

Marketing Rockstar's Guide to Marketo

Chapter 1. How to Build a Lead Scoring System

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Overview

This guide assumes you are already convinced you should do lead scoring. Maybe you read the [Definitive Guide to Lead Scoring](#) among other papers and guides. Your big question now is “How do I make it happen?” If you are already using scoring, perhaps you are wondering “How can I make it more useful?” This section aims to answer those questions, providing practical tools to move you forward.



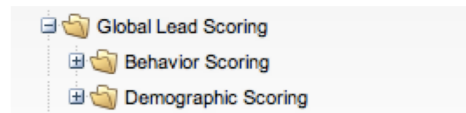
Best Practice: Use Scoring as part of a Lead Lifecycle System to gain its real benefits.

Lead scoring alone cannot achieve anything on its own. You must use this as part of a larger Lead Lifecycle System where you hold and nurture leads before passing them to Sales.

A Word on Naming and Organization

I recommend following the earlier suggestions on the folder structure, list names, and smart campaign names.

Folders should be clearly marked for the major kinds of scoring:



Score flows can have names like

Maneki-neko Interest Score – Batch

Product 2 – Employee Range – Trigger

Search Term Keywords Scoring – One Time

You should avoid names like

Search Phrase Scoring +20 (because you may change the score later)

Whitepaper 1 score

Creating the Scoring Model: Ask Sales

The Lead Scoring Survey is designed 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.

Sources of Data

There are several methods to use when developing a lead scoring system. Depending on the time you have and how you plan to use lead scoring, you will want to use one or all of these tools as you refine the system.

- Analyze the data from Won and Lost Opportunities to determine common traits of each.
- Analyze rejected lead data to determine negative scoring possibilities as well as missed opportunities.
- Buyer Personas: If you already have these established, use the positive criteria to build the scores.
- Sales Funnel Stages: if you have an established funnel, or at least TOFU (top of funnel) staging set up, the use that to score certain behaviors.
- The Smoke Filled Room: you, your Marketing VP, and the Sales VP have a meeting and use anecdotes to create a rough system. This might be good as a start before a Focus Group or Survey.
- Conduct a Focus Group of the nearest sales people you can grab. Salespeople tell stories to each other all the time, so they do have a good sense for what works. Ask them to differentiate between their ideal "Buy Now random request" and "Real Prospects who need to be sold."
- Survey Your Sales Team. They are on the front lines; they hear the stories of your customers. Find out what sales wants to hear from your customers.

Sales Focus Group Method

You are a marketer, so you know how to do a focus group, right? Just bring together your sales team for a session about what they want to know about leads and what things indicate a strong likelihood of a sale. During the meeting, resist the temptation to use your marketing knowledge. Just ask a few questions like

- What words do hot prospects use?
- What gets you excited to call someone back?
- How do you feel about leads from webinars?
- Who is buying these days?
- What kinds of people might buy, but are not ready?
- Whom do you definitely not want to speak to?

If you must, use this information to construct a relative ranking of demographic and behavioral criteria you can then plug into Marketo. Remember, you can always change it as you learn what works. The best way to use the focus group is as a basis for a larger survey where you can analyze real data from the entire sales team. This is especially helpful with multi-product or global sales teams.

Remember to include “Call Now” triggers such as free trials, Contact Us forms, or demo requests. Most marketers assign +15 or +20 points to these behaviors because the lead is “raising her hand.” Make sure you have an established process for handling direct requests and that you automate some of that process in Marketo.

Sales Team Survey Method

The Likelihood to Call Ranking

I believe this is the best way 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 criterion*.

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. [\[Download Now\]](#)

1. Which sales team are you on?
 - Federal
 - Americas - Regular
 - Americas – Consulting
 - EMEA
 - 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?
 - Never
 - Might Not Call
 - Maybe Call
 - Likely to call
 - 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?

You may have to do this for each department or title group or for each industry. Example:

- Chief Executive Officer

- CTO
- CIO
- Vice President
- Director
- Manager

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

This is how a question might look on paper or in [SurveyMonkey](#).

Question 6 (For each row, select one choice)	1 – Never	2 – Might Not Call	3 – Maybe Call	4 – Likely to Call	5 – Call
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?
 - Never ready
 - Not ready
 - Needs more activity
 - Ready
 - Very ready

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

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

13. 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.

14. 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?
 - Never ready
 - Not ready
 - Needs more activity

- Ready
- Very ready

You can [download](#) a copy of this survey to get started.

Translating Relative Ranks to Scores

Once Sales has completed the Survey, you should analyze the data using Excel to best determine the *relative rank* of each title or behavior before proceeding to Marketo. Also see my [earlier blog post](#).

Now you have your data from the survey and other methods. How do you take this data and prepare for programming Marketo?

Step 1: Analysis

For each title, function, company, and behavior, take the average or median ranks from the 1-5 scale. You may want to run a pivot table to see differences between Products, Solutions, or Sales Regions.

Step 2: Ranked Tables

Make two tables: one with Demographics and the other with Behaviors.

Step 3: Sort the demographics in order from most likely to call (5) to least likely to call (1). Do the same for Behaviors.

If you find there are large differences between Solution Sets, Products, or Sales teams you may have to make several scoring tables where you will later filter triggers by several fields.

If you see some weird data, look into it. I hesitate to say, "adjust" but you may have to do so. Remember, you asked for Sales' input, but that doesn't have to be the final say.

Step 4: Build a Lead Scoring Planning Tool

You can [download the tool](#) to help you get started. An example is on the next page.

You will have to adjust the planning tool to meet your needs, so this explanation should serve as a guide only.

Step 5: Fill in the Product Sections if desired.

Segment by product, solution, etc. In each group you will keep the specific sub-filters you will use. Note that in this example, each product has a different `Employee Count`, which is important to Sales.

Criteria: what are the basic filters involved?

Relative Rank: this is the score for that demographic or behavior you pulled in Step 2.

Points to Assign: place the number of points you will assign to each activity. I recommend keeping a single score between -20 and +20 points. For instance, a rank of 5 may get 20 points.

Number of Times: how many times will this lead be able to run through the campaign? Go to **Schedule > Qualification Rules** to see your options. Place a "1" for **Once** (default) and **Every X Days** or **Each Time** for others. scores should typically be scored **Once** while Behaviors may require multiple score applications.

Why is that? If you score Inactivity using **Not Filled Out Form In Past 30 Days**, then the lead can only qualify for this flow **Every 30 Days** in order for the negative scoring to properly work over time. If you did **Once**, that lead would lose points only *once for inactivity even if that lead remains inactive for another year*. It could be possible for that lead to pop up in strange places if negative scoring is not properly active.

Back Score: will you run a batch campaign to score existing leads? For Demographics you should always do so. Only a few behaviors should be back scored.

Type: Trigger or Batch campaign. When you first run scoring, you will have to run several Batch campaigns for demographics. For Behaviors, they will almost all be set to Triggers. Only a few scores should be Batch campaigns including Inactivity and Competitors.

Step 6: Fill in Behavioral Rankings which are common to all Leads

If you use a Call Now flag, that flag should receive the highest number of points to push them over to MQL. This is where you will have to follow the ranks, but also assign rational points.

Negative behaviors should be carefully treated because they may have low average Rank, but should receive negative points.

Competitors and Bad Leads should typically have their scores set to 0.

Lead Scoring Planning relative weights are on a 1 to 5 scale, 5 being more desirable and 1 being least desirable
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Step 1: Reset ALL Scores to =0

Use this template to help you list out each of the criteria, demographics, and behaviors you will build. You can use this after a Sales Survey or a focus group session.

Product 1	Criteria	From Survey:		Run Times	Back Score	Type
		Relative Rank	Points to Assign			
	Employee Count			1	Y	Trigger
	Employee Count			1	Y	Trigger
	Industry or Company			1	Y	Trigger
	Industry			1	Y	Trigger

Product 2	Criteria	Relative Rank	Points to Assign	Number of Times	Back Score	Type
	Employee Count			1	Y	Trigger
	Employee Count			1	Y	Trigger
	Revenue			1	Y	Trigger
	Revenue			1	Y	Trigger
	Functional Areas			1	Y	Trigger
	Functional Areas			1	Y	Trigger
	Functional Areas			1	Y	Trigger
	Functional Areas			1	Y	Trigger
	Functional Areas			1	Y	Trigger
	Seniority	CXO		1	Y	Trigger
	Seniority	Vice President		1	Y	Trigger
	Seniority	SVP		1	Y	Trigger
	Seniority	Director		1	Y	Trigger
	Seniority	Manager		1	Y	Trigger
	Seniority	Analyst		1	Y	Trigger
	Seniority	Specialist		1	Y	Trigger
	Seniority	Intern		1	Y	Trigger
	Seniority	Student		1	Y	Trigger
	Seniority	Professor		1	Y	Trigger
	Seniority	Consultant		1	Y	Trigger

Product 3	Criteria	Relative Rank	Points to Assign	Number of Times	Back Score	Type
	Functional Areas			1	Y	Trigger
	Functional Areas			1	Y	Trigger
	Functional Areas			1	Y	Trigger

Behavioral Rankings	Criteria	Relative Rank	Points to Assign	Number of Times	Back Score	Type
	Multiple Website Visits	3+		Every 7 Days	N	Trigger
	Career Page	Bad		Every 7 Days	N	Trigger
	Unsubscribe	Neutral		Each Time	N	Trigger
	Comment Box Keywords			Once	N	Trigger
	Whitepaper Download			Each Time	N	Trigger
	Case Study Page			Each Time	N	Trigger
	Demo Page			Each Time	N	Trigger
	Webinar			Each Time	N	Trigger
	Inactivity	Any non activity		Every 30 Days	N	Batch
	Personal Email Domain			Once	Y	Trigger
	Competitors	set to 0		Each Time	Y	Batch
	Contact Us Form Fill out			Once a Day	N	Trigger
	Email Bounces Hard	hard bounce x 2		Once	Y	Trigger
	Google Search Term	keywords		Once	Y	Trigger

Building a Scoring System in Marketo

Now comes the fun part! We can use Marketo to build the necessary logic to automatically handle millions of leads you bring in every week.

Scoring System Models

There are three scoring models you can use to run Scoring campaigns

Independent Smart Campaigns

This model uses individual demographic or behavioral scores. You will use these in the next two models as well, however, these are individual and independent campaigns running on Triggers or periodically as Batches.

Value Change → Score Change – this changes the score when and if the lead meets the criteria in a batch or trigger.



Best Practice: use one of the first two models for faster setup and clearer options.

