

# How to Implement Smart Lead Scoring

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I love the Boston Red Sox,  
Marketing, and Kittens.

Download today's slides at  
[hubspot.com/leadscoring](https://hubspot.com/leadscoring)

**"There aren't enough leads  
and the leads that we do  
get aren't any good."**

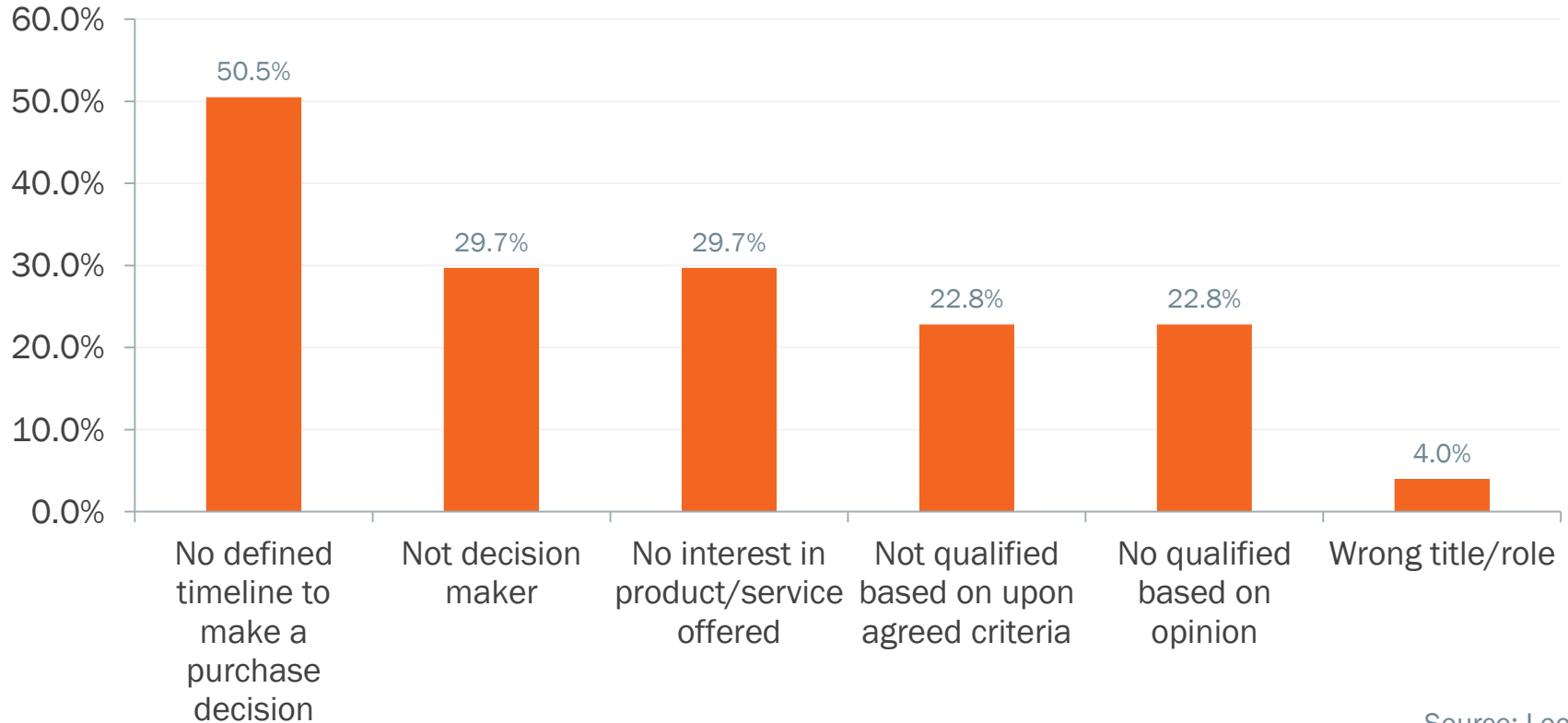
Sales

**“Sales reps cherry-pick leads and think all are rest are junk without qualifying them.”**

Marketing

# Most Frequent Complaints About Low Lead Quality

(% of respondents)





Why use lead scoring?

**Less than 25% of new  
leads are ready to buy.**

Lead scoring is a shared formula and methodology for ranking leads by their propensity to buy.



