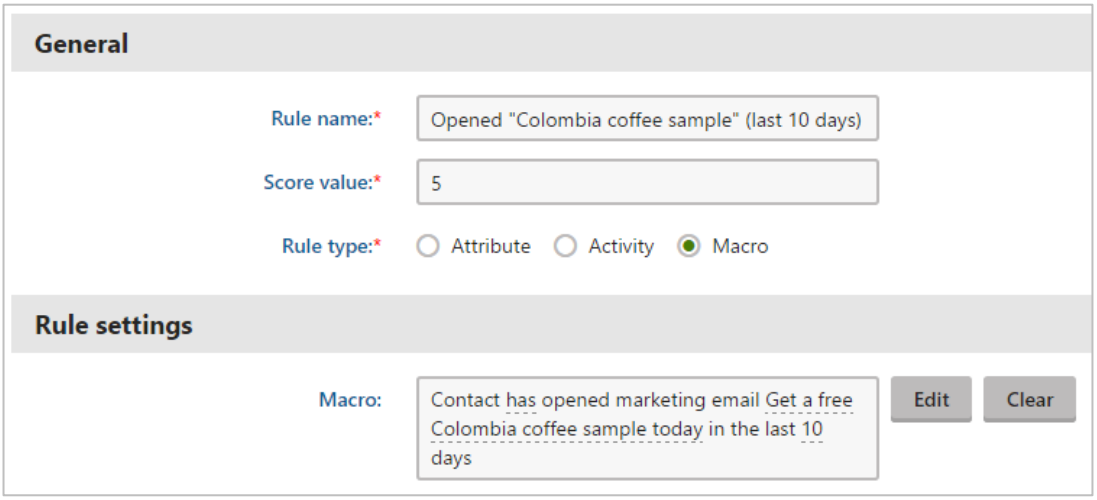
You can score them for only one email they opened. In that case, you will go for a macro rule *Contact has opened the specified marketing email*.



Or you can score contacts for multiple opened emails. In that case, use the same condition as in the previous example but as many times as you need. Don't forget that you can always change the operator in between conditions from *AND* to *OR* if that suits your scenario.

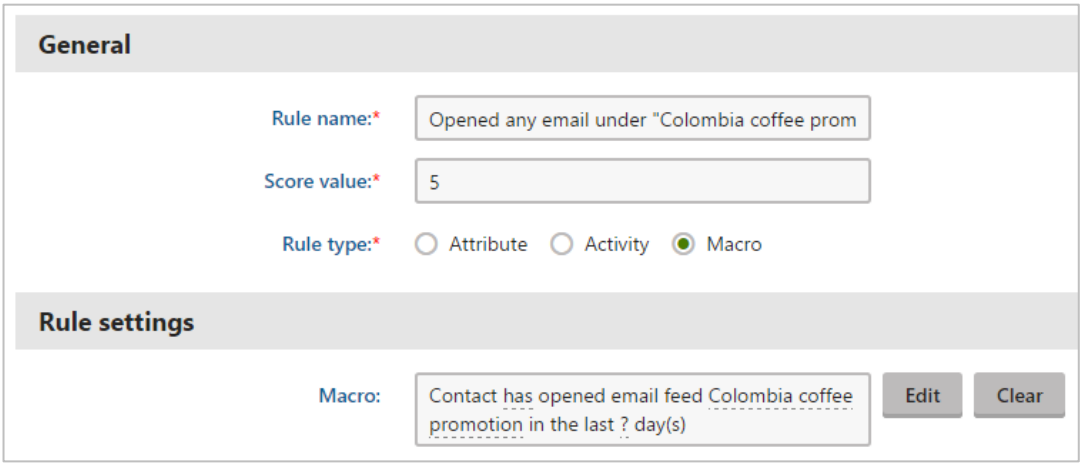


There is also a rule that allows you to specify when such an activity happened. If you want to set such a time period, use the rule *Contact has opened the specified marketing email in the last X days*.