Data Value Changes

Attribute: Original Search Phrase

New Value: contains (12)

Add Constraint



1 - Change Score

Score Name: Lead Score

Change: +3

Add Choice

Note: Data of this activity type is archived after 90 Days

Requested Scoring Program

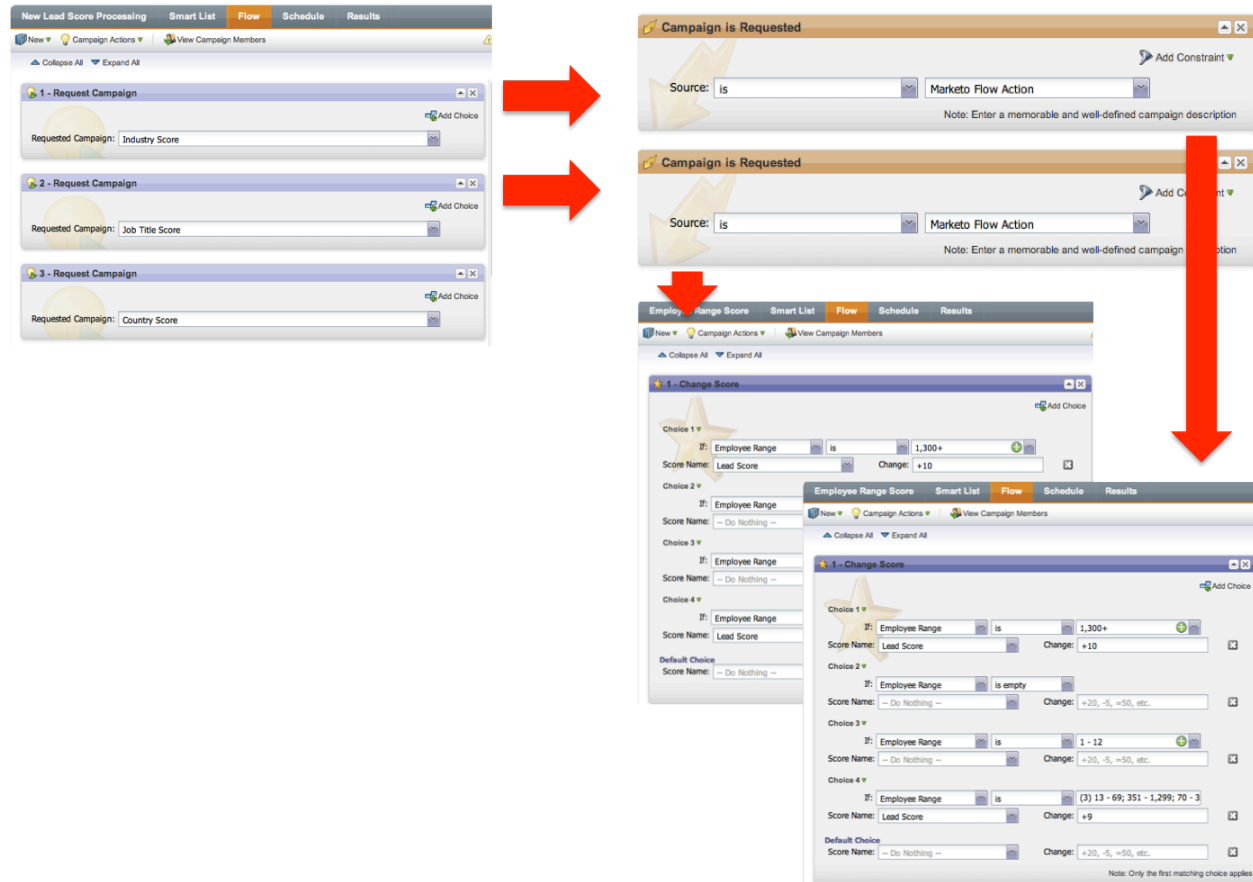
For New Leads: New Lead Flow → Request Scoring Campaign → Values → Request Score → Score Change

This model is for systems where you have a single campaign that runs when Lead is created. This flow Requests Campaigns such as Data Managers, Lead Flow, and Lead Scoring. The requested campaigns will then call the child

campaigns to run only when requested. You may still need behavioral triggers running separately as single step models.

For existing Leads: Value changes → Request Scoring Campaign → Score Change

This similar model listens for any trigger change on the fields desired, then calls the appropriate score flow campaign. I do not recommend this because of the extra step involved.



Program Scoring

This is where you create a custom Channel called Scoring. You then create a Program called "Lead Scoring Program" which contains child Smart Campaigns for Behaviors and Demographics. Your Progression Statuses should be carefully chosen to align to the buying stages from Unknown to Won. You could also use a status range limited from Known to SAL.

[Marketo and some people recommend](#) a simple Program Channel called "Scoring" with one Member Status, such as "Member". You could also use such a program to manage your MQL process with Statuses such as

Member
Inactive
MQL
Recycled

If you decide to use a Program to both score leads and manage the lead flow, then do not use a separate lead management campaigns series. Do it all from the Program so you can match the Progression Status to Lead Status/Stage in your CRM and in Revenue Cycle Analytics.

Since Scoring should be a global system, I [recommend using the folder options and smart campaigns instead](#). The time involved to manage a Program, especially if you will need to rescore at some point is not worth the effort. If you want to manage your Lead Lifecycle, I suggest you do so separately from the Scoring System itself.

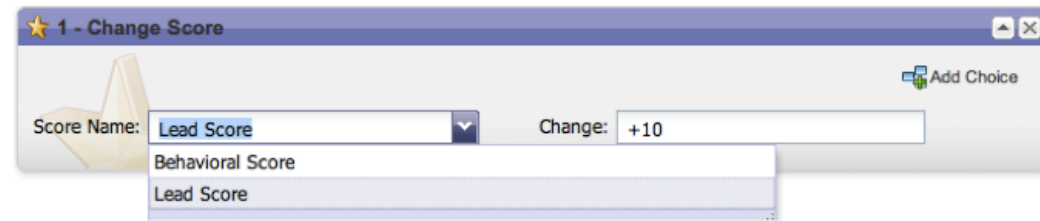
For this chapter, I will only discuss the Independent Smart Campaign system. It is clearer and forms the basis for the other two models.

Multiple Scoring Fields

Marketo supports multiple scoring fields that you can use in a variety of ways. Out of the box, Marketo has:

- Lead Score
- Behavioral Score
- Demographic Score

Most firms can use any or all of these easily and without any issues. If you are starting out with scoring, I recommend only using the Lead Score field, which is the default whenever you pull in the flow action Change Score.



Score Threshold Model

You can scale your scoring system to be absolute or relative.

In the **Absolute** model, which I use, you score all the leads using the system we created above. Then based on the distribution of leads in the initial system, you set a threshold MQL level. The caveat here is a Lead's score can continue increasing, especially if they are active on your site and you have a +1 for each page visit. Negative scores for inactivity, poor data, etc. counter this situation.

In the **Relative** model, you scale the score to 100 for simplicity. Any lead that makes it to 100 is set to MQL and sent to Sales. Then you have to carefully scale each scoring item so it is weighted against 100%. Many people assign a 30% weight to Demographic and 70% to Behavioral, and then adjust individual item scores appropriately.

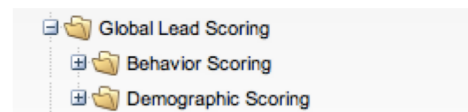
Ensure that people who request a Call Now receive a higher score and at least are viewed by someone in Marketing or you risk ignoring people because of their score.

Smart List Creation

Scoring will use quite a few smart lists as a base. While you can use a Program to collect all of these together, it is not recommended.

Go to Lead Database and create three folders:

- Lead Scoring Smart Lists
- Demographics
- Behaviors



A note on Buyer Personas: if you have these, you may want to create smart lists for each one. Only those leads with enough data will qualify for your lists and that is ok. You can then setup a SFDC field called Buyer Persona. Once it syncs to Marketo, use this field in a Data Management workflow to populate a List and a Field anytime someone meets the criteria. You can then use that Persona field to score on if desired. Be careful not to double count scores with Title, Function, etc.

Which Lists Do You Need?

Go back to your Lead Scoring Planner to determine which lists you need to build. Which lists you need are up to you. Some common scoring lists will include **Titles**, **Bad Titles**, **Personal Email Domains**, and **Product Interest**. Remember, you can also use a well-designed smart list for other purposes, such as sorting leads or handling Lead Flow.

You may need several lists, or use your Standing Lists, as part of this process. The lists you create may function as part of a single Scoring Flow using a series of Choice Steps, or they may be part of a single Scoring Campaign.

Here are some examples:

Comment Box Keyword Scoring

This list is to capture leads that have high value keywords about our solution. You could also clone this and make a **Bad Comment Box Scoring List** with keywords you do not want to see.

The screenshot displays the Marketo Smart List configuration interface. At the top, there are tabs for 'Comment Box Keywords', 'Leads', and 'Smart List'. Below the tabs, there are options for 'New', 'List Actions', and 'Use Advanced filters'. A filter count shows '1 and (2 or 3 or 4 or 5 or 6 or 7 or 8)'. There are also 'Collapse All' and 'Expand All' buttons. The main area contains six filter rules, each with a title and a configuration field:

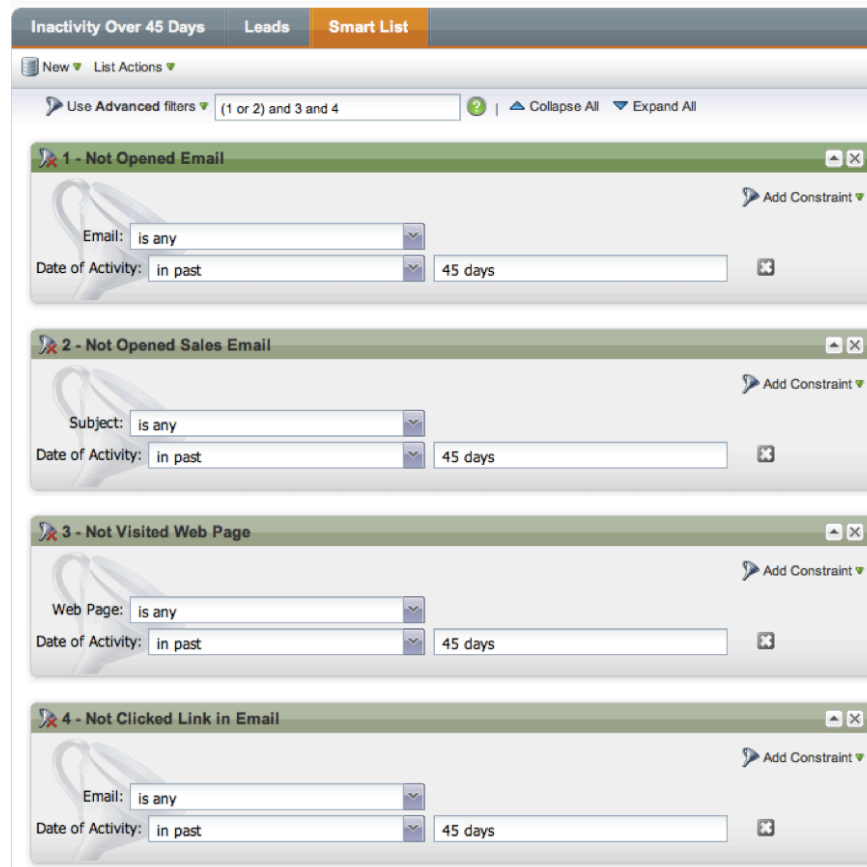
- 1 - SFDC Type**: SFDC Type: is Lead
- 2 - Comments**: Comments: contains [text box]
- 3 - Comments**: Comments: contains [text box] r Management
- 4 - Comments**: Comments: contains [text box] Recruitment
- 5 - Comments**: Comments: contains [text box] Compensation
- 6 - Comments**: Comments: contains [text box]

Title Scoring List

Title scoring should encompass several lists, of good and bad titles, depending on your needs. You might have a list for Students, CXOs, and Buyers.

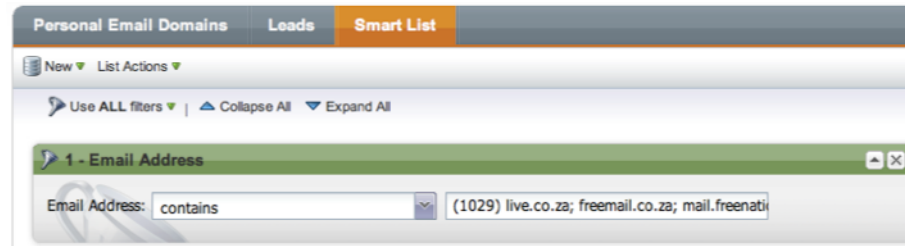
Inactivity Over 45 Days

Inactivity can be measured in several ways. In this example, I chose to bring in Leads who did not open any type of email in the past 45 days and who did not visit a web page and did not click in an email. Whom you want to include could be different.



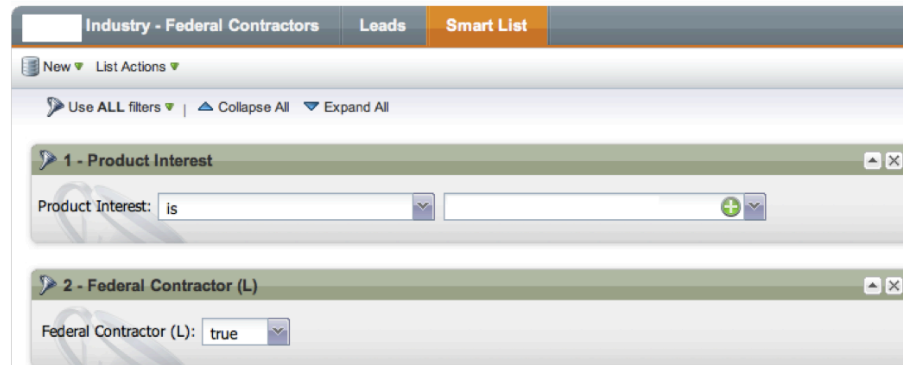
Personal Email Domains

You will likely want to demote Leads who registered with a personal address. Please demote them, nurture them, and encourage them. I see too many firms just trashing these even with Marketo tools at their disposal. You can [download a domain list from my site](#).



