CHECKLIST

Scoring for Sales and Marketing Success

How and Why Lead and Conversion Scoring Can Make an Impact Across Your Organization

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Overview

In an industry almost built on buzzwords, “optimization” stands out at the top of the list for marketers.

It’s not a bad term. It’s certainly something marketers are striving for on a regular basis. The problem is, optimizing isn’t really the goal. What are you optimizing towards? That’s the goal. Often we’re optimizing for lower CPCs, higher volume of leads, or some other metrics we can easily point at in a dashboard. But what’s missing from many optimization efforts is quality. Not just increasing the quality of campaigns, but the quality of leads, the quality of Sales & Marketing collaboration, and the quality of customer experience. How do we start optimizing for quality, rather than traditional metrics? Scoring.

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2. How to build your first, or fifth, score.

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PART 1

Break it down: what is scoring?

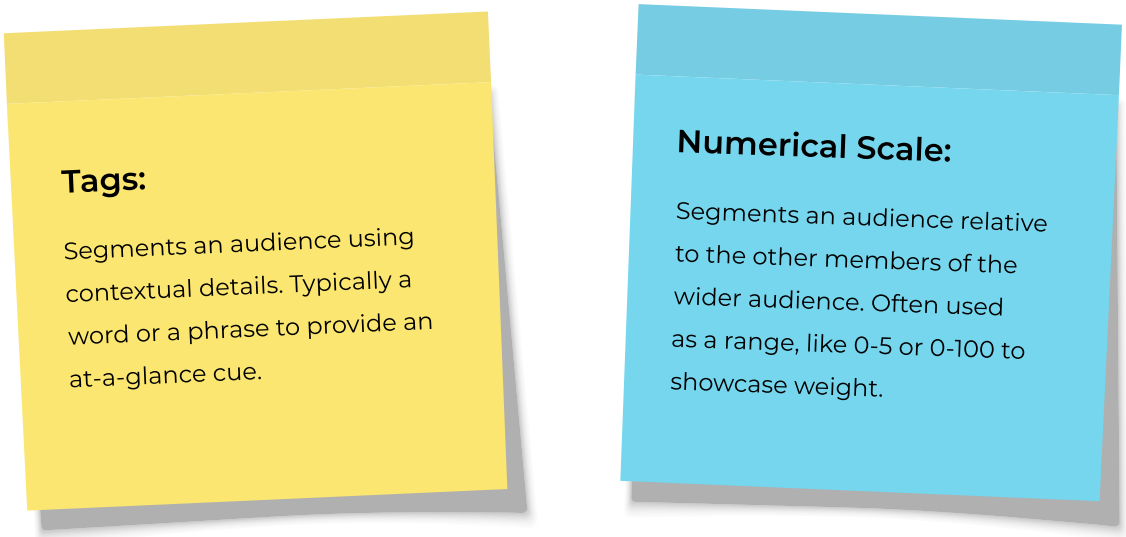
Scoring, at its core, is taking qualitative attributes and transforming them into something tangible and quantitative in order to make better decisions about the data set. As marketers get their hands on more and more data, it can get harder to find the opportunities and patterns in the flood of information. Scoring is a way to segment audiences based on firm numbers—built from fuzzy characteristics—so you can get more granular and systematic about your decisions.

Traditionally, scoring refers to "lead scoring," meaning assigning values to prospect characteristics and activities in order to facilitate the passing of a lead from Marketing to Sales.

It's designed to answer the question, "Is this lead ready to talk to Sales?" and might analyze poignant steps for your customers that differentiates who is qualified and considered ready to buy—or at least considering it—versus someone who still needs more time or is simply browsing content. You might use visit or conversation history or even simple metrics like whether they subscribe to your emails to score a lead higher or lower quality.

That's still a crucial piece of a scoring strategy that we'll detail later in this guide. But for modern marketers, a traditional inbound lead funnel isn't the only place we can use scoring to impact our performance. With emerging marketing strategies like Account Based Marketing (ABM), Conversational Marketing, and Omnichannel Communications, there are opportunities for scoring to impact multiple touchpoints in the customer journey.