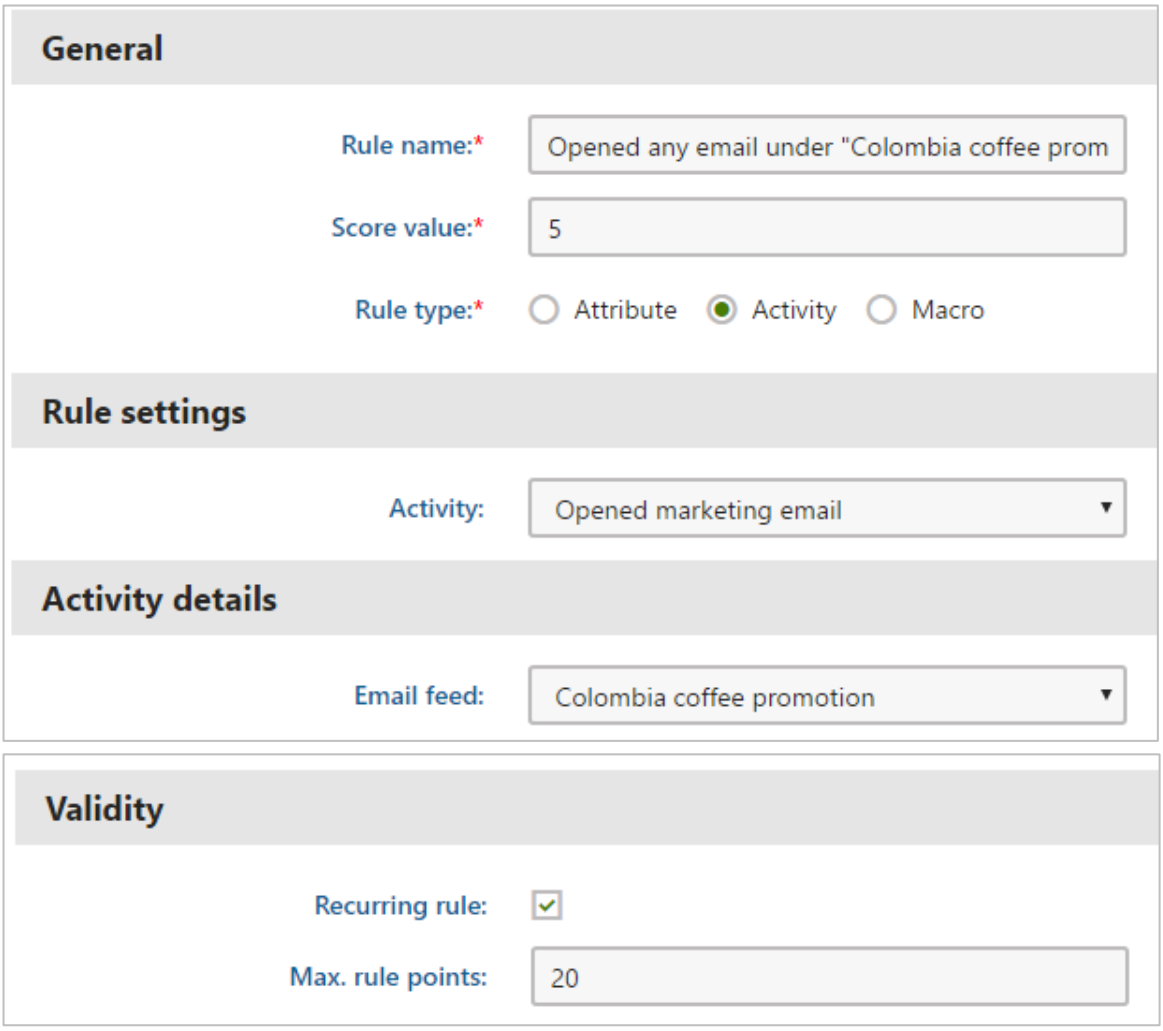


Opened Any Email under a Specific Email Feed

This rule allows you to score your contacts for any email opened under the specified email feed. Once in the editing mode, use the rule *Contact has opened one of the emails in the specified email feed in the last X days*. The contact will only score once, even though he/she opened multiple emails sent from the same email feed.

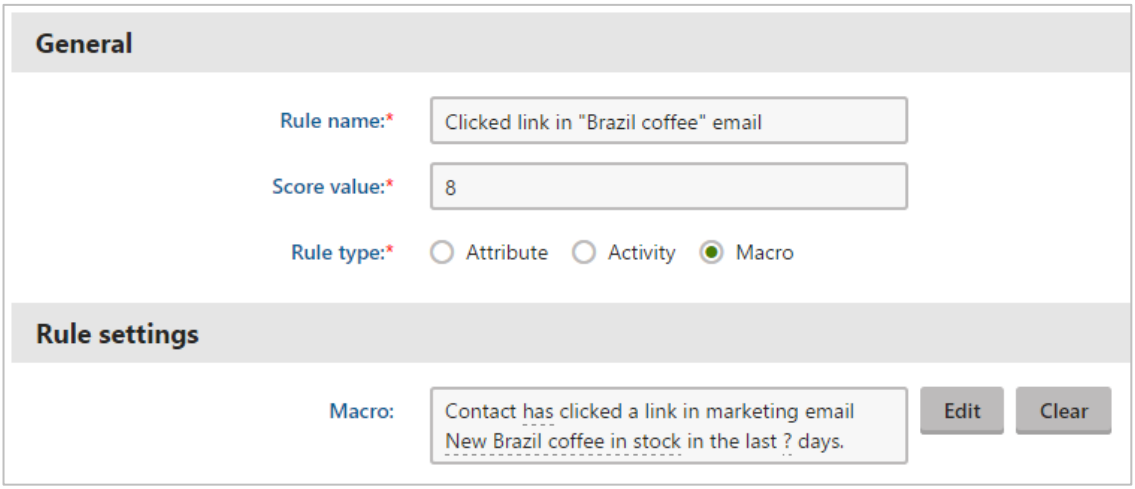


If you want the contact to collect a score for multiple opened emails under this same feed, you need to use the **Activity type** of rule and set its **recurrence**.



Clicked a Link in the Email/s

This rule allows you to score your contacts based on links they clicked in your marketing emails. Use the *Contact has clicked a link in marketing email* to design such a rule.