Product Interest for Scoring

Some firms have multiple products or solution areas with different processes and buyer personas. You may want to setup special scores for specific groups like this.



Status	Used By
Summary	
Type:	Smart List
Created:	Aug 10, 2012 12:31 pm EDT
Last Modified:	Aug 13, 2012 05:52 pm EDT
Smart List (4)	
Advanced filters:	1 and (2 or 3) and 4
Filter 1 - Product Interest:	Product Interest is in 'ement', 'Recruiting'.
Filter 2 - Job Title:	Job Title is in 'Chief Executive Officer', 'Chief Talent Officer', 'Chief of Human Resources', 'Ch...
Filter 3 - Job Title:	Job Title contains 'Chief'
Filter 4 - Job Title:	Job Title not contains in 'Dep.', 'Deputy', 'Consult', 'Consulting', 'Principal'.

Revenue Scoring Lists

You can also bring in data on firm size and even combine it with other fields to focus on the different buyer types for each solution area you sell.

Status	Used By
Summary	
Type:	Smart List
Created:	Aug 10, 2012 01:57 pm EDT by
Last Modified:	Aug 13, 2012 05:29 pm EDT
Smart List (2)	
ALL filters apply:	(1 and 2 and 3 ...)
Filter 1 - Product Interest:	Product Interest is '1
Filter 2 - Annual Revenue:	Annual Revenue less than '2000000'

Additional lists could include Employee Size, User base, Partners, Other Products Used, OEM Use, etc.

Creating Workflows

Batch vs. Trigger: what works for your business or your databases?

There is no consensus on which type of campaign is best for lead scoring. Batch campaigns can be used in all cases; however, Triggers work best for scores based on field data. For instance, it is much harder to setup a Trigger campaign to handle lead inactivity because a Trigger must be based on an Action or Change, but Smart Lists do not create either. Getting around that with an Add to List/Remove from List action is cumbersome. Here is a quick list of what seems to work best:

Type of Scoring	Batch	Trigger
Field Value (e.g.: title, email domain)	✓	✓
Time Based (egg: in past X days)	✓	✗
Action Behavior (just happened)	✗	✓
Back Scoring or Model Change	✓	✗

Batch Scoring

Use a batch scoring campaign to handle scores based on Time, Fields, or Back Scores. It is best to use batches for Time or Back Scoring. For instance, when you first setup the Lead Scoring System, you will need a series of back scoring campaigns to run against fields like Title, Company, or Industry.

Batch Demographic Back Score: Employee Range

Whenever the field Employee Range changes, you can score the lead depending on the range it falls into.

The screenshot shows the 'Employee Range Score' configuration in Marketo. The interface includes tabs for 'Employee Range Score', 'Smart List', 'Flow', 'Schedule', and 'Results'. Below the tabs are options for 'New', 'Campaign Actions', and 'View Campaign Members'. The main configuration area is titled '1 - Change Score' and contains four choice rules:

- Choice 1:** If: Employee Range is 1,300+; Score Name: Lead Score; Change: +10.
- Choice 2:** If: Employee Range is empty; Score Name: -- Do Nothing --; Change: +20, -5, =50, etc.
- Choice 3:** If: Employee Range is 1 - 12; Score Name: -- Do Nothing --; Change: +20, -5, =50, etc.
- Choice 4:** If: Employee Range is (3) 13 - 69; 351 - 1,299; 70 - 3; Score Name: Lead Score; Change: +9.

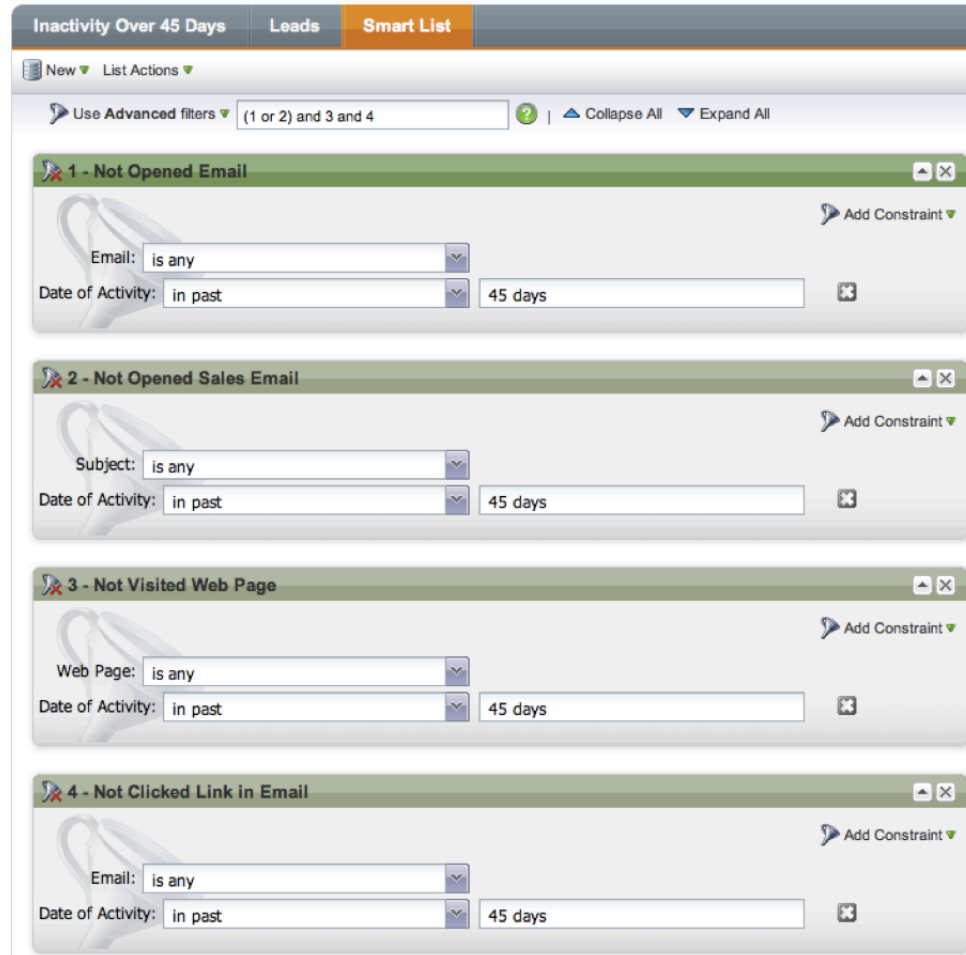
A 'Default Choice' section is also present with a 'Score Name' of '-- Do Nothing --' and a 'Change' of '+20, -5, =50, etc.'. A note at the bottom states: 'Note: Only the first matching choice applies'.

Batch Behavior Run Every 45 Days: Inactive

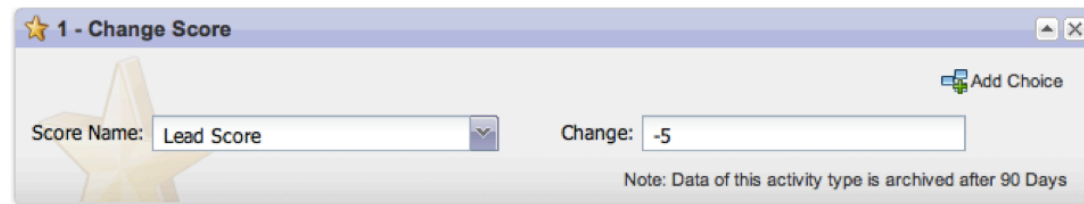
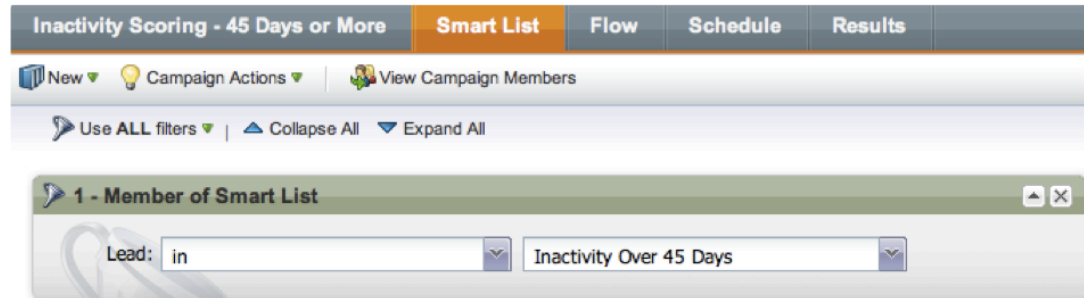
Step 1: Inactive Smart List

Create a Smart List that brings in Leads who have various inactivity behaviors. You can choose whichever filters you want for your business. I recommend

Not Was Opened Email
Not Filled Out Form
Not Clicked Link in Email
Not Visited Web Page
All in past X Days



The leads that qualify will vary over time, which is good, because we only want to lower scores for leads who were inactive in the previous 45 days. Ideally, some leads will reactivate thanks to your great nurturing campaigns!



Batch Campaign Schedule

Campaign Status: Last run: Sep 05, 2012 11:00 pm EDT

Smart List Mode: Batch

Qualification Rules: Each lead can run through flow once every 45 day(s)

Smart List Status: Set to affect around existing leads. (may change over time)
Around leads are blocked from mailings

Recurrence: Repeats every day
Next three runs:
Sep 06, 2012 11:00 pm EDT ✗
Sep 07, 2012 11:00 pm EDT ✗
Sep 08, 2012 11:00 pm EDT ✗

Each lead can run only every 45 days

A new group will qualify each day

Step 2: Inactive Batch Campaign

Using the Smart List to drive this campaign, you can set up the scoring quickly:

Inactivity Scoring - 45 Days or More | **Smart List** | Flow | Schedule | Results

New | Campaign Actions | View Campaign Members

Use ALL filters | Collapse All | Expand All

1 - Member of Smart List

Lead: in | Inactivity Over 45 Days

1 - Change Score

Score Name: Lead Score | Change: -5

Note: Data of this activity type is archived after 90 Days

Batch Campaign Schedule

Campaign Status: Last run: Sep 05, 2012 11:00 pm EDT

Smart List Mode: Batch

Qualification Rules: Each lead can run through flow once every 45 day(s)

Smart List Status: Set to affect around existing leads. (may change over time)
Around leads are blocked from mailings

Recurrence: Repeats every day
Next three runs:
Sep 06, 2012 11:00 pm EDT ×
Sep 07, 2012 11:00 pm EDT ×
Sep 08, 2012 11:00 pm EDT ×

Each lead can run only every 45 days

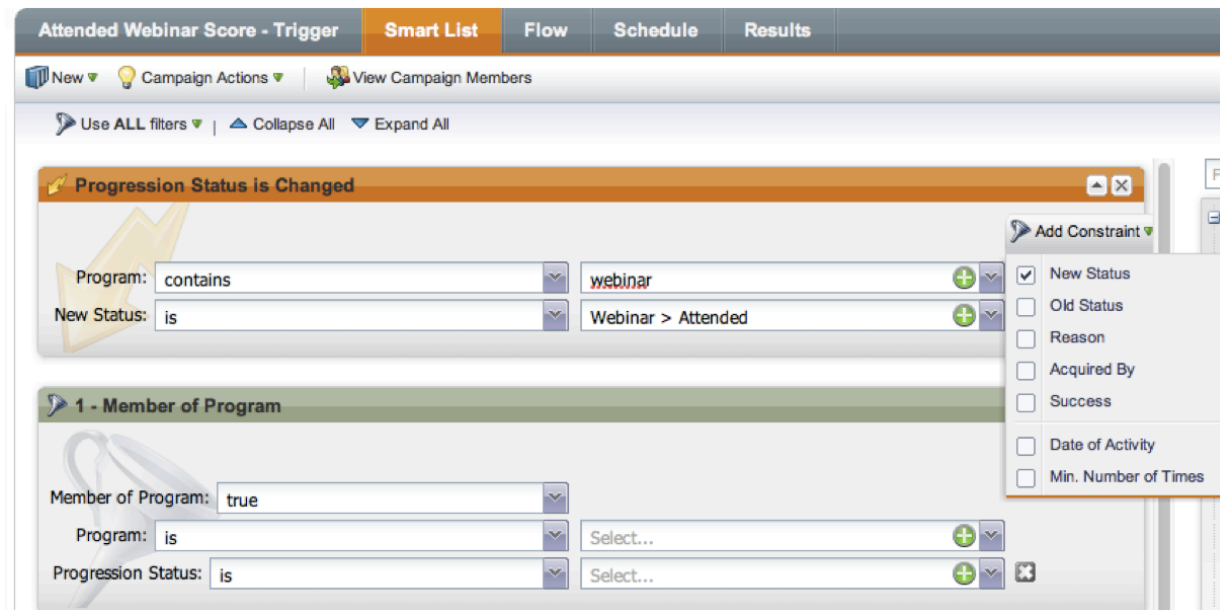
A new group will qualify each day

Triggered Scoring

Use triggered scoring flows to handle New Leads, Changes in Fields, or Behaviors. For instance, if the Title changes to CEO, then rescore the Lead.