Two regularly used flavors of scoring:



Scoring can add value and efficiency to any internal process where segmenting by quality or urgency improves operational decision making. With this example martech stack, there's multiple chances to implement scoring:

Chat
(Drift, Intercom)

Conversation qualification score of 0-3 to automatically sync conversations with your CRM

CRM & Automation
(HubSpot, Marketo)

Lead score to mark sales readiness and move leads through the funnel.

Attribution & Conversation Management (CTM)

Conversation and call scores to inform marketing campaigns, and automated tags to trigger follow up actions.

Customer success
(ChurnZero, Gainsight)

NPS score to provide product and brand feedback and fuel automated review campaigns.

PART 2

How to build your first, or fifth, score.

Effective scoring starts where most effective marketing does: setting a goal and knowing your audience. With scoring, you'll want to build a plan that accounts for each channel but is also in service of your team's overall goals. Let's say you've aligned goals with your sales team around a revenue number. One part of your journey to achieve those results could be to make sure Marketing is only delivering leads that Sales has a high likelihood of closing to reduce wasted effort and resources.

How do you know which lead has a high probability of closing? By developing an ideal customer profile or detailed buyer personas. Collect all the data you can. What characteristics do your customers have in common? What characteristics do your unqualified prospects have in common? Bring in data from as many sources as you have bandwidth for. Great insights will come from surveying or interviewing your customers. Do the same with your Sales team. Ask them what patterns they've been hearing from prospects they successfully close, lose to competitors, and mark unqualified. Use call recordings to verify assumptions and listen to customers and prospects in their own words.

A few easy things to look at:

Email domain

Are prospects with hotmail.com addresses more likely to be unqualified?

Location

Are there regions where you don't do business? Regions your customers are clustered in?

Company size

You likely have a niche you can place more emphasis on in scoring.

Engagement

Are they opening and clicking on emails? Have they viewed your pricing page?

Form fills

What forms have they submitted, and how many?

Conversations

Have they called or chatted with someone already?

Assign values to your findings.

For scoring that uses a numerical scale, the objective is to create decision points along the scale.

Using the goal from above, you might create a lead scoring scale from 0-100, where anything above a 50 enters a nurture campaign, and anything above 75 gets sent forward to the Sales team for direct outreach. How do you get from an ideal profile to a scale that actually produces results? Set a baseline, then regularly adjust based on feedback.

For the baseline, take attributes that your customers have in common and include those as positive scores. Add attributes that your unqualified leads have in common as negatives. The weight of each attribute can be a difficult task.

Your initial scoring parameters could look something like this:

Activity	Points
More than 20 pageviews	+10
Viewed pricing	+15
Email bounced	-100
Clicked an email link	+10
HQ in Canada, US, or South America	+25
Downloaded an eBook	+25
Weak email domain	-25
Initiated a phone call	+50
Submitted a demo request	+75

In this example, website activity (pageviews) is good, but an even better indicator of future success is downloading marketing materials (eBook) or requesting a product demo.

Assign low positive values to characteristics that are valuable, but could easily be achieved by low quality leads like 10 points for pageviews. The higher the purchase intent, like submitting a demo request, the higher your baseline score should be. Like in this example, the scores are telling a story. Here, the story is that website activity (pageviews) are good, but an even better indicator of future success is downloading marketing materials (eBook) or requesting a product demo. But none of that really matters if the lead provided bad contact information (email bounced). A valid email address might be a prerequisite for signing up for your service, so if an email bounces, make sure you're taking enough points away to, in essence, remove the lead from your funnel.

You will want to consider ranges within the segments, and place some maximums where it makes sense. 10 points for clicking an email makes sense, but it might not make sense to give 40 points for clicking on four different emails.