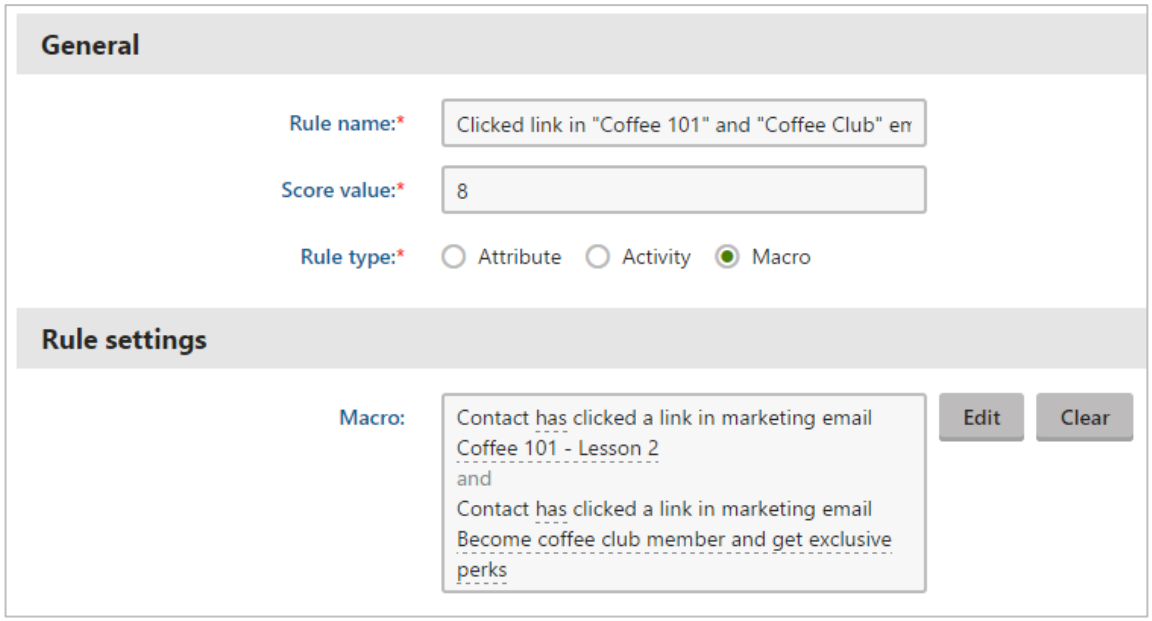


Using the **Macro rule type,** the contact will only score once, even though he/she clicked multiple links in the same email.

Do not forget you have a couple of additional options here, as in the case of rules related to email opens.

You can specify the period of time when such an email click happened. In that case, make sure you have selected the condition allowing you to set the period of time.

If you want to score contacts based on clicked links in multiple emails, use the condition any number of times you need and make sure the *AND* operator appears in between them.

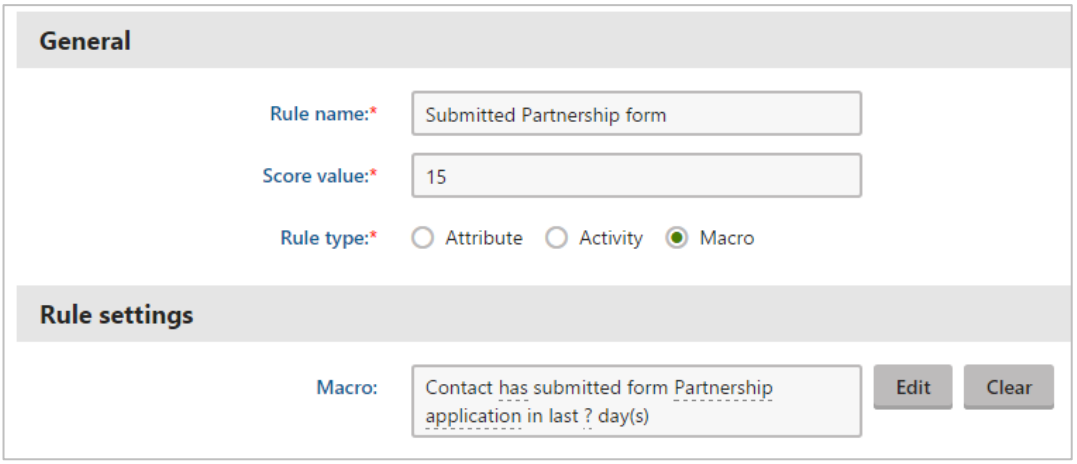


Form Submissions

The following rules allow you to score contacts based on any form completion on your website. Your forms can have many different styles and can be used for all different purposes, e.g., Consultation Booking, Demo Request, Whitepaper Download, Software Trial, or Contact Request.

Completed a Form

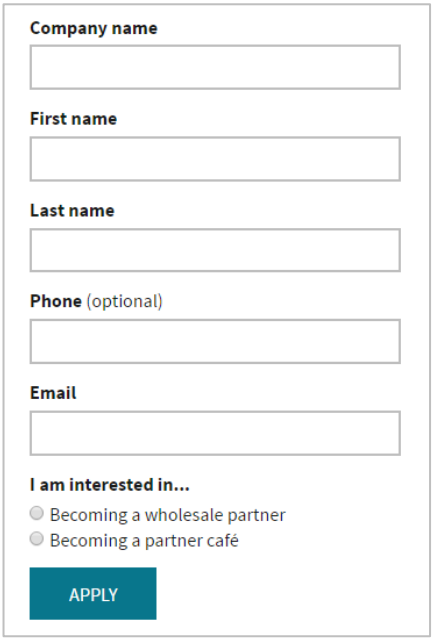
Use a macro rule to score your contacts based on a form they submitted on your website. Such a macro rule also allows you to specify the period of time when such an activity had to happen, if that is what you are looking for.