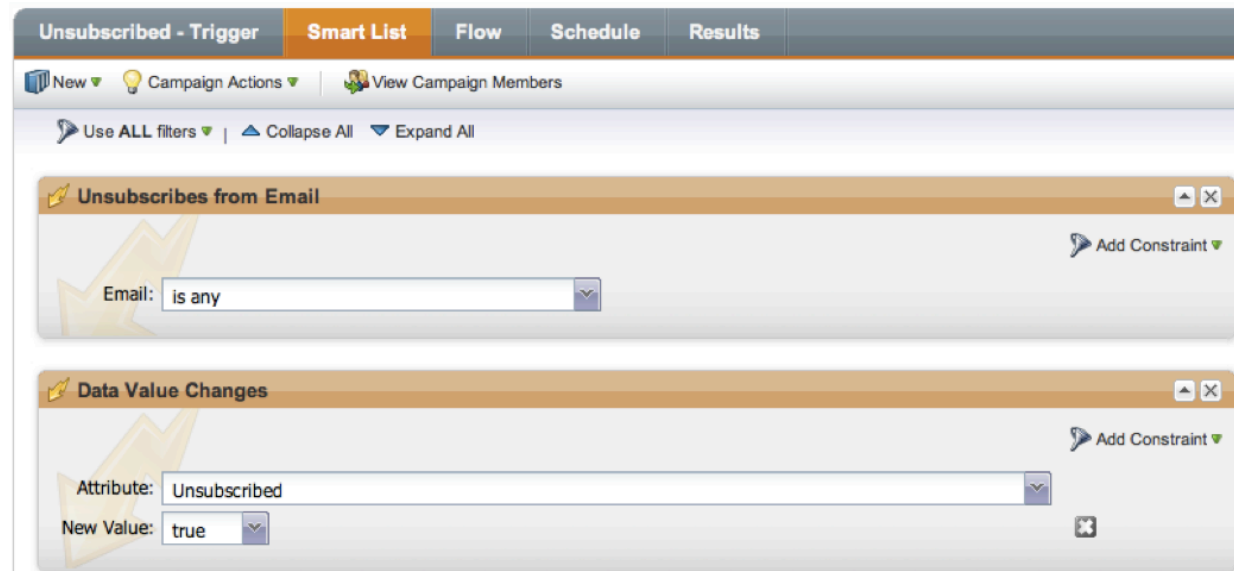
Triggered Webinar Attendance

If Member of Program is True and IS ANY and new Progression IS Webinar>Attended, then score.



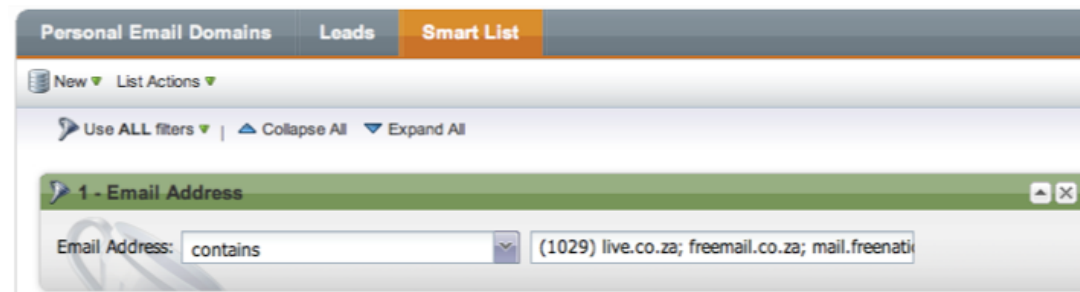
Triggered Unsubscribe

Unsubscribing is a negative behavior. Usually I score a total Unsubscribe (Email Opt Out) only. You can, of course, score individual channels such as Newsletter, Webinar Invitation, or Event Invitation each with individual scores. It's up to you.



Triggered Demographic: Email Changes is NOT personal

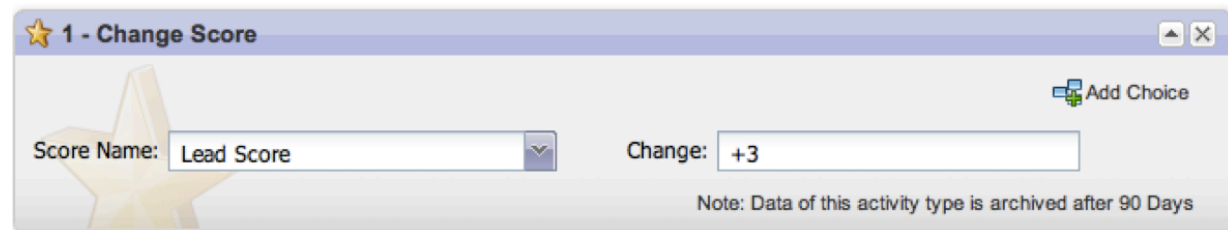
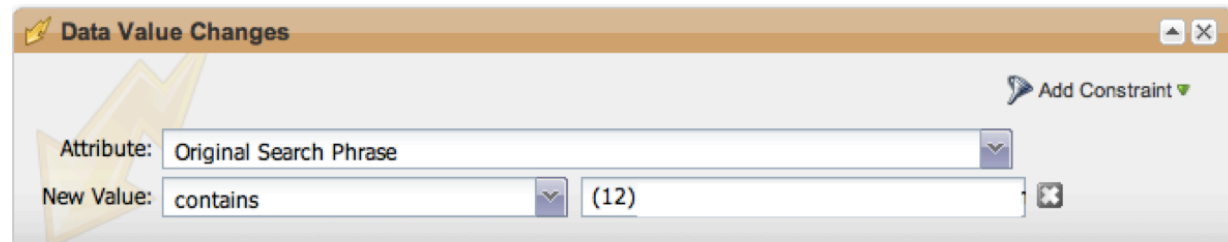
Many firms and sales people see use of a personal email address as a negative behavior. While you can lower a score for using “@gmail.com” you may also want to increase it when the lead *does not* use a personal email. A trigger flow which watches for both Personal Email and Not Personal Email can take care of this.



Remember to set the Schedule to Qualify Every Time.

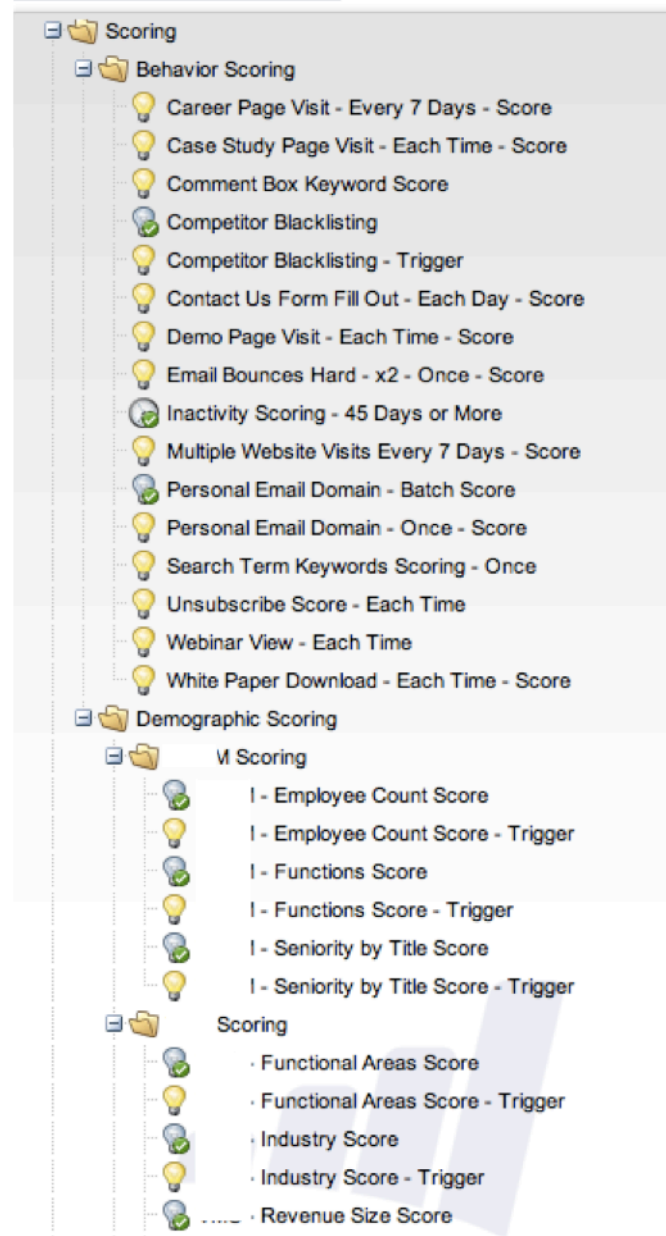
Triggered Behavior: Original Search Phrase

You can also set triggers based on keywords in text fields including the powerful data from search engines. I always add points to someone who used my Company Name, Competitors, or related solution keywords.



Example Systems

When you are done, you will have a similar tree in your Marketing Activities area. Remember to have a Lead Management campaign for moving MQLs to Sales (or a special queue).

