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Build Lead Scoring in Marketo

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You may have many leads in your database, but how do you know which ones are ready to buy your products/services now? Lead scoring helps you identify the people who are most engaged with your company and are the right fit so that you can share those leads with your sales team and close deals!

This worksheet will help you determine which activities and characteristics are important indicators that a prospect is interested in purchasing (behavioral scoring) and is the right fit for you (demographic scoring).

EXERCISE 1

DETERMINING BUYER INTEREST WITH BEHAVIORAL SCORES

Behavioral scoring relates to the trackable actions a prospect takes that indicate interest in your products and intent to buy. For example, visiting the website shows interest, visiting the pricing page may show intent, but visiting the careers page may indicate the person is not going to purchase.

1. Make a list of prospect activities that matter to your sales process or are valuable to the company. Then list actions that indicate a prospect is not interested in your product. Be sure to list activities that are trackable through Marketo.

    Note: Ask your sales team which activities indicate a good or bad lead to them. This will help you align with sales and prioritize based on their observations of closed deals.

EXAMPLE

Activities indicating interest/intent to buy	Activities indicating NO interest/intent to buy
Visit pricing page	No interaction in last 90 days
Attend annual customer event	Visit careers page
Register for webinar	
Download white paper	
Fill out request a demo form	

Activities indicating interest/intent to buy	Activities indicating NO interest/intent to buy

2. Choose a sales handoff threshold score. Once a lead indicates enough interest through the above activities (in other words, once the lead's total score hits this threshold), you will hand them off to sales. This threshold will simply be a number that helps set a benchmark for the scores you assign to individual behaviors.

Make sure that this threshold number is large enough that a lead needs to complete multiple interactions with your brand in order to meet it. After all, you don't want someone to become qualified off of just one email open! If you're just starting out, try working with a threshold of 100 and building out your lead scoring from there.

Keep in mind that scoring is an iterative process! What you build today isn't set in stone forever, and you'll want to revisit and tweak the numbers over time.

Note: If you have any existing data around your recent sales deals, dive into it and see what actions people took in successful deals. This can help you to determine how many touchpoints go into a qualified sales lead and help you extrapolate from there what your threshold number should be.

EXAMPLE

Average number of touchpoints for qualified lead:

4

Threshold for sales handoff:

50

YOUR TURN

Average number of touchpoints for qualified lead:

Threshold for sales handoff:

3. Assign a score to each activity listed in Exercise 1a. Use a positive behavior score for the activities that indicate interest in order to boost a prospect's overall lead score, and a negative score to indicate disinterest. Using your threshold from Exercise 1b as a benchmark, determine your behavior scores relative to the importance of their actions.

For example, because prospects who request a demo should go right to sales, you should assign that action a point value equal to your prospect handoff threshold. However, downloading a white paper is not as strong an indicator of interest, and therefore should be worth fewer points.

EXAMPLE

Threshold for sales handoff = 50 points

ACTIVITY	SCORE
Filled out "request a demo" form	+50
No interaction in last 90 days	-10
Download white paper	+5
Visit us at a tradeshow	+15

YOUR TURN

Threshold for sales handoff = _____ points

ACTIVITY	SCORE

Congrats! You've put together a basic behavioral scoring model.

EXERCISE 2

FINDING THE RIGHT FIT WITH DEMOGRAPHIC SCORES

Activity is only part of the story - if a prospect's profile doesn't fit with your product, they may not be a good lead to hand over to your sales team. Demographic scores are based off of a prospect's characteristics. It's important to assign behavioral and demographic scores so that sales can determine the best leads in terms of both fit and interest.

1. Make a list of characteristics for your ideal prospects. Consider listing attributes such as their industry, company, department, and role. Be sure that these characteristics correspond to available demographic fields in your Marketo instance.

    Note: Work with sales to help you determine which leads respond most to their inquiries and are most involved in opportunities.

2. Assign a score to each characteristic according to its relevance in your ideal prospect profile. Use positive scores for desirable traits and negative scores for traits that make the lead less of a fit for your product.

EXAMPLE

CATEGORY	IDEAL PROSPECT CHARACTERISTICS
Industry	Aerospace, Manufacturing
Company Size	100-999, 1,000-9,999 employees
Job Title	Director, Vice President, C-Level
Department	HR

YOUR TURN

CATEGORY	IDEAL PROSPECT CHARACTERISTICS
Industry	
Company Size	
Job Title	
Department	

CHARACTERISTIC	SCORE
Industry - Aerospace	+10
Industry - Manufacturing	+5
Company size - 100-999	+5
Company size - 1,000-9,999	+10
Company size - <10	-10

YOUR TURN

CHARACTERISTIC	SCORE

Congrats! You've put together a basic demographic scoring model.

NOW TRY THIS IN MARKETO!

Take the lead scoring system you've outlined here and build out your lead scoring in Marketo. Check out **this video** to get started.

- If you have a subscription that allows you to import a pre-made program, search for an existing lead scoring program and **import it into Marketo**.

- Don't forget to test once you've built out your program! Go to your demo form, fill it out with a test email, and check your test lead's score in Marketo.

- After you build your model, consider **setting up an alert** to go out to sales once the lead's score has reached your sales handoff threshold.

Got any questions? Check out discussions or post your questions in the **Community**!