The Marketing Rockstar's Guide to Marketo

How to Build a Lead Scoring System
Survey Your Sales Team with The Likelihood to Call Ranking

The Lead Scoring Survey to Keep Marketing Engaged with Sales.

Instead of basing your lead scores on what you think you know, just ask your sales team! You should use their relative rankings, especially of behaviors, as a basis for the scores you put into Marketo. Once complete, you should back test scores against Won and Lost opportunity data if possible.

The survey is designed to elicit Sales' relative ranking of individual demographics and behaviors to program into the lead scoring system. The idea behind the "likelihood to call ranking" is to discover how excited each sales person in *your firm* is to call an organization, title, department, function, etc.… based entirely on a *single* criteria.

I want to point out that you should include positive and negative demographics and behaviors because you will program both into Marketo. Some negative behaviors may not be as negative as you think for the Sales team. Sales will also rank both so you have a full spectrum from the worst leads to avoid to the best leads to pass on. If you want to achieve sales-marketing harmony, then listen to what Sales says.

Lead scoring in automation can only help you on a single criterion at a time. How you *weight* those actions or criteria determines the *total* lead score at any given time. Marketo's Definitive Guide to Lead Scoring can help you further.

Please adjust these questions to your industry or organization's needs.

1. Which sales team are you on?
    a. Federal
    b. Americas - Regular
    c. Americas – Consulting
    d. EMEA
    e. Asia

2. Describe your ideal lead? [full text]

    [For a qualitative narrative that may capture additional thoughts]

3. Whom are you expected to call on? [industry, titles, departments?]

4. How likely would you be to call on [Airline] industry?
    a. Never
    b. Might Not Call
    c. Maybe Call
    d. Likely to call
    e. Call Immediately

*Most of your likelihood questions should be on a 1-5 scale similar to the above.

5. Based *only* on a person's title or function, how likely would you be to contact the following people by Title or Functional area?
   a. You may have to do this for each department or title group or for each industry. *Example:*
   b. Chief Executive Office
   c. CTO
   d. CIO
   e. Vice President
   f. Director
   g. Manager

6. Based only on a Financial Firm's Assets Under Management, how likely would you be to contact them?
   a. Under $100MM
   b. $100MM-$500MM
   c. $500MM - $1B
   d. $1B-10B
   e. $10B-$50B

Question 6	1 – Never	2 – Might Not Call	3 – Maybe Call	4 – Likely to Call	5 – Call Immediately
Under $100MM					
$100MM-$500MM					
$500MM - $1B					
$1B-10B					
$10B-$50B					

7. Based only on a person's title, how likely would you be to contact the following titles?

8. Based only a company's annual revenues, how likely would you be to contact them?

9. Based only on a person's functional department, how likely would you be to contact them?

I want to pause here and recommend that you include Firm Size, Titles, Industries, and Functions that you know are unlikely to be called on or even targeted. Your goal is to gather intelligence and build a *relative* ranking scale to inform the lead scoring. If you just score on the best criteria, then you will never be able to manage bad or not ready leads properly.

10. Taking each of the following actions on its own, how would you rate the action as an indication of a prospect's readiness for a sales call?
    a. Never ready
    b. Not ready
    c. Needs more activity
    d. Ready
    e. Very ready

    The kinds of behaviors will depend on your company's toolset, but here are the typical ones:
    - Attended webinar
    - Missed webinar
    - Attended company event
    - Missed company event
    - Registered for content
    - Requested Trial
    - Signed up for Newsletter
    - Unsubscribed from Newsletter
    - Signed up for Promo Emails
    - Bought small amount of product
    - Requested pricing
    - Requested call back
    - Mentioned switching from competitor
    - Responded to an email
    - Downloaded brochure
    - Downloaded white paper
    - Visited via Search Engine
    - Left card at Booth
    - Left card and requested information
    - Spoke with salesperson at show
    - Did not speak with a salesperson
    - Website visit
    - LinkedIn Visit
    - Twitter
    - Facebook Fan
    - Emailed Us
    - Referral
    - Responded to Ad

11. What kind of lead scoring system would be meaningful to you? In other words, what simple metric would help you prioritize a lead against a large group of leads?
    a. Number from 0-100 with threshold before sending to you.
    b. Letter Grade: A - F
    c. Letter Grade plus Score Number: A 100

      d. Letter Grade plus Rank - A1 is top , C3 is poor

      e. Score plus Urgency score: 0-100 + Call Now, Thinking, Not Ready