Selected a Specific Option in the Form

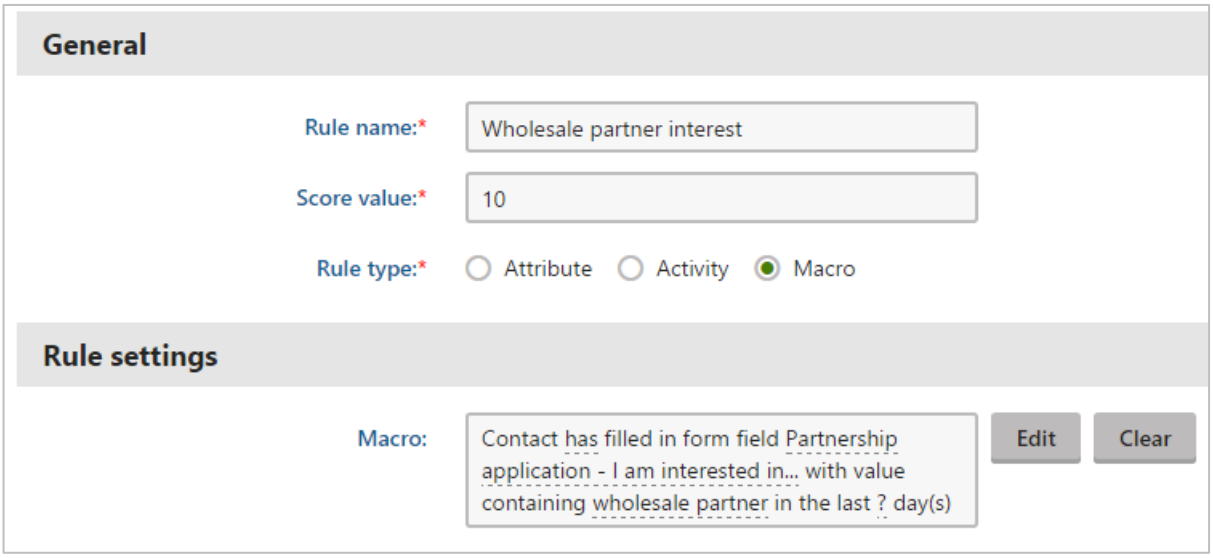
This rule allows you to score your contacts based on options selected in their completed forms.

Look at the following example. The form contains a 'radio buttons' field type with two options. We score contacts based on what option was selected by the contact.



For such a scenario, you use a macro rule *Contact has filled in form field with value containing specific text in the last X days*. The only thing you need to do is to specify the form, the field name, and put in the value for the desired option. Such a value will depend on the method developers used to define the list of options in the Forms application. Please refer to them for further questions.

Again, as with the majority of activities-based macro rules, you can set the period of time the form completion happened on your website.

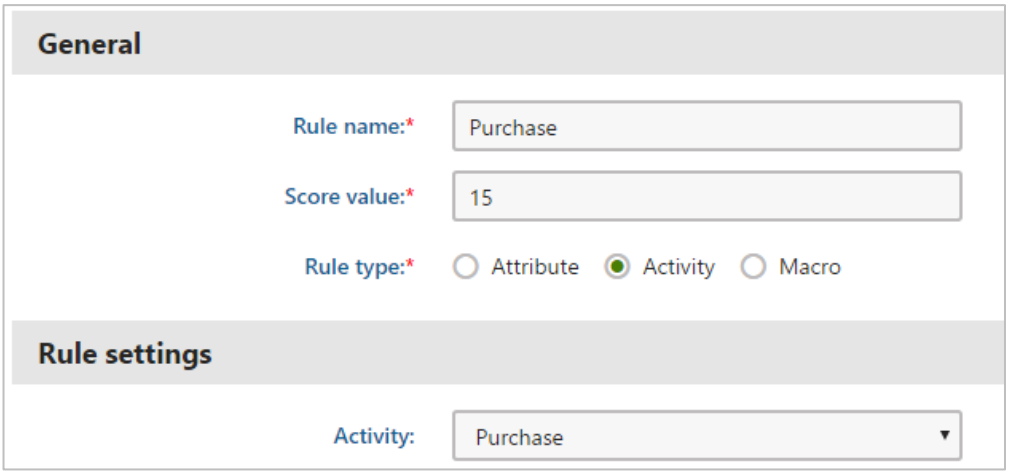


Purchases

These rules allow you to score contacts based on their purchase activity on your website.

