



Kentico

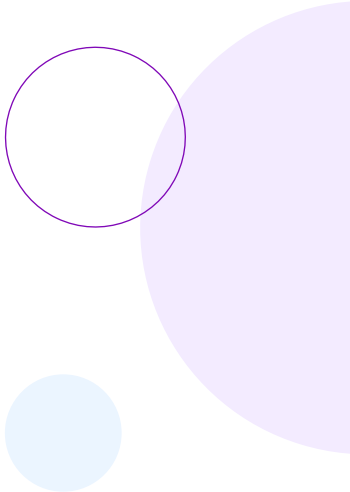


Quick start guide

Lead scoring.

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Contents.



What is lead scoring?	3
Why do I need lead scoring?	3
What lead scoring is NOT	3
Lead scoring – basic techniques	3
Lead scoring – advanced techniques	4
Lead scoring optimization	4
Top resources	4
 Lead scoring in Kentico Xperience 13.	 5
What Is an Attribute-Based Rule?	7
What Is an activity-based rule?	7
What Is a macro-based rule?	8
Not desired characteristics or behavior	8

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

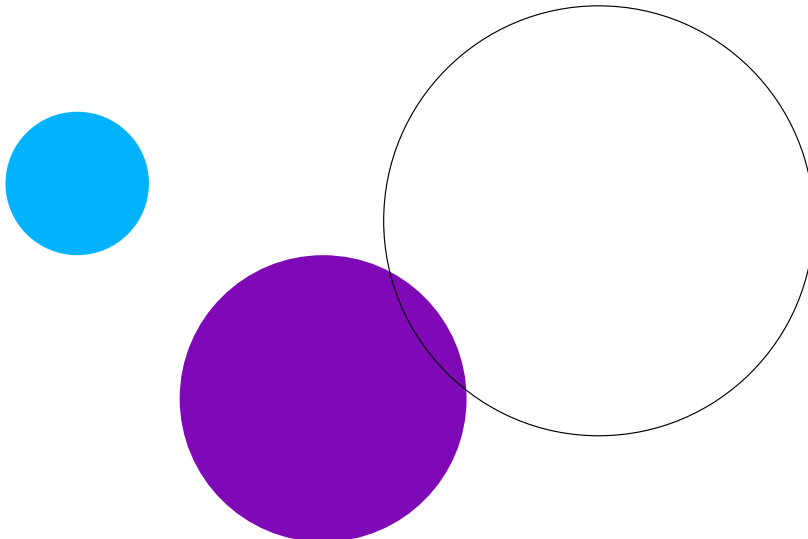
- Assign rules based on activity data such as adding items to a shopping cart and participating in a forum.
- Assign lead scoring rules based on the online behavior of anonymous and known visitors.
- Explore multiple scoring scenarios to gain greater insights into a lead's level of interest in different 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

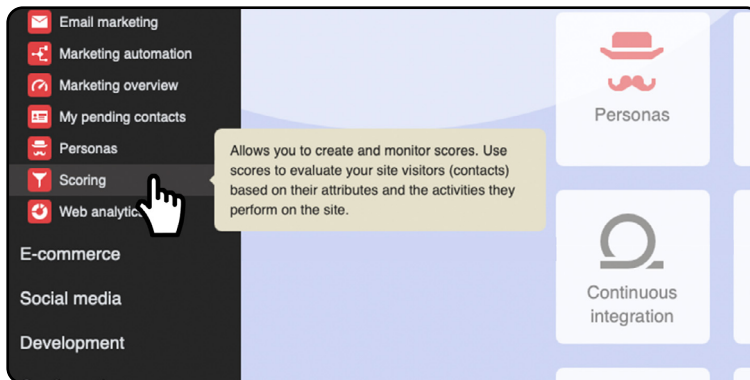
[Identify high-quality leads with automated lead scoring](#)