Gather a group of stakeholders to align, and agree on the score profile. Together, take real world examples of leads and apply your score set to test if it's achieving the desired results. Test a few everyone agrees aren't a good fit, then some that are current customers or qualified leads. If your new score wouldn't have sent forward the customers to Sales, scale back some of the negative qualities (or add additional positives). If a bunch of the unqualified leads would get sent to Sales, scale back some of the positive weighted scores. You don't want to make it too hard or too easy to reach your desired score. You want it to, as accurately as possible, reflect sales readiness.

CTM Inside Look:

In our own discovery, we had to walk back an assumption about form submissions. We assumed more form submissions meant more engaged, and more ready to buy. But looking at the data, more times than not, any more than three form submissions actually pointed to the opposite.

KEY TAKEAWAY

Be ready to challenge your assumptions.

CHECKLIST

Develop a scoring system

- [ ] Define the goal
- [ ] Map the intended impact
  - [ ] a. Inventory relevant tools and channels
  - [ ] b. Decide on scoring type, and where it will live
  - [ ] c. Identify key stakeholders
- [ ] Collect data on unqualified leads
- [ ] Collect data on customers
- [ ] Perform surveys and interviews
  - [ ] a. Sales team
  - [ ] b. Executive team
  - [ ] c. Customers
  - [ ] d. Prospects (if feasible)
- [ ] Analyze commonalities in customers vs. unqualified leads
- [ ] Build scoring baseline
- [ ] Test score on real-world leads/customers
- [ ] Agree and align with internal teams on process
- [ ] Collect ongoing feedback and tweak as necessary

PART 3

Situational scoring. A score for every purpose.

As we talked about above, traditional lead scoring isn't the only place to use scoring. There are numerous stops in the customer journey that can benefit from scoring. The benefits don't stop with the Marketing team either. While marketers typically own many scoring systems, there are situations where scoring is incredibly useful for Sales & Service teams, as well as agencies looking to make an impact for clients.

Next, we'll discuss four scoring scenarios:

- Scoring for the funnel
- Scoring for campaign optimization
- Scoring for customer experience
- Scoring for a competitive edge

Scoring for the funnel

This is the classic use case for lead scoring we've been talking through up to this point. Other than an explicit request to talk to Sales, how does a Marketing team know when a lead might be ready to purchase?

Why?

A score for moving prospects through the funnel gives you a way to automate, and validate, your process for determining Sales readiness.

How?

Split a scoring scale into equal parts, aligned to your qualification stages. Something like Subscriber (0-24 points), Lead (25-49 points), Marketing Qualified (50-74), Sales Qualified (75-100). When a prospect hits a score of 75, it's time to let Sales do their thing!

Who benefits?

If done right, the Sales team is going to win big with lead scoring.

The Marketing team owns lead scoring, in an attempt to create efficiencies for the Sales team. Sales is able to prioritize outreach based on score, and with accurate scoring, close rates and time-to-close should improve.

Another great benefit to lead scoring is Sales and Marketing have something to point to for troubleshooting "bad" leads, instead of pointing fingers. Aligning on scoring criteria can help bring teams closer together and work towards the same goals.

What else?

The focus on lead scoring is the Sales hand off. But scoring can impact more than that. Use your segments to drive your nurture campaigns. A prospect with a score of 50 might be ready for more robust content, FAQs, and other consideration materials while someone with a lower score would be ready for more educational and top of funnel articles.

Scoring for campaign optimization

For Marketers, we're often tasked with getting more from our campaigns, without spending anything extra. Scoring can help optimize campaigns by aligning your advertising with your high value prospects and conversions.

Why?

Good advertising relies on targeting the best audiences. With scoring, you're essentially segmenting your first-party data into targeted lists for outreach and lookalikes.

How?

There are many approaches to automating ad campaigns through a quality score. One great way is to have Sales and BDRs score conversions, e.g., inbound calls, form submissions, and chats, on a scale of 1-5. One being unqualified, five being a purchase. Coupled with detailed source attribution, you can push effort and budget towards quality, not just volume.

Who benefits?

The marketing team, and strategists executing the day-to-day optimizations, earn the biggest benefit of improved KPIs and efficiencies from automation.

