Client Name Withheld Lead Scoring

This presentation walks through the methodology and process for lead scoring at Client Name Withheld. Everything you need to get the best, most engaged leads into the Sales team's hands.

Focus Areas

- Scoring Definitions
- Scoring Matrix
- Sales Handoff & Enablement
- Timeline & Next Steps

Foundational Excellence

PLANNING

Planning revenue is essential for every company. We'll build tools and processes that enable accurate predictions.

GOVERNANCE

Tools and processes ensure systems and data are kept safe. We'll enable a culture that protects its insights and mitigates risk.

ANALYTICS

Accurate reports and dashboards are essential for every employee. We'll build insights that keep teams engaged and informed.

ALIGNMENT

When friction between teams is reduced everyone can work smarter. We'll work to ensure everyone on Marketing, Sales, Customer Success, Legal and Finance share data and understand processes.

Company Benefits of Lead Scoring

Lead Scoring Process Delivers

TRANSPARENCY

No illusion of agreement between sales & marketing. A definition of all stages and agreed upon ownership.

SCALABILITY

A process easily adoptable by all teams that will scale not only with an increase in team size, but an increase in lead flow

MEASUREMENT

Scalable system built in such a way that all teams have the metrics needed to take action and continue iterating… in the right direction.

EFFICIENCY

An automated process of identifying MQLs and sending to Sales for follow up. Enables Marketing to get feedback from Sales to optimize handoff.

Scoring Definitions

Scoring Definitions

- Activity
- Inactivity
- Demographic

MQL Definitions

- Handraisers/Fast Track
- Scoring threshold
- Exclusion List

DEFINITION OF DEMOGRAPHIC SCORE

DEMOGRAPHIC SCORE	DEFINITION	RANGE*	COUNT
A	Highest level of demographic fit	80+	1,674
B	Good Demographic Fit	60-79	9,570
C	Decent Demographic Fit	45-59	9,126
D	Poor Demographic Fit	25-44	23,004
Q	Low or no demographics, not engaged	<24	8,391

*Highest Score achievable for demographic is 100

**updated 11/17/2017*

DEFINITION OF BEHAVIORAL SCORE

BEHAVIORAL SCORE	DEFINITION	RANGE
1	High Level of Engagement	90-100+
2	Mid Level of Engagement	49-89
3	Low Level of Engagement	25-49
4	Minimal Level of Engagement	1-24
0	Not Engaged	0

*Behavioral Score can be over 100 but never under 0 (regardless of negative scoring.

Scoring Matrix

Lead Scoring Matrix Recommendation

Demographic

A1	A2	A3	A4	A0 (1674)
B1 (1)	B2 (5)	B3	B4 (1)	B0 (9563)
C1 (4)	C2 (5)	C3	C4 (1)	C0 (9116)
D1 (164)	D2 (165)	D3 (14)	D4 (3)	D0 (22865)
Q1 (41)	Q2 (85)	Q3 (6)	Q4 (3)	Q0 (8256)

Behavioral

HOT

WARM

COLD

ALPHA = Demographic
NUMERIC = Behavioral

**updated 11/17/2017*

Client Name Withheld - CURRENT DATABASE BREAK OUT AND MQL DEFINITIONS

MQL STATUS	DEMOGRAPHIC SCORE	COUNT
HOT	A	1,674
WARM	B, C	18,696
COLD	D,Q	31,438

**updated 11/17/2017*

NOTES:

- Currently there is not enough behavioral activity to provide scoring.
  - Kick off will only be based on Demographic score
  - Going forward it will be based on matrix scores
- New fields in SFDC needed (open to Marketo User) (Lead & Contact Table)
  - MQL Status (dropdown)
    - Hot
    - Warm
    - Cold
  - Lead Score
  - MQL Status Datestamp

Sales Handoff

Lead Scoring & Sales

- Sales Handoff
  - Alert them - which system
  - What info to show
- SLA & Monitoring Process
- Enablement
  - Kickoff/Enablement Materials
  - Feedback Loop (rejected reasons/easy feedback loop)

PROCESS RECOMMENDATION FOR “HOT” HANDOFF

Handraiser or Lead Status Qualification

MQL status = HOT

Alert to Lead Owner/SDR, Marketing

Task Assigned SFDC to Lead Owner

Alert contains:

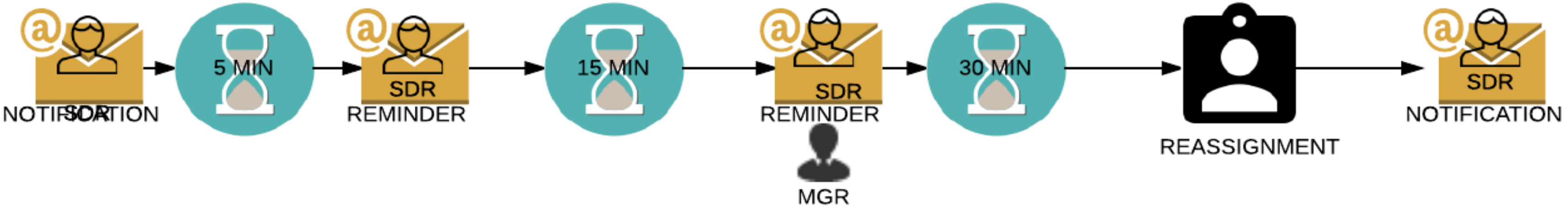
- Reason for HOT (Hand Raiser, etc)
- First Name
- Last Name
- Company
- Phone Number
- Email Address
- Link to SFDC
- Date of Action

Additional Recommendations:

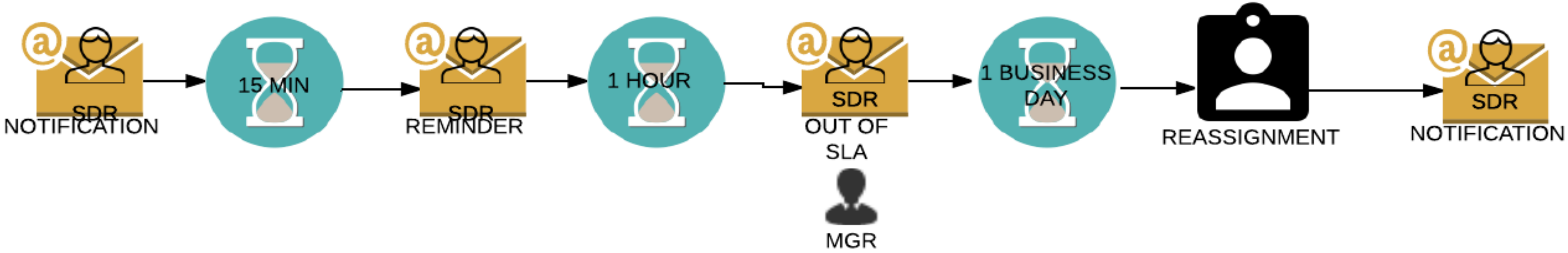
- Create views in SFDC based on MQL Status
- Have SLA included in the task as well as the Alert