# For Marketers, scoring helps:

- 1 Measure marketing effectiveness and lead quality
- 2 Improves lead nurturing
- 3 You become more valuable to the organization

# For Sales, scoring helps:

- 1 Identify hot leads faster
- 2 Improves productivity by prioritizing leads
- 3 Accurately forecast
- 4 Improve sales effectiveness and pipeline

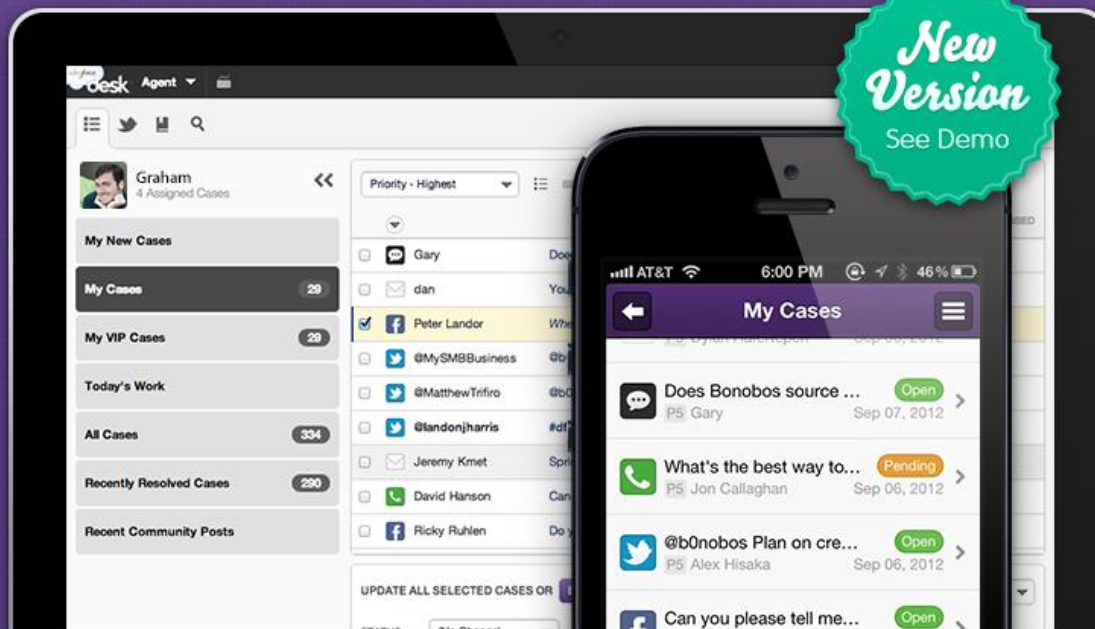
Companies that do lead scoring right have a  
**192% higher average lead  
qualification rate.**

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# 1 Do I Need Lead Scoring?

# First ask yourself....

- Is my sales team getting fed with enough leads?
- Does my sales team even call the leads I do send them?
- Do I have enough data to implement lead scoring?

## 2 Common pitfalls.



# The Wrong Way to Score Leads (Don't Do This)

If the company has over 50M in revenue = 10 points

VP title = 25 points

BANT = 50 points

If over 75 points, it goes to sales

# Other Pitfalls

- Relying on BANT from lead forms
- Asking for too much or not asking at the right time
- Assuming bigger companies or titles are better

# 3 Defining Quality Leads.

**Fit (Explicit)**



**Interest (Implicit)**

# Examples

## Explicit (Demographic)

- Job title/Role
- Company size
- Industry/vertical
- Annual revenue
- # of Employees

## Implicit (Behavior & Activity)

- # of pageviews
- # of downloads
- Type of content consumed
- Type of pages viewed
- Recency of activity

## 2 Choose number of contacts

Add up the number of contacts in all of your email lists, then add the number of new leads you generate annually from your existing site.

Contacts	Price per 1,000	Price
50	—	\$0/mo
1,000	\$100	\$100/mo
2,000	\$100	\$200/mo
3,000	\$100	\$300/mo
<input checked="" type="checkbox"/> 4,000	\$100	\$400/mo
5,000	\$100	\$500/mo
6,000	\$100	\$600/mo
7,000	\$100	\$700/mo
\$40 per 1,000 contacts		
20,000	\$40	\$800/mo
25,000	\$40	\$1,000/mo
30,000	\$40	\$1,200/mo
35,000	\$40	\$1,400/mo
40,000	\$40	\$1,600/mo

## 3 Your estimated price

\$ **1,000** /mo\*

Professional package	\$600/mo
4,000 contacts plan	\$400/mo
Yearly pricing	× 12
	<hr/>
	<b>\$12,000/yr</b>

\* All products are billed on an annual basis and require additional setup fees

### Consulting and setup options

HubSpot offers several consulting and setup plans to ensure you get up to speed quickly with our software.