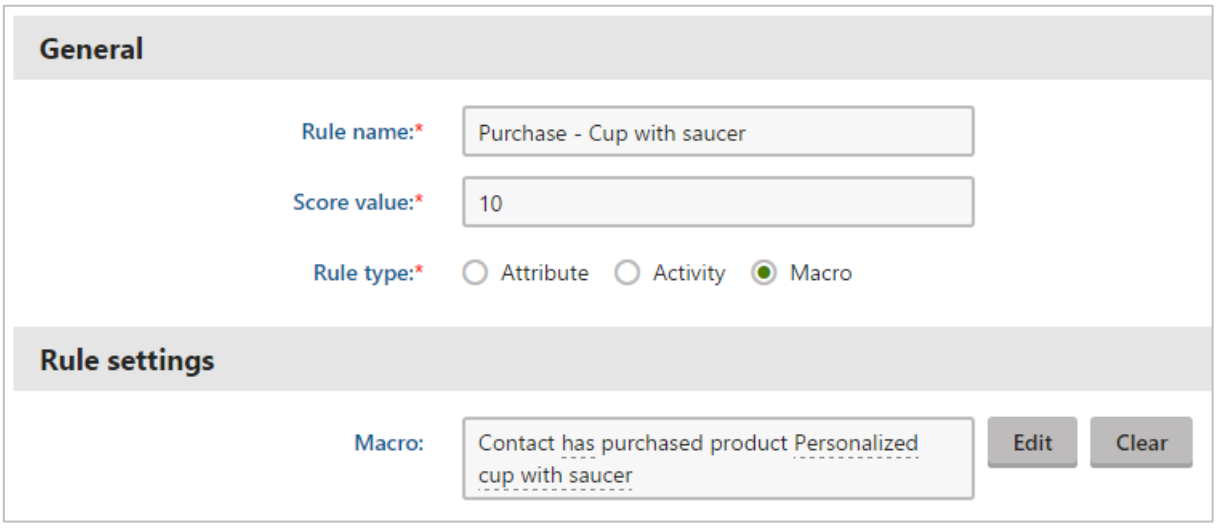
Purchased any Product

Score contacts who already purchased a product on your website. You may notice that this rule does not specify what product was purchased, thus any product could have been purchased. If the purchase happens multiple times, only the first activity adds points and all the following ones are ignored by the system.



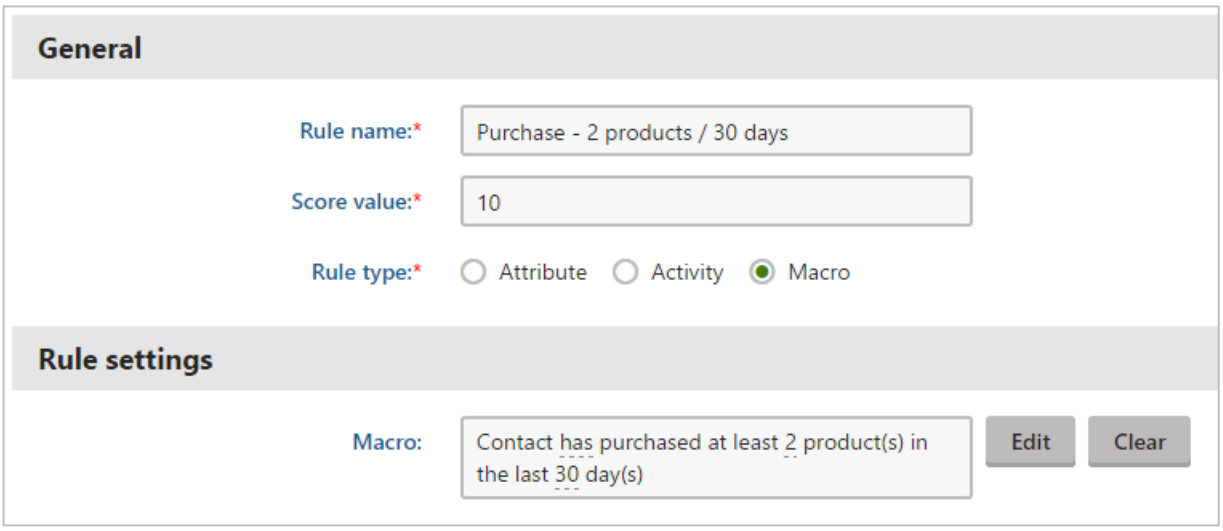
Purchased a Specific Product

You can score your contacts based on the product they purchased. In this case, you will use a macro rule, *Contact has purchased the specified product,* and you will then specify what product he/she had to purchase in order to score in this rule.



Purchased Multiple Times

Use a macro rule, *Contact purchased number of products in the last X days*, to score contacts who purchased multiple products on your website. This rule allows you to set a time period when such an activity happened. If that time period is nothing you care about, leave it empty.

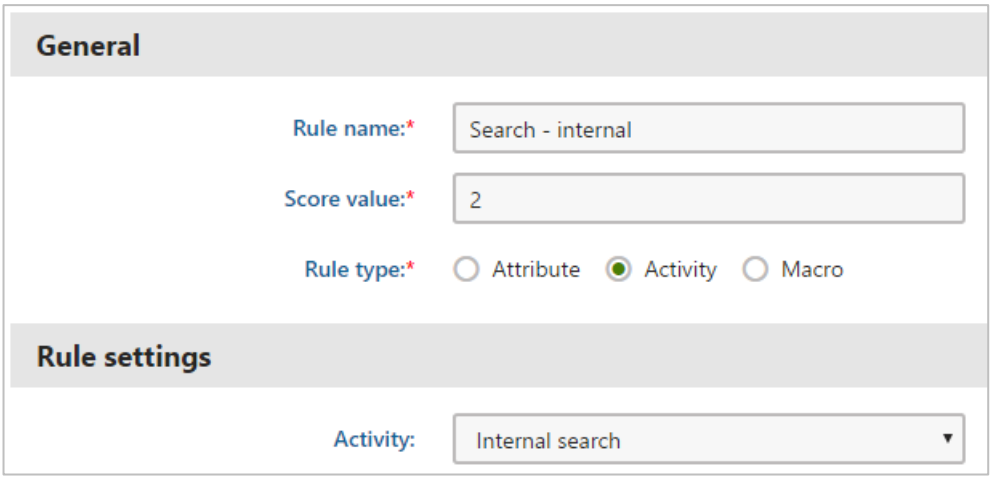


On-Site Search

Thanks to these rules, you will be able to score your contacts based on their search activity on your website.