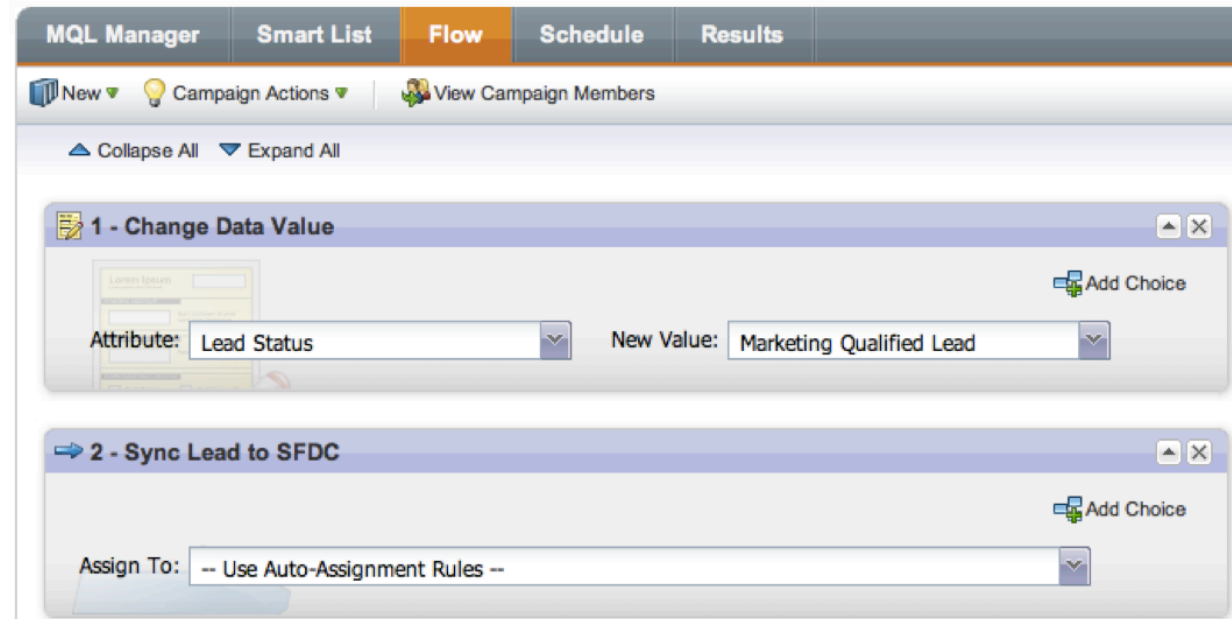


Step 1: Smart List: Score is Changed Score AT LEAST X

The screenshot shows the Marketo MQL Manager interface for configuring a Smart List. The top navigation bar includes 'MQL Manager', 'Smart List' (highlighted), 'Flow', 'Schedule', and 'Results'. Below the navigation bar, there are buttons for 'New', 'Campaign Actions', and 'View Campaign Members'. A toolbar contains 'Use ANY filters', 'Collapse All', and 'Expand All'. The main configuration area consists of three stacked filter panels:

- Score is Changed:** This panel has a title bar with a yellow arrow icon and a close button. It includes an 'Add Constraint' button. The configuration is as follows:
 - Score Name: is
 - Lead Score
 - New Score: at least
 - 70
- 1 - Member of Smart List:** This panel has a title bar with a green arrow icon and a close button. The configuration is:
 - Lead: not in
 - Competitors
- 2 - Member of Smart List:** This panel has a title bar with a green arrow icon and a close button. The configuration is:
 - Lead: in
 - Suppression List

Step 2: Flow: Lead Status = Marketing Qualified Lead



Handling Competitors

I recommend handling Competitor data up front as they are created. The entire flow should be a part of your Lead Scoring System even though it will handle a number of functions. Keep your Competitor Leads in your database so you can track their activity as they peruse your site or try to download things. If you carefully watch their Web Activity, you may be able to spot potential feature launches and client attacks before they happen.

The flow below is what I recommend when a Competitor lead enters the database. Remember, this is based on your **Competitor Smart List**, which we built in a different chapter. Not all competitors are foolish enough to use their real email addresses (although many do), so the Competitor Smart List will help you snag those who fail to cover their tracks.

A triggered competitor system:

The screenshot shows the Marketo interface for a campaign named "Competitor Blacklisting - Trigger". The interface is divided into several sections:

- Navigation Bar:** Includes tabs for "Competitor Blacklisting - Trigger", "Smart List", "Flow", "Schedule", and "Results". Below the tabs are links for "New", "Campaign Actions", and "View Campaign Members".
- Section 1: Smart List - "Who"**: "Define which leads this campaign will affect".
- Section 2: Flow - "What"**: "Define campaign actions and steps".
- Section 3: Schedule - "When"**: "Manage when the campaign is active".
- Section 4: Results - "Wow!"**: "Track campaign progress".
- Summary Table:**

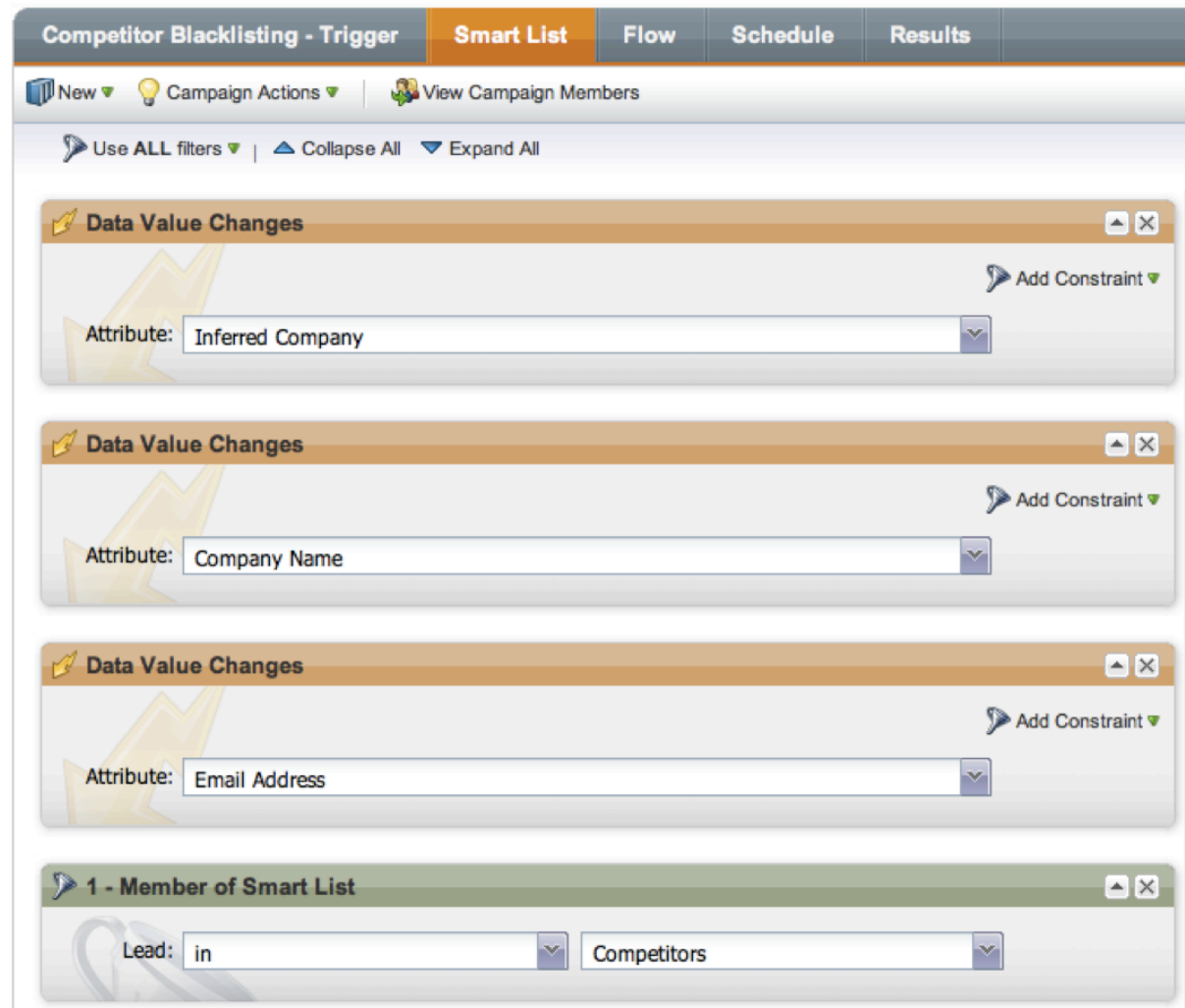
Status:	Triggerred (Active)
Qualification Rules:	Each lead can run through the flow once
Created:	Aug 13, 2012 06:19 pm EDT
Last Modified:	Aug 15, 2012 12:28 pm EDT
Members:	18
- Smart List (4) Table:**

ALL filters apply	(1 and 2 and 3 ...)
Trigger - Data Value Changes	Attribute is 'Inferred Company'
Trigger - Data Value Changes	Attribute is 'Company Name'
Trigger - Data Value Changes	Attribute is 'Email Address'
Filter 1 - Member of Smart List	Member of Smart List is 'Competitors'
- Flow (2) Table:**

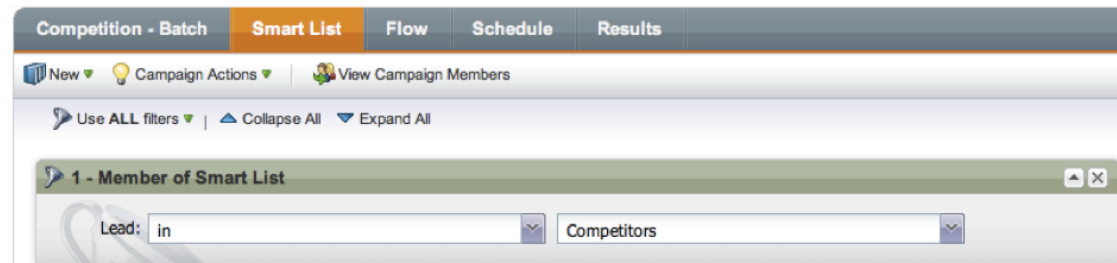
Step 1 - Change Score	Score Name: 'Lead Score' Change: '=0'
Step 2 - Change Data Value	Attribute: 'Black Listed' New Value: true
- Trigger Activation History (1) Table:**

Aug 15, 2012 12:28 pm EDT	activated
---------------------------	-----------
- Buttons:** "Refresh" and "Export" are located at the bottom right of the main content area.

Note how the triggers will catch any lead that may suddenly reveal they to be a Competitor.



A Batch competitor list system is a good choice for an MQL system where leads are held until they reach a threshold. Then you can reduce the score as well as place the leads out of your main system.



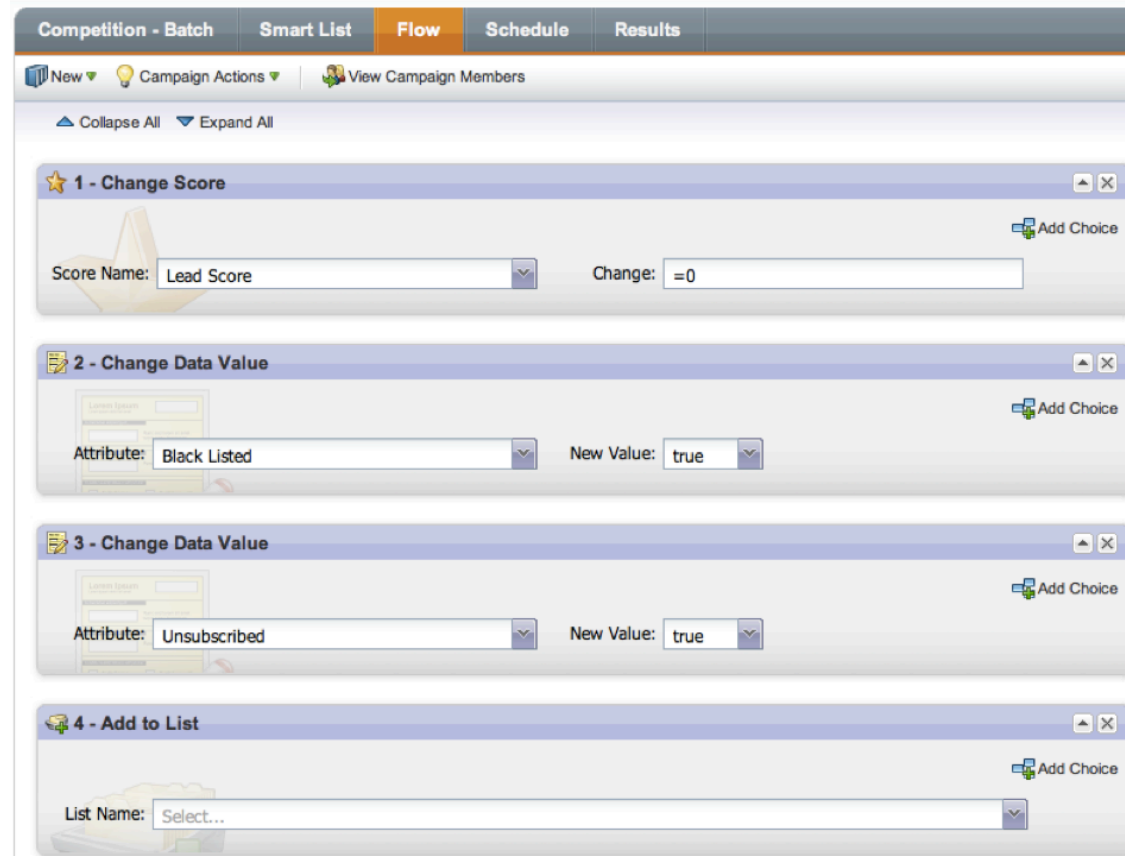
Competition - Batch **Smart List** Flow Schedule Results

New Campaign Actions View Campaign Members

Use ALL filters Collapse All Expand All

1 - Member of Smart List

Lead: in Competitors



Competition - Batch Smart List **Flow** Schedule Results

New Campaign Actions View Campaign Members

Collapse All Expand All

1 - Change Score

Score Name: Lead Score Change: =0

2 - Change Data Value

Attribute: Black Listed New Value: true

3 - Change Data Value

Attribute: Unsubscribed New Value: true

4 - Add to List

List Name: Select...