What else?

Add automation to increase the value even more. Instead of a BDR scoring individual phone calls, you can create rules around your quality based on conversation attributes and even the words spoken. Maybe calls under 20 seconds automatically get scored a 1, or a score of 5 when Sales requests credit card information.

Using Call Scoring, we were able to determine which keywords were valuable and which ones weren't.

Kenny E.
Senior Analyst

Scoring for customer experience

Your customers are human beings, so we're not suggesting replacing personal connection and outreach with a faceless numerical score. Instead, use a form of scoring to improve their experience through contextual tagging.

Why?

Once someone becomes a customer, your job is to keep them happy with your product or service, and to keep them as customers. Scoring can help provide meaningful context to automate proactive outreach.

How?

Get started by using a speech analytics tool that can automate actions based on spoken words. Instead of numerical scores, you can "score" customer phone conversations with a contextual tag. An easy place to start would be to score based on sentiment.

Set up your criteria for what an at-risk customer might sound like (and the same for a happy customer!). Something along the lines of - if a caller uses words like "refund" or mentions a competitor, the call gets marked as "at-risk" and an automatic notification gets sent to a manager to review the call recording and escalate follow up.

Conversely, a customer using words like "love" and "incredible support" might get tagged "testimonial candidate" with a notification to Marketing for outreach.

Who benefits?

The intelligence gained by customer support and customer success teams will help prioritize outreach and make sure conversations are relevant beyond a generic check-in. And of course, happier customers are great for everyone, including the Marketing team, who gets a bigger pool to generate positive reviews, case studies, and partnership opportunities from.

What else?

Of course, NPS is the classic customer satisfaction score that can be used to segment customers. Depending on their response, you could have someone reach out individually, trigger a task for an account review, or make an ask for a testimonial.

Scoring for a competitive edge

If you're implementing the above scoring techniques internally, you're already giving your team a competitive advantage. You can expect decreased days-to-close, increased customer satisfaction, and increased results from paid campaigns. Scoring also gives agencies who support clients with their own competitive edge.

Why?

Reporting on lead volume, or increased impressions, clicks, etc, is something any agency can do. Working with your clients to implement scoring allows an agency to point to increases in quality, on top of other wins, to better show an agency's value.

How?

Rather than building a new scoring system, align with your clients to report on trends to existing scores. Drill down to what your team can impact, such as an average score for leads from Google Ads. Month-over-month and year-over-year. Consider using Google Data Studio to automate some of the reporting process and consolidate data sources.

Who benefits?

Reporting beyond vanity metrics will give any agency team a leg up, and help to avoid a client relationship going up for review. The additional context to reporting will also make your internal points of contact look like stars to their leadership, helping to keep a strong, lasting client relationship.

What else?

It can be tough to get clients to give agencies access to downstream data and tools to make the most out of scoring. Try to get buy-in with the above situational scoring descriptions, and help to do the heavy (billable!) lifting up front.

If you're still unable to get the access you need, there are other ways to use forms of scoring as an agency. Assign values to conversion events for the paid channels you're using. Use actual value if it's known, or relative value to simulate a weighting system. You'll still need buy-in from your client, but it's a much easier sell. You can then start reporting with additional color of value and quality. Reporting 10 conversions is one thing. Reporting $5,000 in conversion value is another.

CONCLUSION

Build. Report. Re-Build.

All the possibilities with scoring won't fit in one downloadable guide with four situational scenarios. This is a starting point, and hopefully serves as inspiration to start testing and building multiple scores within your customer's journey.

Once you build your first scoring process, the real fun begins. You'll collect continuous feedback from key stakeholders, keep listening to your customers, and adapt your scoring as new information becomes available. Report regularly, track accuracy, and explore expanding uses for your scoring. Anything that can benefit from quantifying quality, improving speed, or segmenting audiences is a candidate for scoring.

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Get a demo today of our industry-leading call tracking and communications platform to start integrating your calls and lead scores into your performance reporting.

Book a Demo

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