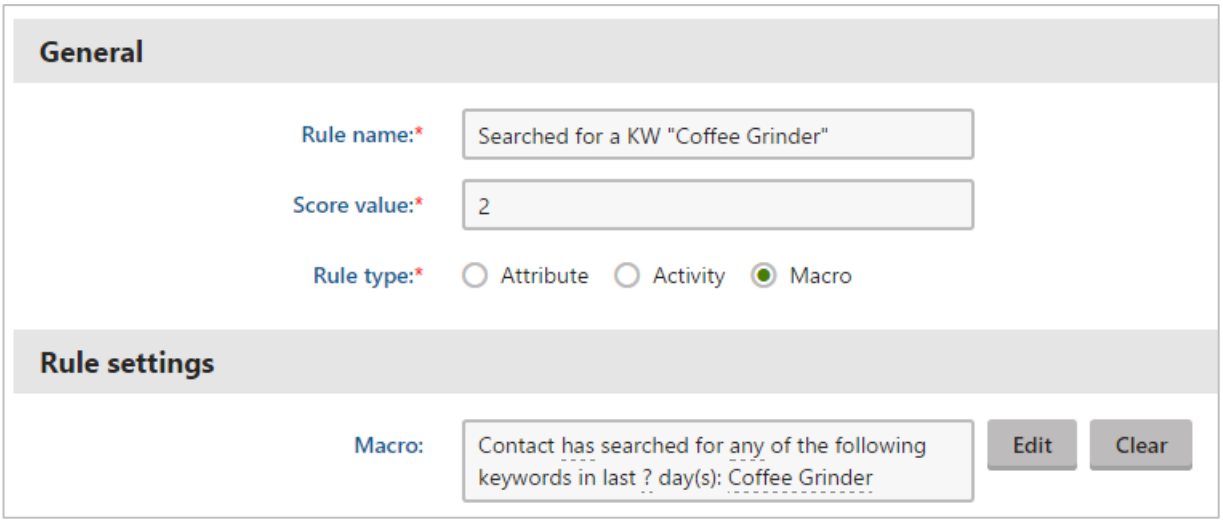
Used the On-Site Search Box

You can score contacts for using a search box on your website that may tell you the contact is interested in some specific part of your website.



Searched for a Specific Word

You can also score contacts who are looking for a specific word using the search box on your website. In this case, use a macro rule *Contact has searched for specified keywords in the last X days*.



Negative Rules

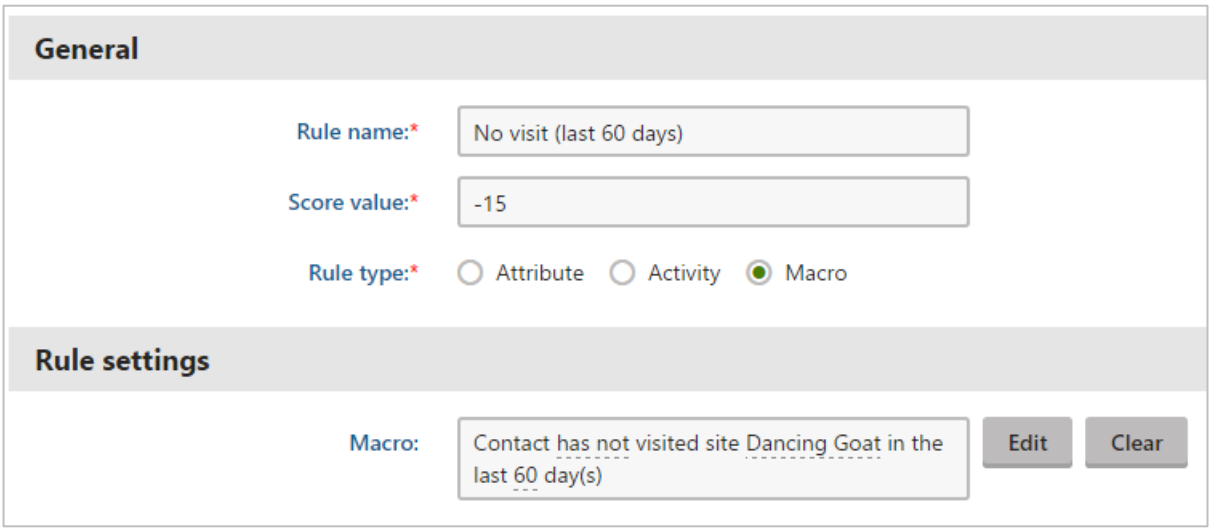
Since there may be some characteristics or behaviors that will make your leads less desirable to your business, Kentico allows you to deduct points from your leads in case those rules are fulfilled. These negative rules can completely change your scoring results and the way you look at individual leads.

To start using negative scoring, you need to add the minus sign (-) before the score in the "Score value" field.

You can find some examples of the negative rules below.