SLA FLOW

TRIP ACTIONS REQUESTED FLOW



GO NIMBLY RECOMMENDED



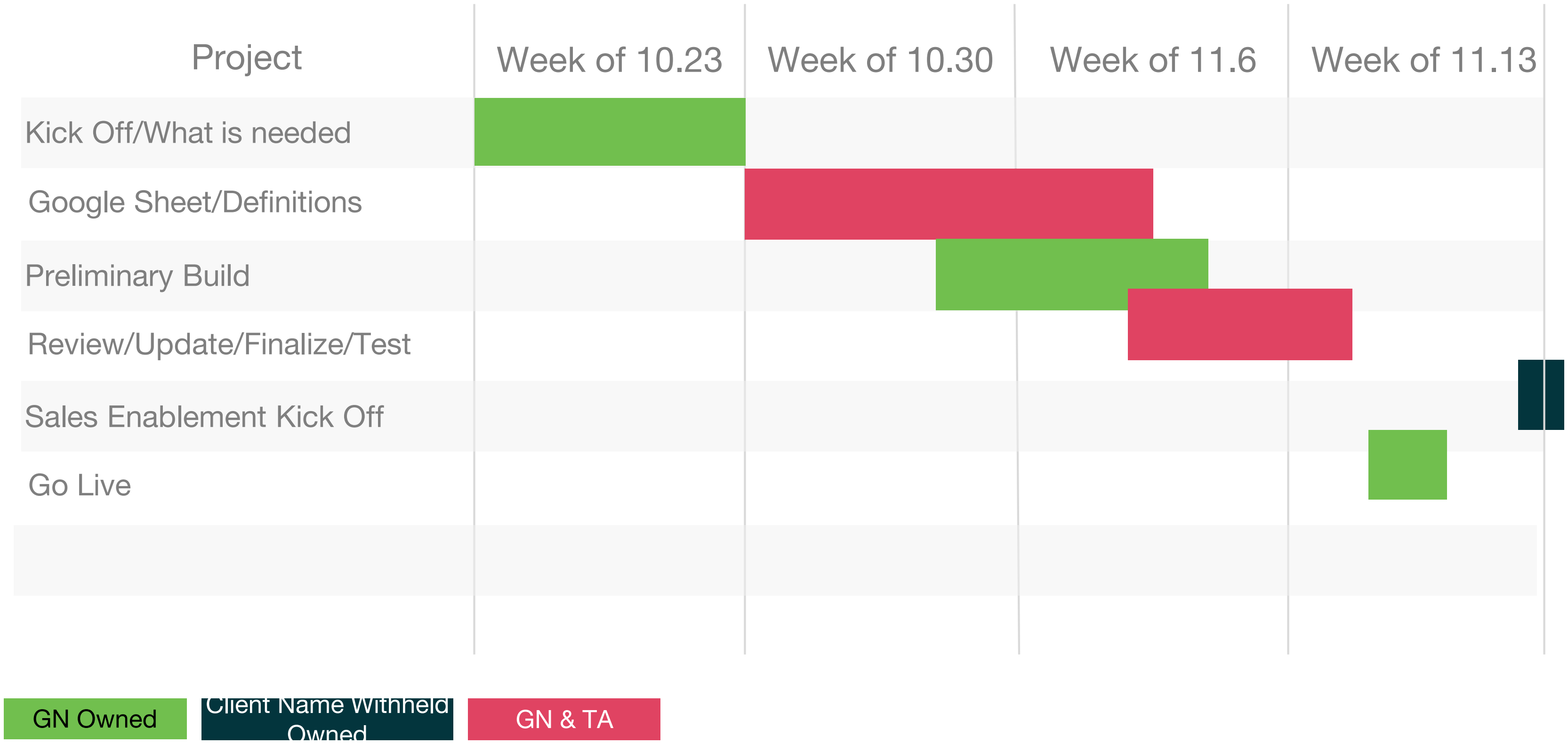
There are some limitations to the requested flow - Marketo/SFDC sync can take up to 15 minutes depending on what when a field is updated so a 5 minute reminder could be sent to those that have already completed the required action and taking into account the human factor (meetings, lunch, etc) upping the time on the out of SLA and reassignment is recommended.

Notifications & reminders will be sent out of Marketo but reassignment will need to be done in SFDC (considering volume - manual might be the best way to go for now).