- Inbound Success Training** – \$2,000 (required)
  - **Partner Inbound Success Training** – \$2,000
  - **Advanced Inbound Success Training** – \$7,000
  - **Website migration** – \$10/page (optional)

Want a quote?

Contact us and a member of our friendly sales team will schedule a time to chat

Have questions?

Give us a call and a friendly HubSpotter will answer any



## Clicked Pricing Options on Pricing Page

01/01/2013 - 07/31/2013...

[Back to all events](#)

**173,227**

Event Completions

**712**

Contacts Created

**34**

Customers Created

### Traffic Trend

[First Touch Sources](#)

[Last Touch Sources](#)

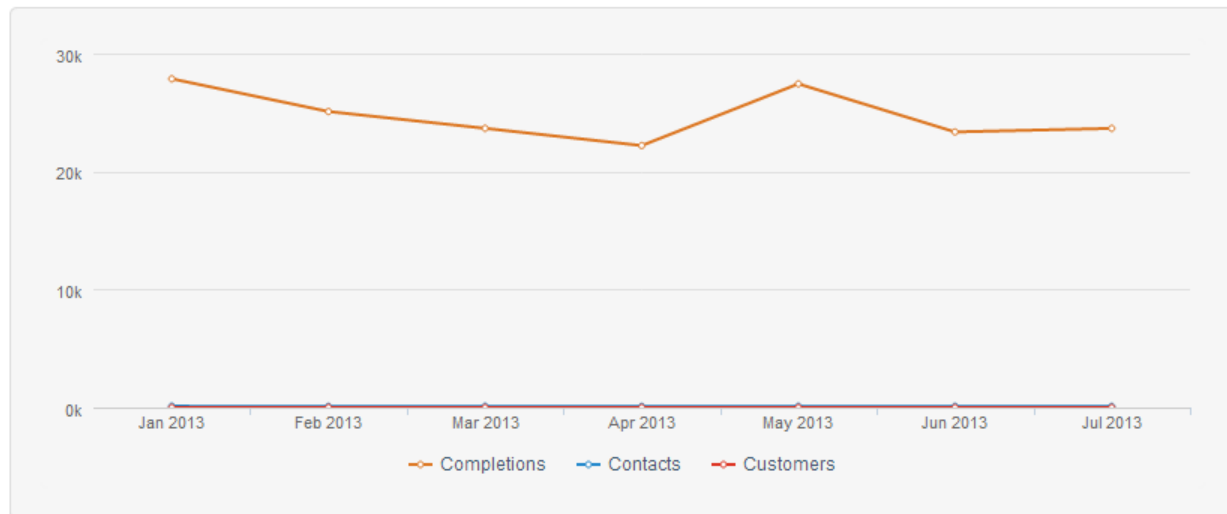
[Assists](#)

Report Actions

[Edit event](#)

[View activity log](#)

Number of people who completed the event "Clicked Pricing Options on Pricing Page"



Data Last Updated: 3 hours ago

# Collecting the Data For Scoring



Lead Forms



Data Append



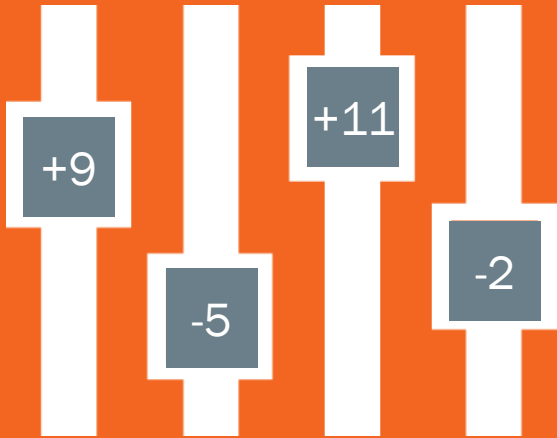
Marketing  
Software



CRM



# 4 Implementing Lead Scoring.



Points-based

# Step 1: Gather the Information

Look at explicit and implicit data

- Industry
- Job title
- Revenue
- Employee Size
- Content downloaded
- Pages viewed
- First touch (original source)
- Last touch

