The Big List of Lead Scoring Rules

A Checklist of Over 250 Explicit and Implicit Lead Scoring Rules

Marketo®

The Big List of Lead Scoring Rules

Lead scoring is a shared sales and marketing methodology for ranking leads in order to determine their sales-readiness. Leads are scored based on the interest they show in your business, place in the buying cycle and their fit with regard to your business.

There are various ways a company can score leads. Either by assigning points, implementing rankings like A, B, C, or D, or using terms like "hot," "warm" or "cold." The key point is that by clarifying what exactly constitutes a sales-ready lead, marketing and sales can increase efficiency and productivity.

Explicit and Implicit scoring are two systems that can help you build a true picture of value. Explicit scoring is based on the information the prospect tells you. Implicit scoring is based on the information that you observe, or infer, such as their online behaviors.

The first step in lead scoring is to determine your ideal target. To create the ideal buyer profile, Sales and Marketing must both agree upon the definition. Use this checklist as a starting point to identify the key demographics that are relevant to your organization, as well as the key behavior-based scores to consider as well as the bad behaviors that deserve a negative score. We have listed more than 50 explicit scores and more than 200 implicit scores to help you find the ideal scoring rules for your company.

How to use this checklist:

Make copies of these pages for everyone who is going to help create your lead scoring model. Make sure to include some team members from sales and some from marketing. Have each person:

- Check off the boxes they think should be included in the lead scoring model.
- Next to each checked-off score, mark whether the attribute is critical, important, influential, or negative.

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50+ Explicit Scores to Consider

Potential individual-specific demographic scoring rules

- ☐ Title
- ☐ Role
- ☐ Purchasing authority
- ☐ Number of direct reports
- ☐ Level of manager (to whom do they report?)
- ☐ Years of experience
- ☐ Specialties
- ☐ Type of email used (Gmail, corporate, Yahoo)
- ☐ Years at current position
- ☐ Designations/Certifications
- ☐ Honors and awards received
- ☐ Social network participation
- ☐ Social network connections
- ☐ Social network influence
- ☐ Public recommendations
- ☐ Affiliations - groups and associations
- ☐ Career interests
- ☐ Personal interests
- ☐ Degrees received

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Potential company-specific demographic scoring rules

- ☐ Rankings/Stock Indexes: Fortune 500/Inc 500, etc
- ☐ Number of employees
- ☐ Company revenue
- ☐ Revenue growth (growing, declining, etc)
- ☐ Company financial viability
- ☐ Number of divisions
- ☐ Number of products sold (SKUs)
- ☐ Location
  - ☐ City
  - ☐ State
  - ☐ Zip
  - ☐ Country
  - ☐ Phone area code
  - ☐ Headquarters or satellite
  - ☐ Location of branches
  - ☐ Size of branches
- ☐ Website traffic
- ☐ Website plug-ins
- ☐ Year founded
- ☐ Organizational structure (proprietorship, partnership, corporation)
- ☐ Geographic markets served
- ☐ Competitors
- ☐ Partners
- ☐ Fiscal year end
- ☐ Industry

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Relationship scoring rules

- ☐ Account type (Potential vs. Actual)
  - ☐ Customer
  - ☐ Partner
  - ☐ Competitor
  - ☐ Prospect
  - ☐ Investor
- ☐ Previous relationship
  - ☐ Ex-customer
  - ☐ Lost opportunity
- ☐ Product(s) purchased
- ☐ Complimentary technologies used (CRM, ESP, ERP, CMS, MRM, MA)
- ☐ Recycled count
- ☐ Lead source
  - ☐ Website
  - ☐ Sponsorship
  - ☐ PPC
  - ☐ Content syndication
  - ☐ Online ad
- ☐ Budget defined (Monthly, Quarterly, Annually)
- ☐ Timeframe (Project completion deadline)

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Did everyone in Sales and Marketing mark the same attributes? Discuss any that don't match and then compare to the reporting and buyer personas you have created. Do the demographics match your personas and the data in your reports? If not, discuss these with the group.

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200+ Behavior-Based Scores to Consider (continued)

Livestreamed events
- [ ] Registered for
- [ ] Viewed
- [ ] Commented during
- [ ] Asked question during
- [ ] Reviewed follow-up recording
- [ ] Rated event

Surveys
- [ ] Visited
- [ ] Completed
- [ ] Viewed results
- [ ] Participated in multiple surveys

Tradeshow
- [ ] Attended
- [ ] Visited booth
- [ ] Watched demo
- [ ] Attended multiple tradeshows

Roadshow/Seminar
- [ ] Registered
- [ ] Attended
- [ ] Attended multiple events

Microsites
- [ ] Viewed
- [ ] Shared via social sharing

Web pages
- [ ] Viewed landing page
- [ ] Fills out form on landing page
- [ ] Uses instant chat functionality
- [ ] Uses request a call back functionality
- [ ] Viewed - any
- [ ] Viewed - product specific
- [ ] Viewed - pricing
- [ ] Viewed - customers or reviews
- [ ] Viewed - multiple web pages
- [ ] Viewed - multiple web pages in 1 WK
- [ ] Shared via social sharing
- [ ] Browser used

Search Activity
- [ ] Searches for company name
- [ ] Searches for product name
- [ ] Searches other (scored on term)
- [ ] Search engine used

Online courses
- [ ] Viewed information on
- [ ] Registered for
- [ ] Completed
- [ ] Registered for multiple
- [ ] Completed multiple

Certifications
- [ ] Viewed information on
- [ ] Registered for
- [ ] Received certification
- [ ] Received multiple certifications

Community
- [ ] Submitted an idea
- [ ] Submitted multiple ideas
- [ ] Read about best practices
- [ ] Read about ideas
- [ ] Visit knowledge base
- [ ] Read about product information
- [ ] Asked a question
- [ ] Asked multiple questions
- [ ] Answered a question
- [ ] Answered multiple questions
- [ ] Shared a best practice
- [ ] Shared multiple best practices

Podcasts
- [ ] Listened
- [ ] Listened multiple times
- [ ] Downloaded
- [ ] Subscribed

Videocasts
- [ ] Viewed
- [ ] Viewed multiple times
- [ ] Downloaded

Additional Behaviors
- [ ] _____
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Bad Behaviors (Implicit data)

While most activities give positive scores, there are actions that do the opposite. Activities that deserve a negative score may include:

- [ ] Email unsubscribe
- [ ] Non-product web visit
  - [ ] Career page
  - [ ] Press room
  - [ ] Investor page
  - [ ] Leadership page
- [ ] No website activity for a long period of time
- [ ] Change in purchase timeframe
- [ ] No progression in buying cycle
- [ ] Added to "Do Not Call" list
- [ ] Spam complaint
- [ ] Negative social media comment
- [ ] Declines contract/warranty renewal

Don't ignore negative scoring attributes when building your model. Use them to your advantage in conjunction with other scoring methods.

Resources:

To get **The Definitive Guide to Lead Scoring**
visit: www.marketo.com/dg2-lead-scoring

To get **The Definitive Guide to Lead Nurturing**
visit: www.marketo.com/dg2-lead-nurturing

To get **The Definitive Guide to B2B Social Media**
visit: www.marketo.com/dg2-b2b-social-media

About Marketo

Marketo is the revenue performance management company, transforming how marketing and sales teams of all sizes work — and work together — to accelerate predictable revenue. Marketo's solutions are both powerful and easy to use, providing explosive revenue growth throughout the revenue cycle from the earliest stages of demand generation and lead management to deal close and continued customer loyalty.

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