Triggers for Scoring Behaviors

Here are possible Trigger smart lists to help you design your own system. Remember to use these as a guide.

Attended Webinar or Event

You can use Progression Status as a trigger or batch filter for any positive or negative behavior scoring. In this case, automatically score people whose Progression Status Changes to Attended on any webinar.

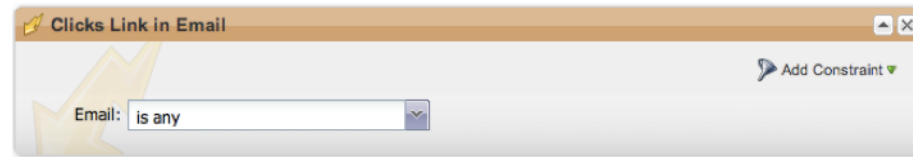
The screenshot shows the Marketo Smart List configuration interface for a trigger named "Attended Webinar Score - Trigger". The interface includes tabs for "Smart List", "Flow", "Schedule", and "Results". Below the tabs, there are options for "New", "Campaign Actions", and "View Campaign Members". A "Use ALL filters" section is visible with "Collapse All" and "Expand All" buttons. The main configuration area is divided into two sections: "Progression Status is Changed" and "1 - Member of Program". The "Progression Status is Changed" section has two filter rows: "Program: contains webinar" and "New Status: is Webinar > Attended". The "1 - Member of Program" section has three filter rows: "Member of Program: true", "Program: is Select...", and "Progression Status: is Select...". A "Add Constraint" dropdown menu is open on the right, showing options: "New Status" (checked), "Old Status", "Reason", "Acquired By", "Success", "Date of Activity", and "Min. Number of Times".

Fills Out Form

You can use this for any form or specific forms such as Contact Us or Free Trial.

The screenshot shows the Marketo Smart List configuration interface for a trigger named "Fills Out Form". The interface includes a "Add Constraint" dropdown menu. The main configuration area has two filter rows: "Form Name: is website Contact Us" and "Web Page: is www".

Clicked Link in Email



Downloaded an Asset

You can score any asset document, such as a whitepaper, case study, or file using a similar set of criteria. Remember you can do this for files inside Marketo's Images and Files or on your own website, as long as you set the right criteria.

Downloads Any PDF

1. Smart List - "Who"
Define which leads this campaign will affect

2. Flow - "What"
Define campaign actions and steps

3. Schedule - "When"
Manage when the campaign is active

4. Results - "Wow!"
Track campaign progress

Status Used By Membership Trend Members by Week Email

Summary

Status:	Triggered (Active)
Qualification Rules:	Each lead can run through the flow every time
Created	Apr 22, 2010 10:53 am PDT
Last Modified	Feb 18, 2011 05:24 pm PDT
Members:	5934

Smart List (2)

ANY filters apply	(1 or 2 or 3 ...)
Trigger - Clicks Link	Link Name contains '.pdf'
Trigger - Clicks Link in Email	Email contains '.pdf'

Flow (1)

Step 1 - Change Score	Score Name: 'Lead Score' Change: '+5'
-----------------------	--

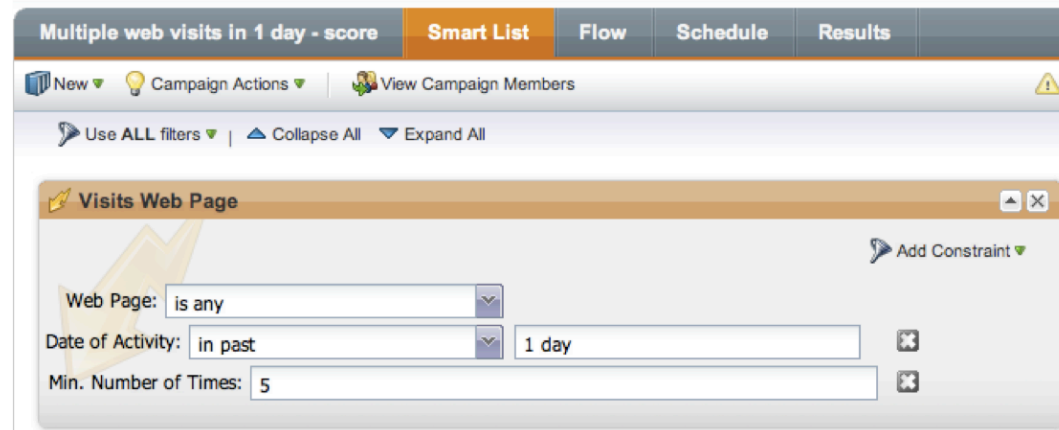
Trigger Activation History (1)

May 19, 2010 08:26 am PDT	activated
---------------------------	-----------

Refresh Export

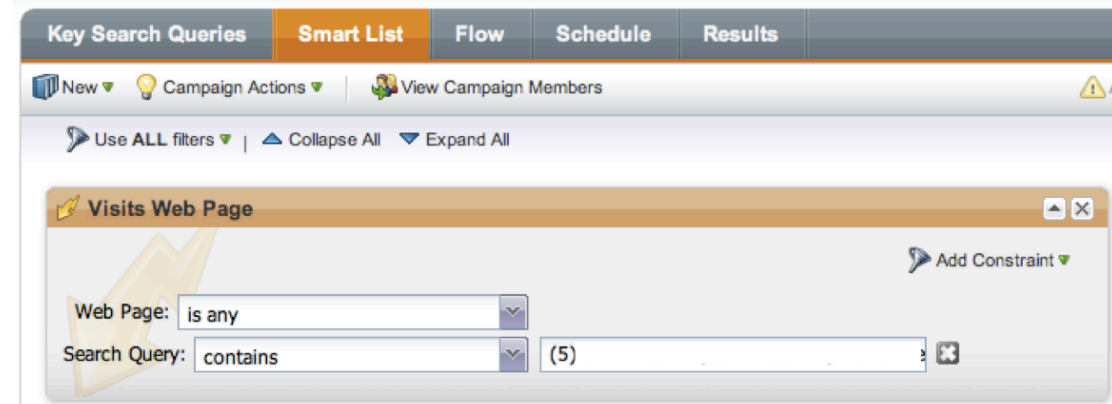
Website Visit

This can be a single page, a specific series of pages, or multiple pages over a certain time frame.



Referrer Source

Such as LinkedIn, PPC, Twitter, etc. Use the Referrer fields coupled with filters or smart lists.



There are a huge number of potential lists and triggers to use. Here are some ideas:

- Attended company event

- Missed company event
- Signed up for Promo Emails
- Bought small amount of product
- Mentioned switching from competitor
- Responded to an email
- Left card at booth

Best Practices

MQL Threshold Tracking

Please log changes to the MQL threshold to ensure the lead flow reporting is managed properly.

Date of Change	Previous MQL Score	New Score	Other Criteria	What/Why Change?	How many leads qualified now?
10/1/12	70	75	No junk, New,	Too many early leads, score inflation	57

Update Process

Updating flows for new papers, collateral, etc.

Remember to update scoring flows if they rely on certain website pages, collateral, or white papers. I recommend reviewing these once a quarter if possible.

Removing old collateral score flows or outdated scores

Is that old white paper from 2007 still on your site? Is it still being scored? Maybe it's time to put old Bessie out to pasture.

Existing scoring systems may have accumulated asset specific scores based on custom Forms or specific events. Invariably you will forget what that did and why. A new employee will be afraid to turn it off despite its clear uselessness. Please go back to disable such workflows after the time has passed.

Over-weighting CXO and Large Firms (via Marketo and Sirius Decisions)

Marketo's Definitive Guide to Lead Scoring mentions data from Sirius Decisions questioning the instinct to score C-suite leads and large firms higher than others leads. As I recently asked a client, "*Do you really sell to the CEO?*" Ask your sales people that. I bet even if the CXO does call, they place the actual work with a subordinate very quickly.

When looking at Title and Function scoring, know who makes the decision for your solution and who is championing your cause. If you can use Buyer Personas to help determine this difference, then you can score more effectively. You may even want to consider a Buyer Persona field and data workflow to handle it.

Lead Score and Merging Leads and Contacts

Merging leads in Salesforce or in Marketo will sum the scores of the records. So if you have 4 leads each with a Score of 10, the *merged* record will have a Score of 40.

There is no alternative to this action for manually merged records. If you use a tool such as Demand Tools, you can specify the winning score. I recommend taking either the *most recently active* Lead's score or *the highest scoring* Lead's score as the winner.

Resetting or Batch Changing Scores

Occasionally you may want to entirely reset your scores in favor of a new model, or to rescale scores to a new threshold.

Train Sales to Use Scoring

Now that you setup a scoring system, you should go back to Sales (team by team if appropriate) to discuss the model and how it helps them do their job better. Remind Sales that Scoring is based on their input and designed to help them prioritize their lead queue as well as send them only the highest (best) leads. If this is your firm's first time scoring leads, then be sure to ask them for continuous feedback using the Recycle Lead Status or other "rejection" loop. You will constantly tweak the MQL threshold and even scores as you learn more from their real experiences.

I recommend using a [Sales Guide to Lead Scoring](#) as a reference for Sales, and especially new salespeople. Please [download your copy](#) to modify and follow along here.

Example Sales Guide to Lead Scoring

When you have launched the scoring system, you should have a meeting or two with each sales team to review the scores and the process for handing off leads. A short guide like this will help sales people understand why and how you are doing things. Clearly your process will differ from my experience, so edit this as needed.

Updated: XXXX 2011

Starting in XXXX 2011, Marketing started to score incoming leads, as well as existing leads, on various criteria. This Lead Score is designed to provide an indication of both a Lead's engagement with Company as well as their closeness to our ideal target

The scores are based on the Global Sales Survey where you ranked your likelihood to call someone based on several dozen criteria. We combined this data with knowledge of our clients to form a scoring model.

The Lead Score and other helpful details are provided on the Lead record. Highlighted are areas that can help you when understanding what a lead might like to discuss with you.

It is important to note that the Lead Score is a sum of all Demographic and Behavioral scores. Please check Activity History and Campaign History to understand how the lead is engaging with us.

Marketing finds high scoring leads and passes them from our Nurturing Queue to regional queues for further evaluation. Your regional marketing manager will then pass a Marketing Qualified, high scoring lead to the appropriate territory manager based on their location, company, and requests.

Current Qualification Rule

A lead can only be transferred to Sales when it meets all three conditions.

- Score greater than XX (this may change depending on how many leads you need)
- Has opened or clicked any email (this helps ensure we send engaged leads)
- Not a "junk lead" which includes students, bad names, etc.

What does this mean for you?

This means you can receive a lead that first came to us two years ago, *if* they are actively engaged with us. It also means you could receive a lead who came in today who had a great title and company.

Scoring is not 100% perfect, so we are constantly reviewing the model and a human (optional) always checks Marketing Qualified Leads (MQL) before passing them to Sales.

When you receive a Lead in Salesforce, check the **Lead Status** and **Lead Score**. You can also find out more about the Lead's engagement with us using the **Activity History** and **Campaign History**.

Lead

Customize Page | Printable View |

< Back to List: Leads

Open Activities (0) | Activity History (10+) | HTML Email Status (1) | Campaign History (6) | Notes & Attachments (0) | Lead History (10+)

Lead Detail

Edit Delete Convert Clone Sharing Find Duplicates

Lead Owner	Queue [Change]	Lead Status	Marketing Qualified
Greeting		Lead Status Detail	
Name		Ranking	High
Suffix		Call Flow	<input type="checkbox"/>
Company		Lead Score	44
Industry		Lead Age	
Title			
Department			
Job Function			

Lead Statuses: Recycling and Trash

It is important that you **Recycle** or **Trash** leads to help Marketing refine the scoring criteria.