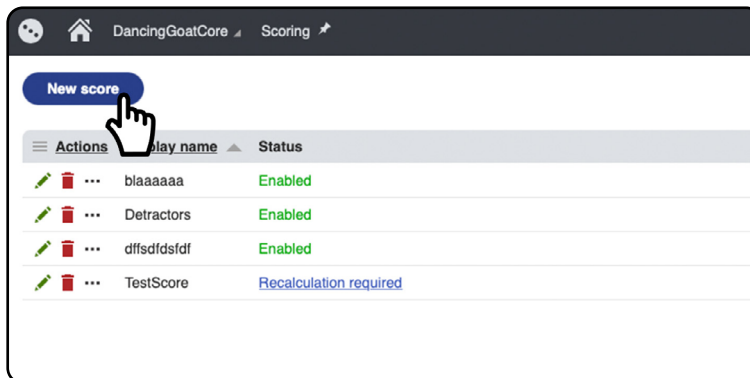
Lead scoring in Kentico Xperience 13.

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

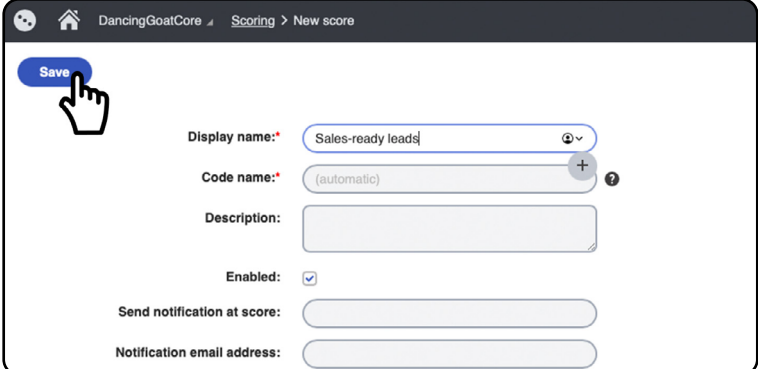
1. In the administration interface, open the Applications list and click **Scoring** under the Online Marketing category.



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.

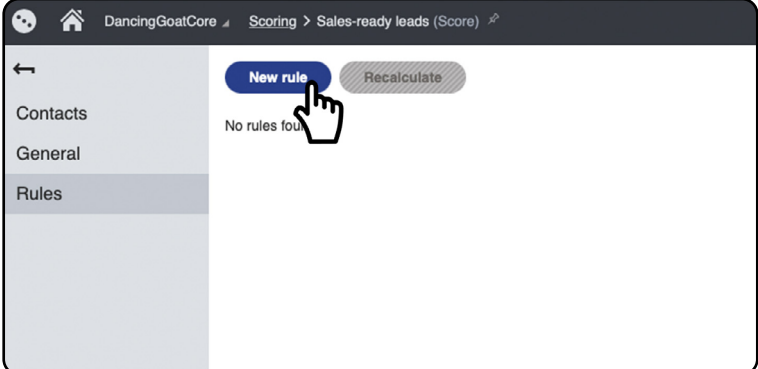


The screenshot shows the 'New score' form in the DancingGoatCore application. The breadcrumb trail is 'DancingGoatCore > Scoring > New score'. A blue 'Save' button is highlighted with a hand cursor. The form contains the following fields:

- Display name:** A text input field containing 'Sales-ready leads'.
- Code name:** A text input field containing '(automatic)'.
- Description:** A large text area.
- Enabled:** A checkbox that is checked.
- Send notification at score:** A text input field.
- Notification email address:** A text input field.

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

4. Select the Rules tab and click New rule.



The screenshot shows the 'Sales-ready leads (Score)' page in the DancingGoatCore application. The breadcrumb trail is 'DancingGoatCore > Scoring > Sales-ready leads (Score)'. On the left, a sidebar menu has 'Rules' selected. In the main area, a blue 'New rule' button is highlighted with a hand cursor. Below it, the text 'No rules found' is visible. A grey 'Recalculate' button is also present.

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.

Scoring > Sales-ready leads > New rule

Save

General

Rule name:*

Provided an email address

Score value:*

15

Rule type:*

☒ Attribute ☐ Activity ☐ Macro

Rule settings

Attribute:

Address

Condition:

Contains

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.

