



The A-Z of Getting Started with Lead Scoring

An introduction to Scoring in Marketo Engage

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Agenda

- Core Marketo Score Product Fundamentals
- Examples of Value-Adding Scoring Models, and Use Cases on Action from Models
- Q&A + What Scoring Initiatives are you working on?!

Core Marketo Score Product Fundamentals

 01. The Score Field Type

 02. Program Build, Including My Tokens

 03. What you can Score On

01. The Score Field(s)

Field Actions ▾ New Custom Field Export Field Names

New Custom Field

Object: * Lead ▾

Type: * Score ▾

Name: * mkto_Behavior Score

API Name: * mktoBehaviorScore

★ 1 - Change Score

Add Choice

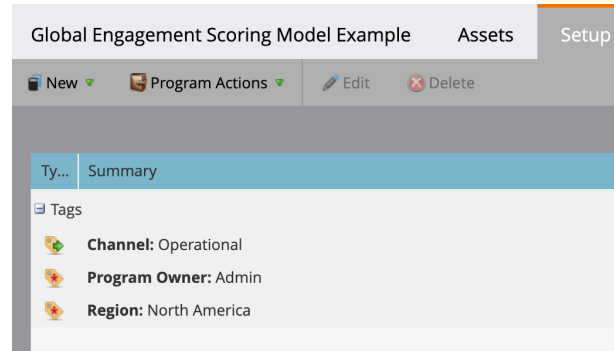
Score Name: Lead Score ▾

Change: +20, -5, =50, and so on ▾

- Lead Score
- mkto_Behavior Score
- mkto_Demographic Score
- mkto_Total Person Score

02. Program Build & Value of Tokens

- Build Program
 - Recommended Channel: Operational



- Build Score Tokens each activity you'd like to track

The screenshot shows the 'Global Engagement Scoring Model Example' interface with the 'My Tokens' tab selected. The top navigation bar includes 'Assets' and 'Setup'. Below the navigation bar, there are buttons for 'New', 'Program Actions', 'Edit Token', and 'Delete Token'. The main content area displays a message: 'These tokens can be referenced using this naming convention: {{my.My Token}}'. Below this message is a table with columns for 'Token Name', 'Value', and 'Updated'.

Ty...	Token Name ▲	Value	Updated
Local (10 Tokens)			
★	{{my.Attends Event}}	+20	Mar 23, 2020 11:48 ...
★	{{my.Attends Webinar}}	+5	Mar 23, 2020 11:59 ...
★	{{my.Clicks Email}}	+1	Mar 23, 2020 11:55 ...
★	{{my.Fills out Contact Us Form}}	+50	Mar 23, 2020 11:55 ...
★	{{my.Fills out Demo Form}}	+20	Mar 23, 2020 11:55 ...
★	{{my.Fills out Gated Content Form}}	+5	Mar 23, 2020 11:55 ...
★	{{my.Fills out Other Form}}	+2	Mar 23, 2020 11:55 ...
★	{{my.Key Web Page Visit 10 Times in ...}}	+3	Mar 23, 2020 11:59 ...
★	{{my.Registers for Live Event}}	+10	Mar 23, 2020 11:57 ...
★	{{my.Registers for Webinar}}	+2	Mar 23, 2020 11:59 ...

02. Program Build

- Build Smart campaigns for each activity you'd like to track

The screenshot shows the 'Smart List' configuration interface. At the top, there are tabs for 'Attends Live Event', 'Smart List', 'Flow', 'Schedule', and 'Results'. Below the tabs, there are options for 'New', 'Campaign Actions', and 'View Campaign Members'. A toolbar includes 'Use ALL filters', 'Collapse All', and 'Expand All'. The main configuration area is titled 'Program Status is Changed' and contains the following settings:

- Program: is any
- New Status: is
- Live Event > Attended

An 'Add Constraint' button is visible on the right side of the configuration area.

The screenshot shows the 'Flow' configuration interface. At the top, there are tabs for 'Attends Live Event', 'Smart List', 'Flow', 'Schedule', and 'Results'. Below the tabs, there are options for 'New', 'Campaign Actions', and 'View Campaign Members'. A toolbar includes 'Collapse All' and 'Expand All'. The main configuration area is titled '1 - Program Status was Changed' and contains the following settings:

- Program: is any
- Date of Activity: in past
- 1 day
- New Status: is
- Live Event > Attended

An 'Add Constraint' button is visible on the right side of the configuration area.

The screenshot shows the 'Flow' configuration interface. At the top, there are tabs for 'Attends Live Event', 'Smart List', 'Flow', 'Schedule', and 'Results'. Below the tabs, there are options for 'New', 'Campaign Actions', and 'View Campaign Members'. A toolbar includes 'Collapse All' and 'Expand All'. The main configuration area is titled '1 - Change Score' and contains the following settings:

- Score Name: mkto_Behavior Score
- Change: {{my.Attends Event}}

An 'Add Choice' button is visible on the right side of the configuration area.

03. What you can Score on

- Standard Marketo Activity, Such As:
 - Clicks Link in Email
 - Visits Web Page
 - Program Status Changes
- Field Values on your Person Record
 - Job Title / Job Function
 - Industry
 - Purchase History
 - CRM / EDW Data Points
- Custom Activities

The screenshot displays the Marketo interface. On the left, a list of Tag Types is shown, including Channel, Direct Mail, Email - Batch, Email - Trigger, Live Event, Newsletter, Nurture, Online Advertising, Operational, Social, Tradeshow, Web Content, Web Form, and Webinar. On the right, a configuration modal is open for the 'Direct Mail' channel. The modal shows the following settings:

- Channel: Direct Mail
- Applies to: Default
- Analytics Behavior: Inclusive (regardless of period cc)
- Program: (empty)

Below the program settings, there is a table for program steps:

To reorder, change the step number

Status	Step	Success	Hide	Delete
01 Member	10	<input type="checkbox"/>	⊖	✖
02 Engaged	20	<input checked="" type="checkbox"/>	⊖	✖

An 'ADD STEP' button is located at the bottom right of the table.

Example Scoring Models

- Use Case: Managing the Engagement of your Database or Create a Threshold for Sales Lead Handoff
 - 3 Score Fields: Behavior + Demographic + Total Score
 - Build two Programs: One to manage Behavior and one to manage Demographic. Manage tokens at either the folder level or within the specific program.

- Use Case: Need to Provide Sales with more Targeted Product Category Information on their follow up and/or More Targeted Marketing Content
 - Create Product Based Scoring Fields (Can use Behavior and/or Demographic) Based on your organization's product category needs
 - Example: Marketo Product Categories - Core Product, Advanced Reporting, Sales Enablement Features, Attribution

Q&A



Adobe