Has Not Visited the Site within the Last X Days

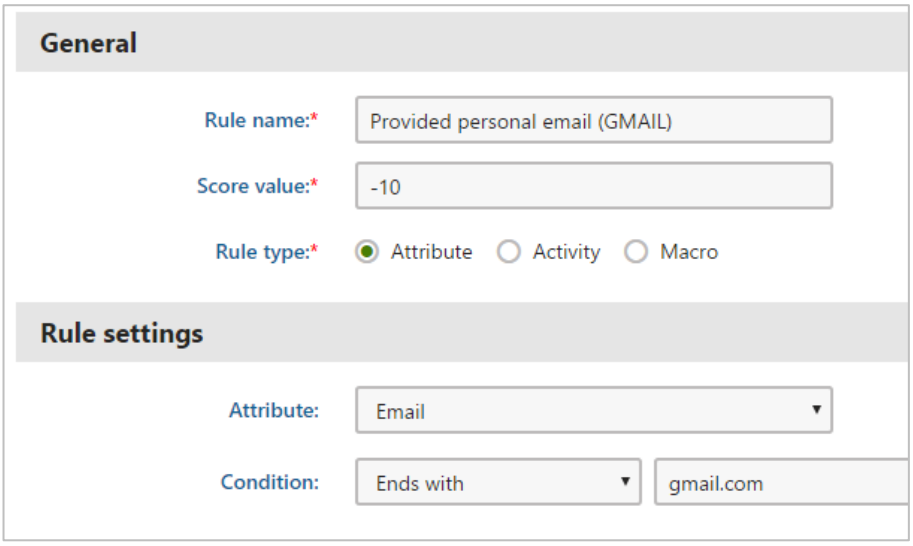
The macro rule *Contact has visited a specified site in the last X days*, allows you to penalize those contacts who have not visited your website during some period of time. Just make sure that you have switched the verb into its negative form.



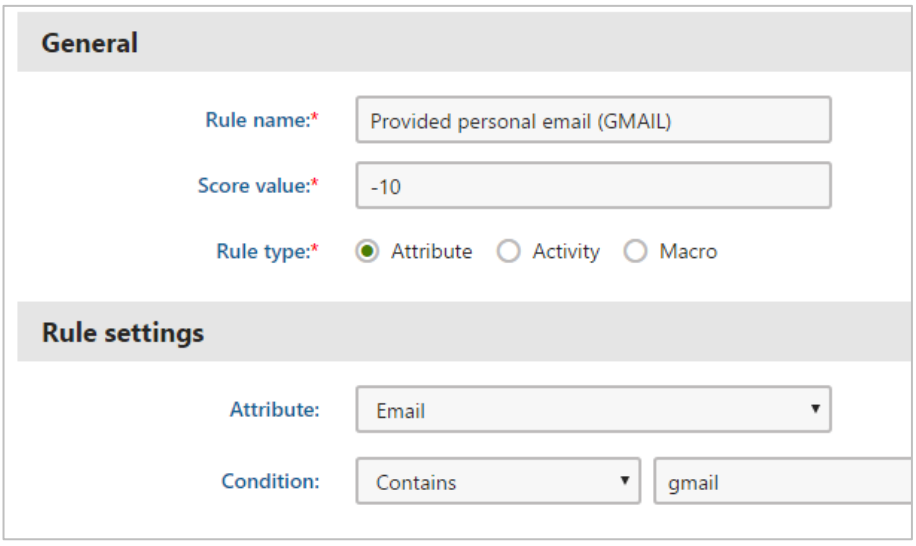
Provided Personal Email Address

You may deduct points from your contacts in case they provided you with their personal email address instead of their business one. Create one rule for each non-desired email provider.

Use the *Ends with* condition to clearly specify what the end part of the email address looks like.

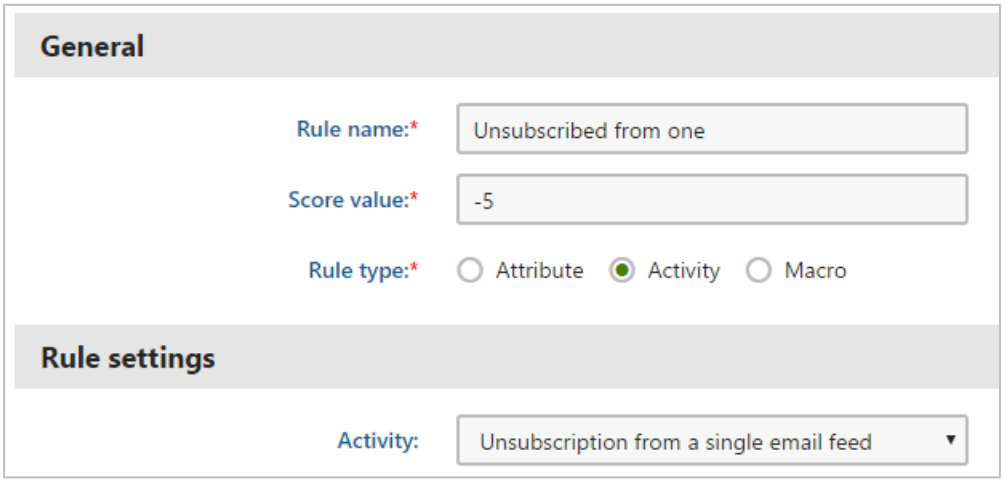


Or, you may use the *Contains* condition in case you do not want to be too specific and leave some space for modifications.