Scoring > Sales-ready leads > New rule

Save

General

Rule name:*

Subscribed to the Daily Digest newsletter

Score value:*

10

+

Rule type:*

☐ Attribute ☒ Activity ☐ Macro

Rule settings

Activity:

Subscription to a newsletter

Activity details

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.

Scoring > Sales-ready leads > New rule

Save

General

Rule name:

Purchased 2 and more products in last 30 d...

Score value:

15

Rule type:

Attribute

Activity

Macro

Rule settings

Macro:

Contact has purchased at least 2 product(s) in the last 30 day(s)

Edit

Clear

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.

Scoring > Sales-ready leads > New rule

Save

General

Rule name:

Has not visited the site in the last 60 days

Score value:

-15

Rule type:

Attribute

Activity

Macro

Rule settings

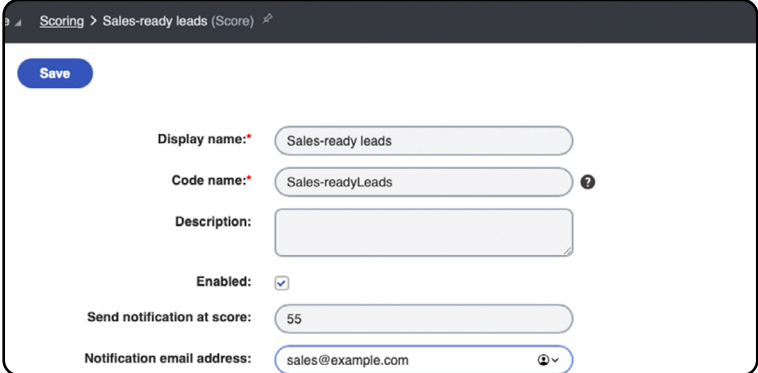
Macro:

Contact has visited site DancingGoatMvc in the last 60 day(s)

Edit

Clear

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

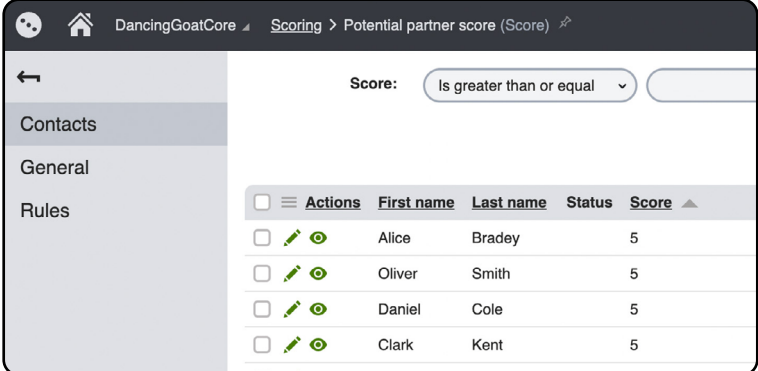


The screenshot shows a configuration form for a scoring rule named 'Sales-ready leads (Score)'. The form includes a 'Save' button at the top left. The fields are: 'Display name' (Sales-ready leads), 'Code name' (Sales-readyLeads), 'Description' (empty), 'Enabled' (checked), 'Send notification at score' (55), and 'Notification email address' (sales@example.com).

Field	Value
Display name	Sales-ready leads
Code name	Sales-readyLeads
Description	
Enabled	<input checked="" type="checkbox"/>
Send notification at score	55
Notification email address	sales@example.com

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 screenshot shows the 'Potential partner score (Score)' configuration form and the 'Contacts' tab. The form includes a 'Score' dropdown set to 'Is greater than or equal'. The 'Contacts' tab shows a table of contacts with their scores.

Score	Is greater than or equal

Contacts	General	Rules

Actions	First name	Last name	Status	Score
<input type="checkbox"/>	Alice	Bradey		5
<input type="checkbox"/>	Oliver	Smith		5
<input type="checkbox"/>	Daniel	Cole		5
<input type="checkbox"/>	Clark	Kent		5



**The DXP that
helps you grow.**



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