# Example Report

First Conversion Event  MQL Event  All leads  Create Date  Last 60 Days   
 From  To   
 6/13/2013 8/11/2013

- 

Filtered By: [Edit](#)  
 First Conversion Event not equal to [Clear](#)  
 AND From Rotator Queue Team Type equals enterprise [Clear](#)  
 AND MQL Event equals Demo,IMA,Trial,Contact Sales [Clear](#)

First Conversion Event		MQL Event				Grand Total
		Demo	IMA	Trial	Contact Sales	
<input type="checkbox"/> Form: 101 Companies Rocking Social Media Marketing, Form: Generic Form with Progressive Profiling - Download	Record Count	0	0	1	0	1
<input type="checkbox"/> Form: 10-Step Guide to Social Link Building, Form: Generic Form with Progressive Profiling - Download	Record Count	1	0	0	0	1
<input type="checkbox"/> Form: 10 Useless Things to Cut From Your Marketing, Form: 10 Things to Cut From Your Marketing	Record Count	0	0	1	0	1
<input type="checkbox"/> Form: 120 Awesome Marketing Stats, Charts, and Graphs, Form: 120 Awesome Marketing Stats, Charts, and Graphs	Record Count	0	0	1	0	1
<input type="checkbox"/> Form: 16 Companies in 'Boring' Industries Creating Remarkable Content   Free Download, Form: Generic Form with Progressive Profiling - Download	Record Count	0	1	0	0	1
<input type="checkbox"/> Form: 2013 State of Inbound Marketing, Form: Generic Form with Progressive Profiling - Download	Record Count	0	1	0	0	1
<input type="checkbox"/> Form: 2013 State of Inbound Marketing Europe, Form: Generic Form with Progressive Profiling - Download	Record Count	0	1	0	0	1
<input type="checkbox"/> Form: 30-Day Free Trial for Website Grader Users, Form: Generic Form with Progressive Profiling - Download	Record Count	0	0	1	0	1
<input type="checkbox"/> Form: 75 Free Stock Photos Ready for Use Anywhere (No Royalties, No Fees, No Worries), Form: Generic Form with Progressive Profiling - Download	Record Count	1	1	0	0	2
<input type="checkbox"/> Form: 79 Free Landing Page Templates, Form: Generic Form with Progressive Profiling - Download	Record Count	0	0	1	0	1
<input type="checkbox"/> Form: A Guide to Pinterest's New Business Accounts, Form: Generic Form with Progressive Profiling - Download	Record Count	0	2	0	0	2
<input type="checkbox"/> Form: An Introduction to Business Blogging, Form: Generic Form with Progressive Profiling - Download	Record Count	0	0	1	0	1

# Active vs. Latent Behavior

## Contact 1

[+ Add/Remove from Lists](#) [Resync With Salesforce](#) [Opt Out of Email](#) [Close as Customer](#) [Delete](#)

First Touch  
**2 Years Ago**

Last Touch  
**15 Days Ago**  
[Form Submission](#)

Lifecycle Stage  
**Lead**  
Since Apr 9, 2013

Starred

[Return to All Contacts](#)

Showing 17 Form Submissions

August  
2 Emails  
4 List Memberships

July  
2 Form Submissions  
2 Events  
1 Website Visit  
6 Emails  
5 Automation Events  
16 List Memberships  
2 Syncs

June  
5 Events  
2 Website Visits  
9 Emails  
2 List Memberships

May  
8 Emails  
2 List Memberships

April  
1 Form Submission  
2 Events  
2 Website Visits  
10 Emails  
2 Automation Events  
5 List Memberships

March  
2 Emails  
1 List Membership  
10 List Memberships  
2 Syncs

Public Contact URL  
<https://app.hubspot.cc>

Contacts Settings

Demographic: Demo - Generic (2)  
Show Submission Details - Sat Jul 27, 2013 at 4:28am  
How to Unlock the ROI of Your Marketing with Analytics  
Show Submission Details - Sat Jul 27, 2013 at 4:28am

Generic Form with Progressive Profiling - Download  
Show Submission Details - Tue Apr 9, 2013 at 3:53pm