Unsubscribed from One Single Email

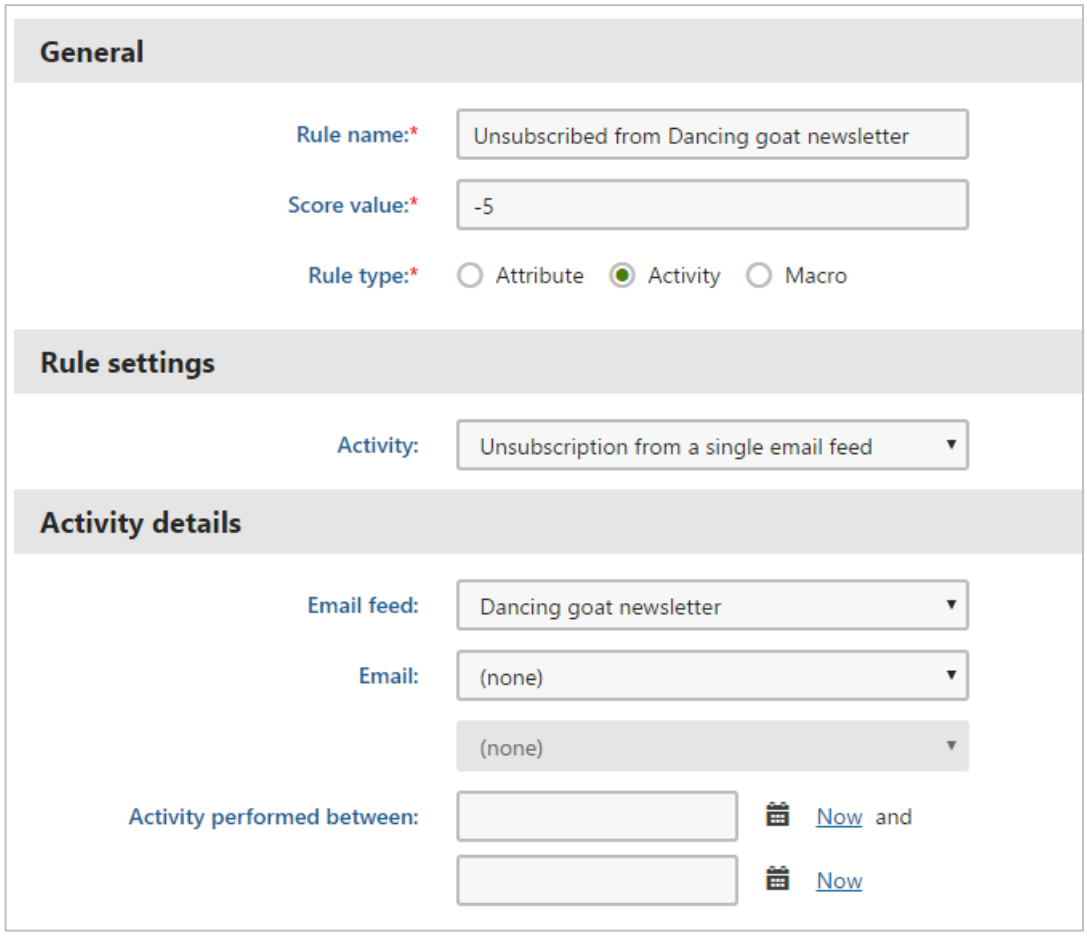
This rule allows you to deduct points from those contacts who unsubscribed from any of your email feeds (newsletters or email campaigns).



If you want to specify what email feed the contacts had to unsubscribe from to lose points, use the following rule:

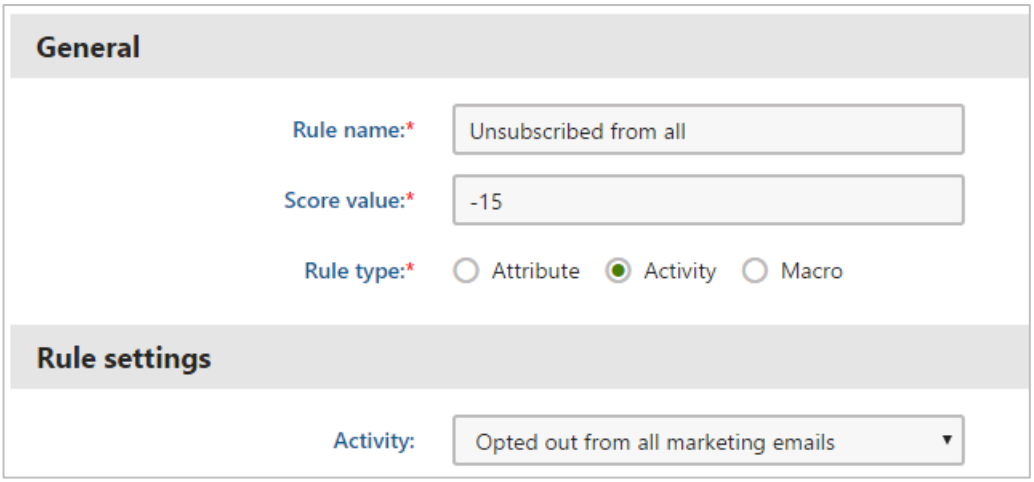
Unsubscribed from a Specific Email Feed

You can deduct points from your contacts for unsubscribing from a specific email feed (newsletters or email campaigns). The important thing to do is specify what email feed it was, in the Email feed drop-down displaying all the email feeds you've created in Kentico.


General
Rule name:*
Unsubscribed from Dancing goat newsletter
Score value:*
-5
Rule type:*
Attribute
Activity
Macro
Rule settings
Activity:
Unsubscription from a single email feed
Activity details
Email feed:
Dancing goat newsletter
Email:
(none)
(none)
Activity performed between:
Now
and
Now

Unsubscribed from All Marketing Emails

You can negatively score your contacts based on their "unsubscribe from all communications" behavior.



Please let us know at consulting@kentico.com if you think we should add some specific rules you may want to create and you have already worked with on your website. We will be adding more and more scoring rules into this guide based on your feedback.