When Marketing or a Salesperson determines someone is not **Qualified** for any reason, we change the **Lead Status**. Each reason code causes a Lead to lose points so that they are not reviewed again unless they become actively engaged again.

Marketing programs will work with **Recycled** leads to determine when they may be ready for a sales person at a future time. **Trash** or “junk” leads will be removed from the database as appropriate. We make every effort to identify junk leads before they reach you, but some leads may get through.

Current Lead Scores

These tables describe the current Scores given for each behavior or demographic item given to us by a Lead. When possible, we augment their data using external systems.

Demographic Scores

What	Why/When	Score Change	How Often?
Country Score <small>*you could also link directly to the Campaign</small>	Target country (no score if not serviceable country)	+5	Once or on change
Employee Range	1-10 11-50 51-500 Over 500	+2 +3 +5 +8	Once or on change.
Industry	Government Mining Investment Banks State Government Software	+5 +8 +1- -2 +5	Once or on change.
Job Title	CXO Strategic Planner Economist Accountant Sales Operations Marketing	+8 +12 +12 +9 -5	Once or on change.
Using Salesforce	Yes No Don't Know	+10 -2 +1	Once or on change.
Company Name	Global 2000 List Target Account List Major NGO University Federal Government Local Government Trade/Development Agencies	+20 +20 +15 +10 +15 +2 +5	Once or on change.
Personal Email Domain	@gmail.com, etc.	-5	Once or on change

Behavioral Scores

What	Why/When	Score Change	How Often?
Ask a Question	They asked a webinar question	+10	Every Time
Contact Us Form	Requested help/Call Now	+20	Once per Day

Event Registration	Registered for any event	+15	Every Time
Event Attendance	Attended an Event	+20	Every Time
Event Missed	Missed an Event	-10	Every Time
Free Trial Request	Requested Trial/Call Now	+20	Once per Day
Gated Download	Filled Out Form for Download	+10	Every Time
Partner Registration	Partner registered for...	+10	Once per Day
Viewed Webinar Recording	Viewed recorded webinar	+5	Every time
Visits Any Web Page	Any web page (not careers)	+1	Every time
Opens Any Email	Opens any email	+1	Every Time
Clicks Link in Any Email	Clicks any email link (not unsubscribe)	+2	Every Time
Unsubscribes	Unsubscribes/Email Opt Out	-10	Every Time
Multiple Web Visits in 1 Day	More than 10 pages in a day	+10	Once a Day
Key Search Term Query	Their first visit found us via our top keywords	+5	Every Time
No Activity in 30 Days	No clicks, opens, visits, or form fill outs in past 30 days	-10	Every 30 Days
Subscribes to Newsletter	Opts in to X newsletter	+2	Each Time
Email Hard Bounces	Matches bad email reason	-20	Each Time

Sales Insight & Scoring



Note: if you do not use Sales Insight, you can skip this section.

Sales Insight relies on Lead Score and the change in Lead score to show Urgency and Relative Score to the Salesperson on the Lead record within Salesforce. Flames and Stars will not work without an active lead scoring system.



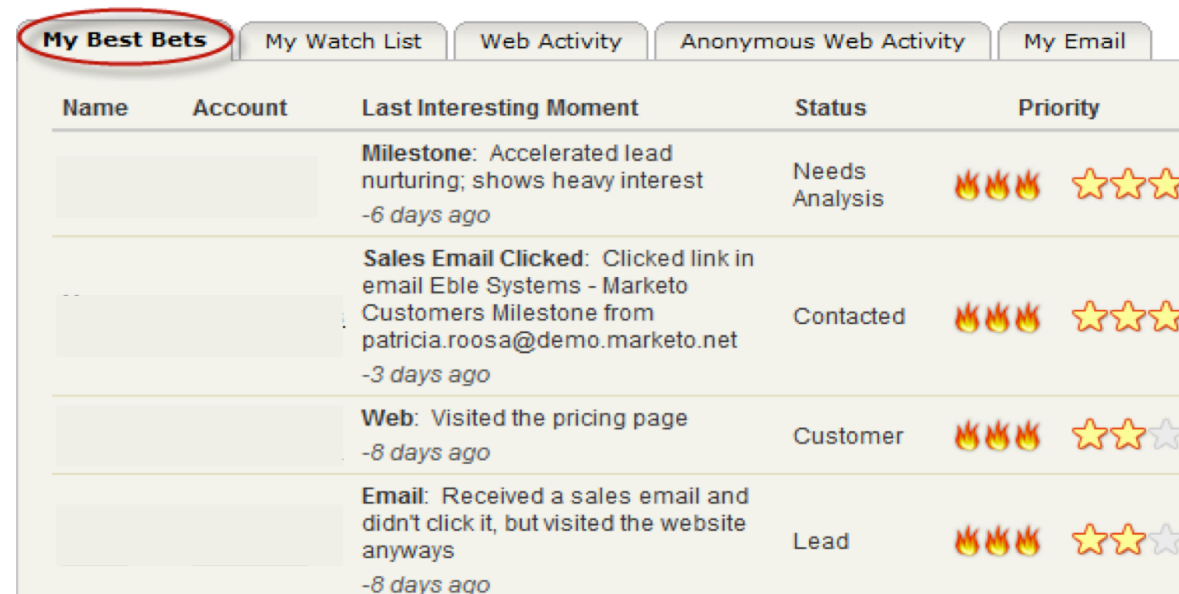
Urgency is a measure of the recent changes in a Lead's score. More activity over a shorter period leads to more Flames.



Stars are a measure of the Lead's score relative to all other Leads.

These scores will show up on Sales Insight on the lead record as well as on the **Best Bets** tabs to help Sales prioritize efforts. You should train your Sales team to recognize Flames, Stars, and Scores to better allocate time among their leads.

Here is what will appear when you click on the Marketo Tab in Salesforce.



Name	Account	Last Interesting Moment	Status	Priority
		Milestone: Accelerated lead nurturing; shows heavy interest -6 days ago	Needs Analysis	🔥🔥🔥 ⭐⭐⭐
		Sales Email Clicked: Clicked link in email Eble Systems - Marketo Customers Milestone from patricia.roosa@demo.marketo.net -3 days ago	Contacted	🔥🔥🔥 ⭐⭐⭐
		Web: Visited the pricing page -8 days ago	Customer	🔥🔥🔥 ⭐⭐☆
		Email: Received a sales email and didn't click it, but visited the website anyways -8 days ago	Lead	🔥🔥🔥 ⭐⭐☆

Reporting on Scoring

Threshold Analysis

After you are finished with the initial scoring updates, you can use Score Buckets to see where a possible MQL threshold can be drawn. Your first time out will work for a few days, then as behavior scores increase, you will likely need to (1) Increase the Threshold or (2) Increase negative scoring. Keep a close eye on this as you review MQLs, tweaking your model with every flaw you discover.

Score Buckets

Marketo recommends some basic reporting to see how your leads are doing. Use Salesforce or Marketo to bucket leads by score ranges. Here are a few quick examples

Salesforce Report

Step 1: Go to Reports Tab

Step 2: Press New Report

You may want to select **Leads** or **Leads with Converted Lead Information**, depending on your goal.

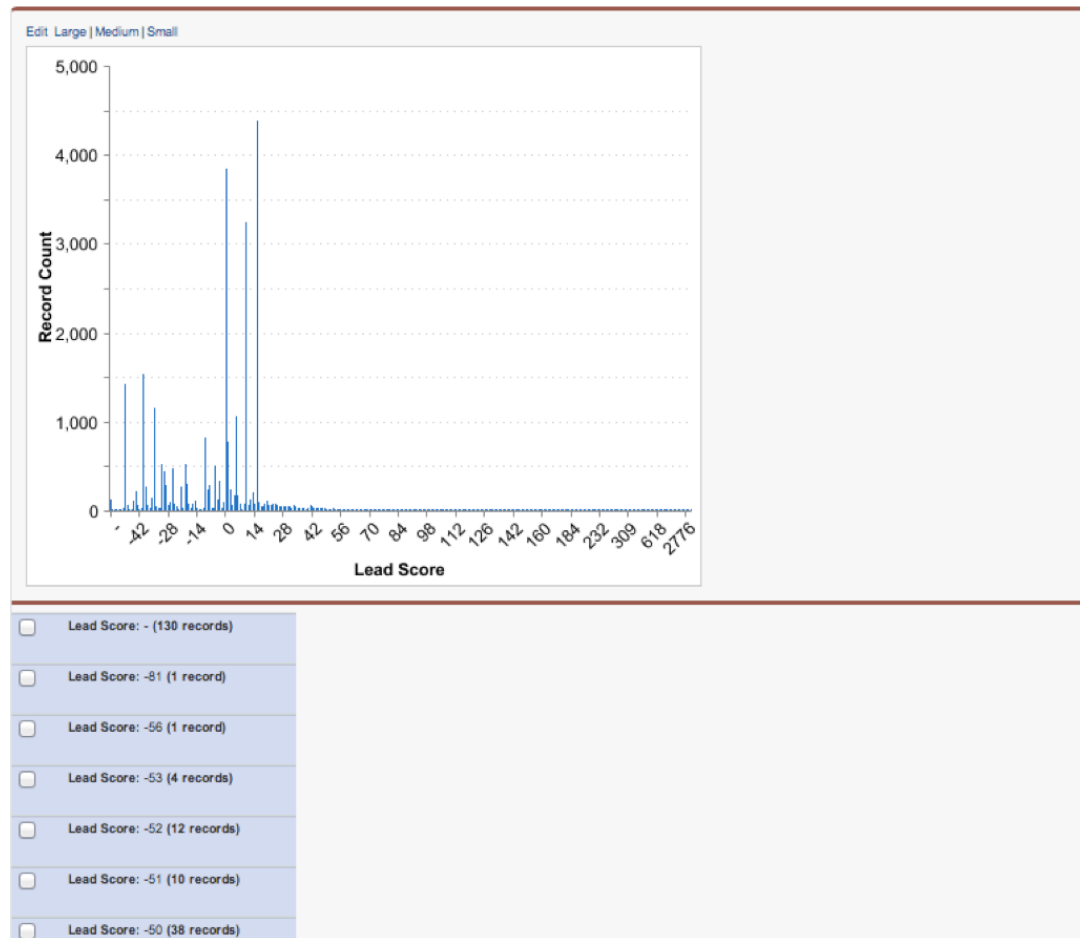
Step 3: Adjust date range and fields

Step 4: Group by Lead Score

Step 5: Add Chart Histogram

Step 6: Press Run

You will have a basic distribution chart and table with all leads in that date range bucketed by score. To take this further to bucket by score ranges, please consult with an SFDC expert.



Marketo Report

Step 1: Go to Reports > Lead Reports

Step 2: Create a new Lead Performance Report

Step 3: Adjust Setup

You should adjust the **Created Date** and other settings to view the desired Leads.

Step 4: Group by Lead Score

Sometimes I Group by Created Date so I can see how leads progress from creation until now.

Step 5: Custom Columns

Choose a Smart List to add as a custom column if you want to break down the buckets by Contacts, Leads, or another factor.

Step 6: Smart List

Be sure to exclude test leads. You may want to include all other leads to understand the true distribution.