## Contact 2

[+ Add/Remove from Lists](#) [Resync With Salesforce](#) [Opt Out of Email](#) [Close as Customer](#) [Delete](#)

First Touch  
**3 Years Ago**

Last Touch  
**5 Days Ago**  
[Opened Email](#)

Lifecycle Stage  
**Lead**  
Since May 30, 2013

Starred

[Return to All Contacts](#)

Showing 51 Form Submissions

August  
6 Form Submissions  
10 Emails  
21 Events  
2 Website Visits  
16 Automation Events  
8 List Memberships  
2 Syncs

Demographic: Demo - Generic (2) Show Submission Details - Sat Aug 3, 2013 at 11:57am	2	Updated Properties
Demographic: SEO Template Guide Show Submission Details - Sat Aug 3, 2013 at 11:57am	3	Updated Properties
Demographic: Generic Form with Progressive Profiling - Download Show Submission Details - Thu Aug 1, 2013 at 5:14pm	2	Updated Properties
Demographic: Mobile Marketing Kit Show Submission Details - Thu Aug 1, 2013 at 5:08pm	2	Updated Properties
Demographic: Inbound Marketing Assessment - Generic Show Submission Details - Thu Aug 1, 2013 at 4:57pm	2	Updated Properties
Demographic: Generic Form with Progressive Profiling - Webinar Show Submission Details - Thu Aug 1, 2013 at 4:57pm	9	Updated Properties

Public Contact URL  
<https://app.hubspot.cc>

Contacts Settings

# Negative Scoring

- 1 Latent buying behavior
- 2 Using a free email provider (e.g. gmail)
- 3 Geographic location
- 4 Non-product page visit (e.g. career page)
- 5 Negative social media comment
- 6 Email subscribe
- 7 Sales rejects the lead

## Step 2: Align with Sales

- 1 Ideal buyer persona
- 2 What constitutes as a sales-ready lead?

## Step 3: Establish Scoring Criteria

- 1 Establish scoring methodology (points, grades, etc.)
- 2 Determine a score threshold that will indicate a sales-ready lead (e.g. 75 or higher)
- 3 Establish length of time required for sales to follow-up
- 4 Build scoring criteria, rank by critical, important, influential, or negative



# Explicit

<b>Attribution</b>	<b>Value</b>	<b>Score</b>
<b>Critical (10-15 Points)</b>		
Role	VP, Sales	+12
Industry	Technology	+10
Biggest Challenge	Lead Gen	+15
Employees	200-1000	+13
<b>Important (5-9 points)</b>		
Location	US	+9
Employees	50-199	+8
Role	Manager	+5
Timeline	6 months	+5
<b>Influencing (1-4 points)</b>		
Location	Non-US, English speaking	+4
Timeline	12 months	+2
Employees	10-49	+1
<b>Negative</b>		
Role	Student	-15
Company	Unemployed	-15
Location	Asia	-10
Employees	1 or less	-13

# Implicit

<b>Attribution</b>	<b>Score</b>
<b>Critical (10-15 Points)</b>	
Downloads free trial	+15
Visit & clicked on pricing page	+14
Downloads RFP	+11
Watches online demo	+10
<b>Important (5-9 points)</b>	
Downloades MOFU offer	+9
Searches for "HubSpot"	+8
Visits 3+ product pages	+5
Heavy website activity	+5
<b>Influencing (1-4 points)</b>	
Watches webinar	+4
Downloads ebook	+2
Recent event date < 30 days	+4
<b>Negative</b>	
Recent event date > 30 days	-5
Recent event date > 60 days	-15
Visits careers page	-10
Email unsubscribes	-5

# Pre-implementation Check

- 1 Take a random sample of opportunities and customers
- 2 Examine each implicit and explicit data points, then assign points to each based on your model
- 3 Identify the percentage that would qualify as sales-ready

## Lead Scoring [Tutorial](#)

[Return to Settings](#)

The rules below determine a contact's **HubSpot Score**. You can [create a Smart List](#) to see all contacts whose score is above a certain threshold.