Timeline & Next Steps

Timeline of Lead Scoring

Example Generic Scoring

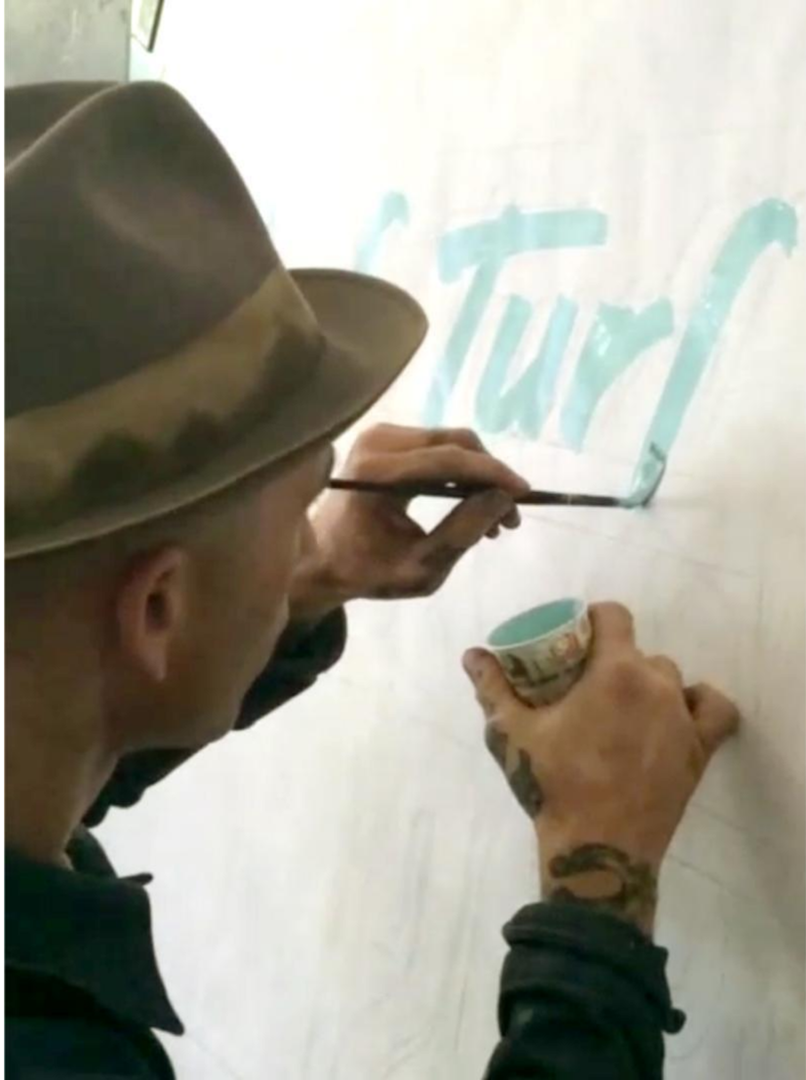


Next Steps and Required Meetings

- Next Steps:
    - ~~Completion of Google Sheet for Demographic/Behavioral~~
    - ~~Finalized and approved definition of MQL~~
    - ~~Final Approval for definition of HOT/WARM/COLD~~
    - ~~Preliminary check of scores to determine volumes~~
    - Client Name Withheld to provide SLA & Monitoring process for feedback by GN
- Required Meetings
    - ~~Review of completed google sheet~~
    - ~~Preliminary Score Review~~
    - Final Review/Pre Launch
    - Marketo Handoff

Phase II Recommendations

- Revenue Lifecycle and Reporting
- Review and revision:
  - 1st 4 Months
  - Every 6 Months post
  - New product launch
  - Revised Target Market
- Integrated Engagement Programs based on Lead Score



Post Deployment Action Items

- Add new fields to appropriate SFDC layouts
  - Recommendations:
    - Sales
      - MQL Status
      - MQL Status Timestamp
    - Marketing
      - MQL Status
      - MQL Status Timestamp
      - Lead Score Demographic
      - Lead Score Behavioral
- Need Final on Who is building:
  - Alerts
    - Emails
    - Campaigns
  - SLA Monitoring
    - Reports (SFDC)
    - ReAssignment Triggers
- Update Programs (Templates) to reflect new statuses for scoring.

Thank You

FAQs

Do I need both Lead Scoring & Predictive?

YES! Lead Scoring allows you to report on the success of your marketing efforts as well as allows for a back up to predictive.

1-100, A-D, 1-4, Hot, Warm, Cold - do we need to have all of these? Why not just HOT, WARM, COLD?

It is complicated, but having these different levels allows for flexibility and control. You can make “warm” bigger (this is great if you are ramping up a sales team) or narrow “Hot” because sales is overwhelmed by the sheer volume of great leads Marketing is sending over.

When should we loop sales into this process?

This really depends on the relationship between the two teams, but sooner rather then later, open, transparent, relevant conversations are always good. Recommend keeping it high level until you get to the SLA, Monitoring, Communication process. As you get your roll out program finalize, recommend that a fully baked sales roll out plan be presented to Sales leadership (including dates, communications, training, etc) for approval (and input)

How long is this process?

This is dependent upon factors like getting all the data back to build preliminary score models, decisions made, meeting schedules , roll out timelines, etc.