Use Member of Smart List NOT IN

Step 7: Run Report

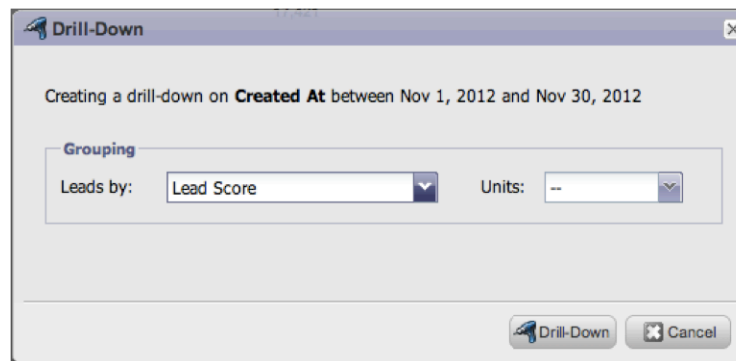


The screenshot shows the Marketo interface for a 'Lead Scoring Test Report'. The report is filtered for 'Lead Created At: Last 90 Days (Aug 27, 2012 - Nov 24, 2012 PST)' and 'Smart List: no rules'. The main table displays 'Leads by Created At / Months' with the following data:

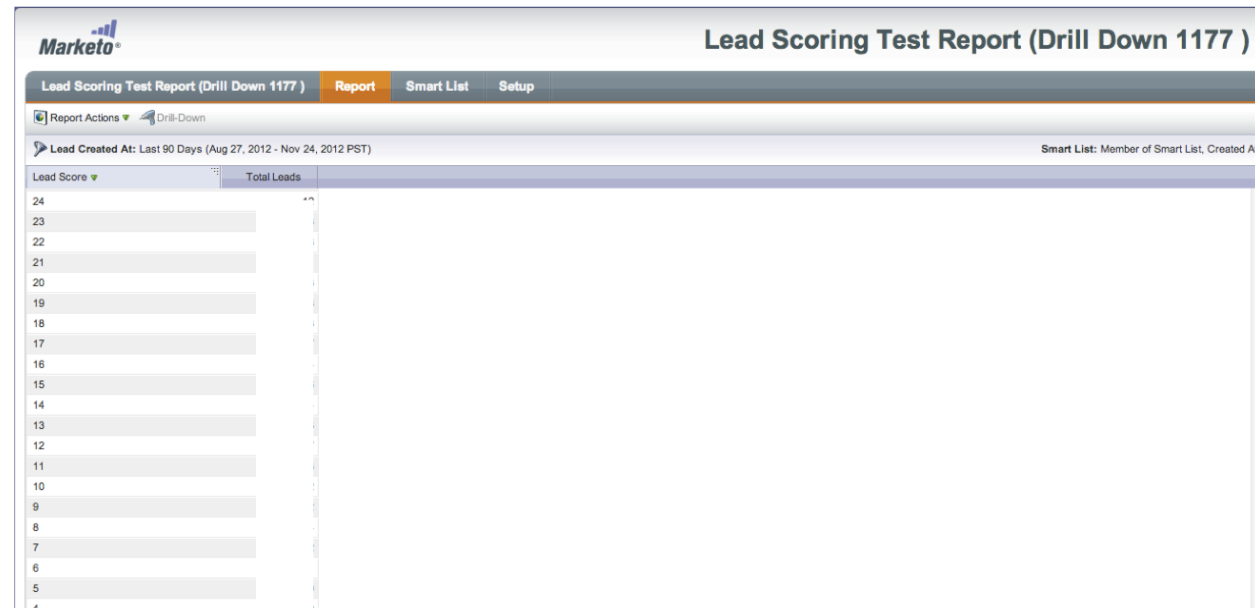
Created At	Total Leads
Nov 2012	6,521
Oct 2012	5,691
Sep 2012	4,415
Aug 2012	794
Total:	17,421

Step 8: Drill Down by Lead Score

Use the Drill Down function to go deeper into the Lead Score group or the Created At group.



The screenshot shows the 'Drill-Down' dialog box in Marketo. It is titled 'Creating a drill-down on Created At between Nov 1, 2012 and Nov 30, 2012'. Under the 'Grouping' section, the 'Leads by:' dropdown is set to 'Lead Score' and the 'Units:' dropdown is set to '--'. At the bottom, there are 'Drill-Down' and 'Cancel' buttons.



Opportunity Analysis

Pre-Score Model Analysis

In this report, you should analyze the data in your CRM before you implement automation or a new scoring model. For all of the Won Opps in the past 6 or 12 months, look at the Contacts (or Leads) involved. Analyze the common attributes such as Title, Function, Location, Territory, and Products to see who is buying. Also examine Lost Opps or Rejected Leads if possible. You may find possibilities for scoring you had not thought of.

- Are Rejected Leads similar to the Won Leads or Lost Leads?
- Which characteristics are common among the Won Opps? Lost Opps?

Buying Stage and Scoring

Using the Marketo's Definitive Guide to Lead Scoring as a starting point, determine your audience's buying cycle and the behaviors they exhibit over time. The best way is to setup a Revenue Cycle Model, although you can run

your own Stage model with fields and smart lists. You can create a field and a smart list (or Segmentation) to help watch these leads even if you aren't using RCM.

Step 1: Create a smart list for each stage

For example, `Early Buying Stage, Middle Buying Stage, Late Buying Stage.`

The criteria can be a score range or a set of behaviors. For instance, a Late Buyer would have an open Opportunity. A middle buyer may have reached a score threshold or taken several actions in the past 30 days. It's up to you.

Step 2: Create a field called Buying Stage

You will do this in `Admin>Field Management` which is covered in another chapter.

Step 3: Run a flow for Assign Buying Stage

`If Lead is in Early or Middle, or Late Buying Stage, then`

`Buying Stage = Early if in Smart List Early, etc.`

Step 4: Setup a Trigger Campaign to Capture Score Changes

This campaign will watch a Lead's behavior or score and move someone between each Stage as appropriate.

The other system is to use RCM if your version of Marketo has it. You can then run a Report or Smart List by Revenue Stage and Lead Score to see the counts by Score. If your model is flawed, you may see too many high scoring Leads in earlier stages or bunching up at the MQL or SAL stages.

Lost Opps vs. Won Opps

Every month or each quarter, review disqualified (or recycled) Leads and Lost Opps for scores and behaviors.

- Why did Sales recycle this lead?
- Which behaviors do the Lead exhibit?
- Did the score jump too quickly through website visits even though the demographics were not complete?

Also do this for Lost Opportunities. Your goal is to ensure your system is accurately scoring the behaviors and demographics most associated with creating Opportunities and Won Opps. The model should push the lead over to MQL at an ideal moment for sales to make a deeper connection so they accept the Lead. If you find Won Opps are exhibiting new behaviors or seem to be out of step with the model, it is time to make adjustments.

Buyer Personas

You may also want to see how your scores work with your Buyer Personas. If you setup a field to mark Buyer Personas, you can run a Persona report by score. You may find it interesting to run a pivot table to see which personas is winning revenue vs. their average scores.

ROI of Scoring

Marketo's Definitive Guide to Lead Scoring shows how to calculate the value of scoring, which in many respects is simply managing your leads better. A true scoring system is designed to hold leads back from sales until the scoring (MQL) threshold is reached.

In their example on page 47, Marketo shows a simple table like this:

Metric	6 Months Before Scoring	6 Months After Scoring
Leads Passed to Sales		
Opp Win Rate %		
Revenue per Deal		
Total Revenue		
% of Plan Achieved		
% of Reps Meeting Quota		
Time to Deal in Days		

Your ROI will show increases in Revenue, Win Rates, and Plan Achieved Rate, while lowering your Time to Deals and Leads Passed to Sales.

Lead scoring alone cannot achieve anything on its own. You must use this as part of a larger Lead Lifecycle System where you hold and nurture leads before passing them to Sales.

Case Studies

Podio

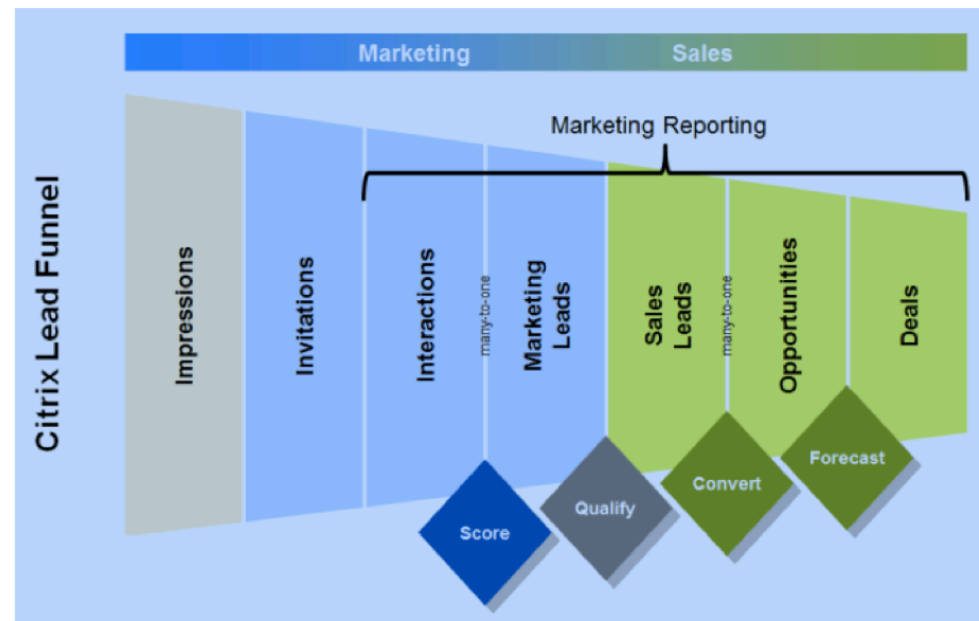
[Podio's presentation at the Marketo Summit 2012](#) showed us how they use the SOAP API to score in product behaviors such as using or not using their free trial. These triggers activated reminder emails directly as well as inside Podio, as if they could speak directly into the system. Sales also received these comments in a custom CRM, allowing different types of nurturing, both automated and human. Podio extended its product's capabilities using Marketo.

Citrix Predictive Scoring Model

Eva Tsai, Director of Marketing Operations at Citrix presented her [Predictive Scoring Model](#) at the Marketo Summit 2012. Eva and her team are hard core data junkies with an impressive system. Essentially she went back through mounds of data to determine if the scoring model worked, showing some Score Rules were not needed while others accurately predicted sales. I highly recommend reading the slides and slowly replicating Eva Tsai's plan after about a year of data collection.

Step 1: Pipeline Contribution Throughput

Establish your funnel or RCM with appropriate reporting for each stage and conversion rates. Your goal is to move qualification up the funnel to Marketing while optimizing scoring.



Step 2: Information Capture

Using Marketo, you will already capture demographic details.

Step 3: Profile Leads (Buyer Personas)

Create Buyer Personas appropriate for your organization.

Step 4: Behavior for Personas

Track and measure the behaviors at the Lead and Persona level.

Step 5: Establish Scoring Model (see above)

Using this guide, establish a scoring model. Your goal is to optimize this as you gather more data. Remember that if you use more scientific relative rankings, you will use less “art” at this stage.

Step 6: Understand Your Sales Funnel Over Time

You will need to establish reporting to develop at least 1 year’s worth of data to begin validation.

Step 7: Statistical Sample Design

If possible, select an appropriate random sample of Contacts to test for Opportunity Wins.

Step 8: Validate Scoring

Analyze the variables. Citrix used 327. This will depend on your firm. Once you know which scores are predicting Won Opps, you can also weed out scores that do not predict.

Step 9: Increase Sales Productivity

- Watch regional differences
- Decrease lead volume and achieve same opportunity flow. This will save you money or free up money to invest in programs targeted at predicted buyers.
- Increase opportunity pipeline with same volume of leads

Chapter Review

Self-Quiz

What is a demographic score?

What are examples of behavioral scores?

Why should you avoid back scoring behavioral triggers?

Recommended Resources

Marketo Documentation

[Definitive Guide to Lead Scoring](#)

[Sales Insight Fundamentals](#)

[Basic Scoring Setup](#)

[Lead Scoring Glossary](#)

Marketo Community

[Merging records and adding scores](#)

[Changing an Old Scoring Model](#)

[Changing Scoring Models](#)

[Clicks Link in Email and Scoring](#)

[Scoring and Segmentations](#)

[Comparing Scores](#)

[Citrix and Predictive Lead Scoring 2012](#)

Lead Scoring Using Programs: [Yes](#) or [No](#)

[Creating Lead Score Fields](#)

Tools

[SurveyMonkey](#)

[Relative Ranking Sales Survey Starter Kit \[PDF\]](#)

[Lead Score Planning Tool](#) [XLSX]

[Sales Guide to Scoring](#) [PDF]

Experts

[Aberdeen Lead Scoring Prioritization](#)

[Sirius Decisions](#)

[The Pedowitz Group](#) (Nic Zangre and Scott Benedetti)

[Lead Lizard](#) (Sam Boush)

[Elixiter](#) (Andrew Hull)