Assign points to contacts who meet all of these requirements: 🗑️ ✕

📄 Page View ▼ Contact has visited (exact URL) ▼ http://www.hubspot.com/pricing + -

↪️ On or after Jun 1, 2013 [Refine](#)

Rule Value: Add ▼ 20 ⬆️ ⬇️ ⬇️ ⬆️ points

Assign points to contacts who meet all of these requirements: 🗑️ ✕

📄 Contact Property ▼ Number of Conversions ▼ is greater than or equal to ▼ 4 + -

Rule Value: Add ▼ 10 ⬆️ ⬇️ ⬇️ ⬆️ points

Assign points to contacts who meet all of these requirements: 🗑️ ✕

☰ List Membership ▼ Contact is a member of ▼ All Leads (HS Recipes) + -

Rule Value: Add ▼ 10 ⬆️ ⬇️ ⬇️ ⬆️ points

Assign points to contacts who meet all of these requirements: 🗑️ ✕

⚡ Event ▼ Contact has had event ▼ Custom JS Event + -

↪️ No filter [Refine](#)

Rule Value: Add ▼ 10 ⬆️ ⬇️ ⬇️ ⬆️ points

Assign points to contacts who meet all of these requirements: 🗑️ ✕

📄 Contact Property ▼ Emails Opened ▼ is greater than or equal to ▼ 3 + -

Rule Value: Add ▼ 10 ⬆️ ⬇️ ⬇️ ⬆️ points

## Lead Scoring [Tutorial](#)

[Return to Settings](#)

The rules below determine a contact's **HubSpot Score**. You can [create a Smart List](#) to see all contacts whose score is above a certain threshold.

Assign points to contacts who meet all of these requirements:



Contact Property  (simply has this property)



Rule Value:   points

Assign points to contacts who meet all of these requirements:



Contact Property  (simply has this property)



Rule Value:   points

Assign points to contacts who meet all of these requirements:



Contact Property  (simply has this property)



Rule Value:   points

Assign points to contacts who meet all of these requirements:



Contact Property  (simply has this property)



Rule Value:   points

Assign points to contacts who meet all of these requirements:



Contact Property  is equal to



Rule Value:   points

[+ Add another rule](#) to assign points to contacts who meet a different set of requirements

# CRM View

## ▼ HubSpot Intelligence

-  **Generate more leads from Facebook for VNP**  
Jun 18th 2013 - 4:04 pm
-  **HSCM-unbounce-comarketing-lead-generation-ebook-20130611**  
Jun 18th 2013 - 3:40 pm
-  **Free Ebook: How to Generate Leads Using Facebook**  
Jun 18th 2013 - 3:38 pm
-  **Generic Form with Progressive Profiling - Download**  
Jun 18th 2013 - 3:38 pm

Visits: 194      Page Views: 454      Submissions: 45

Last Seen *5 hours ago* through:  
**Generate more leads from Facebook for VNP**

Became a lead *7 months ago* through:  
**20 Marketing Trends and Predictions for 2013 and Beyond**

First seen *2 years ago* via *organic search* through:hubspot

HUBSPOT SCORE:

# 58

[View In HubSpot](#)

## Past Emails

-  **MK VSB Workflow Platypus to New 1's - Second**  
LN VSB New 1-5s and Med, High In Progress to Platypus
-  **MK VSB Workflow Step by Step Guide**  
LN VSB New 1-5s and Med, High In Progress to Platypus
-  **MK VSB Workflow Platypus to New 1's - First**  
LN VSB New 1-5s and Med, High In Progress to Platypus
-  **SendEmail**  
Internal workflow

## Scheduled Emails

Contact does not have any future emails scheduled

LN Campaign - SMBs ▼

[Enroll In Workflow](#)

Contact is enrolled in 1 workflow



**Dollar-based**

MQL Type	Average Revenue / Customer	Lead to Customer Close %	Value per MQL
Whitepaper	\$160,000	1.0%	\$1,600
Webinar	\$100,000	1.5%	\$3,000
Online Demo	\$150,000	2.0%	\$3,000
Tradeshaw	\$125,000	1.0%	\$1,250
Contact Sales	\$110,000	10.0%	\$11,000



[View all workflows](#)

Workflow details

[Edit workflow](#)[Performance](#)[History](#)[Workflow settings](#)[Browse Recipes](#)

Explore commonly used lists, emails, and workflows to generate ideas.

## SLA-Enterprise-Demo

Begin this workflow when...



- A smart list updates

### 1 First workflow step

- Set property



[Save workflow](#)


When activated, this workflow will enroll...


 Workflow Is Live 

New contacts in list 

SLA-Enterprise-Demo 

 Enrolled the list's existing contacts 

 25 contacts

Unenroll contacts when they join a goal list (optional) 

No goal list selected 

Add step

1 First workflow step

Delay for  Days  Hours  Minutes 

Set a contact property v... 



SLA Value 

56.33  

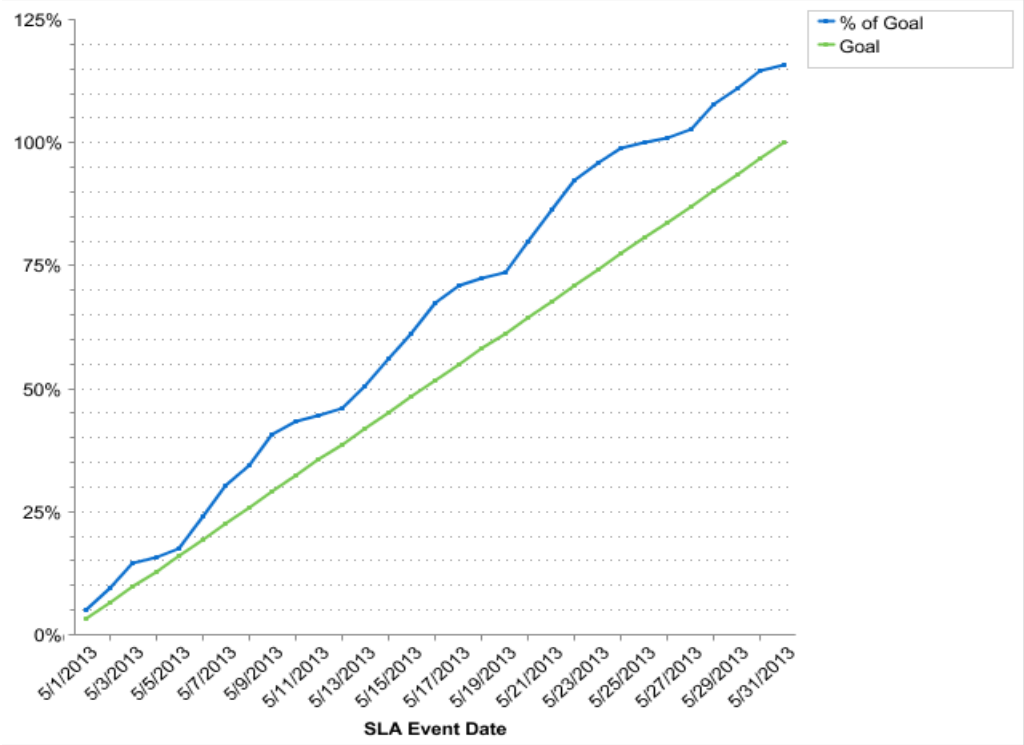
Add step

[Need help?](#)

# Lead Record View

Demo Request Datetime	
IMA Requested	<input checked="" type="checkbox"/>
IMA Request Datetime	8/5/2013 1:42 PM
Contact Sales	
Contact Sales Datetime	<input type="checkbox"/>
MLQ Sales Team	Enterprise
SLA Value	28.70
SLA Event Date	8/4/2013
MLQ Event	 IMA
MLQ Event Date	8/4/2013
MLQ Event from HS	Other
 MLQ Date from HS	8/4/2013
From Rotator Queue	

# Service Level Agreement (SLA)





Being nurtured

Never gonna buy

5

Improving Lead  
Scoring.

# What to change?

- 1 Did top prospects have the top scores?
- 2 Does content still have the same weight?
- 3 Is the lead score threshold still accurate?
- 4 What new types of activity increase customers?
- 5 Have you entered a new market? New products?



**Lead scoring,  
I got this.**

A better relationship  
between sales and  
marketing.

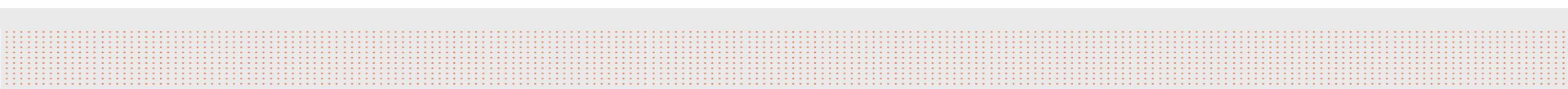




# QUESTIONS?



# EXTRA GOODIES



# 6 Advanced Lead Scoring.



1 Account Scoring

2 Using Big Data

