**Worksheet: Build Lead/Person Scoring in Marketo Engage**

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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! Together with Sales you determine which leads you want to hand off to them. This can either be determined by a minimum of behavioral scoring, demographic scoring, or both.

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).

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## **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 Engage.

**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 intent to buy** | **Activities indicating NO 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 demo form |  |

Your turn:

|  |  |
| --- | --- |
| **Activities indicating intent to buy** | **Activities indicating NO intent to buy** |
|  |  |
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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 to meet it. After all, you don’t want someone to become qualified off one email open! If you just started, try working with a threshold of 100 and building out your lead scoring from there. Whether or not you want to set a high or low threshold depends on which leads Sales is most interested in receiving.

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 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 a white paper | +5 |
| Visit us at a tradeshow | +15 |

Your turn:

|  |  |
| --- | --- |
| Threshold for sales handoff = \_\_\_\_points | |
| Activity | Score |
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Congrats! You’ve put together a basic behavioral scoring model.

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# **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 on 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 Engage 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 |
| Job title | Director, Vice President, C-Level |
| Department | HR |

Your turn:

|  |  |
| --- | --- |
| **Category** | **Ideal Prospect Characteristics** |
| Industry |  |
| Company size |  |
| Job title |  |
| Department |  |

Example:

|  |  |
| --- | --- |
| **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** |
|  |  |
|  |  |
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|  |  |

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

## Now try this in Marketo Engage:

Take the lead scoring system you’ve outlined here and build out your lead/person scoring in Marketo Engage. Check this [tutorial](https://experienceleague.adobe.com/docs/marketo-learn/tutorials/lead-and-data-management/lead-scoring-watch.html?lang=en) and [demo](https://experienceleague.adobe.com/docs/events/marketo-and-mochas-recordings/2023/lead-scoring.html) to get started.

* The Marketo Engage Reference Library includes several starter programs you can import directly into your instance to kickstart building programs that will help support your team. Under Marketing Activities, click the ‘New’ dropdown and select ‘Import Program’. Search for an existing lead/person scoring program and [import it into Marketo Engage.](https://experienceleague.adobe.com/docs/marketo/using/product-docs/core-marketo-concepts/programs/working-with-programs/import-a-program.html)
* 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 Engage.
* After you build your model, consider [setting up an alert](https://experienceleague.adobe.com/docs/marketo/using/product-docs/core-marketo-concepts/smart-campaigns/flow-actions/send-alert.html) to go out to Sales once the lead’s score has reached your sales handoff threshold.

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# **Exercise 3: Incorporate local flexibility in your scoring model.**

To deliver predictable outcomes with your Marketo Engage person scoring model, the scores you apply need to reflect the real business value of the scoring elements compared to each other. But business value may vary in different markets and you’ll want to consider allowing for local influences while keeping global consistency across your organization. Follow the exercise below to set up a transparent and scalable lead/person scoring model.

1. Take the activities and characteristics from exercises 1 and 2 and determine for each whether they are the same for all markets or can be different per market or product line.

Example:

|  |  |  |
| --- | --- | --- |
| **Signal** | **Global** | **Local** |
| Activities | Filled out “Request a demo” form  No interaction in last 90 days (about 3 months) | Visit us at tradeshow  Download a white paper |
| Characteristics | Department  Job title​ | Industry  Company size |

2. Define your scoring matrix. Things to consider when defining your matrix for the local market:

* Set up a different matrix for demographic and behavior elements.
* Number of priorities: How many different topics are you asking for the local team's input on?
* Number of value options: How many individual values are you rating within your topics?
* Individual values:
  + Align relative worth with global scores
  + Define common scenarios and test your overall scoring for them

Example:

|  |  |  |  |
| --- | --- | --- | --- |
| **Demographic matrix** | **Priority 1** | **Priority 2** | **Priority 3** |
| High values | 20 pts | 10 pts​ | 7 pts​ |
| Medium values | 10 pts | 7 pts​ | 3 pts​ |
| Low values | 5 pts | 3 pts​ | 1 pt​ |

Your turn:

|  |  |  |  |
| --- | --- | --- | --- |
| **Demographic matrix​** | **Priority 1​** | **Priority 2​** | **Priority 3​** |
| High values |  |  |  |
| Medium values |  |  |  |
| Low values |  |  |  |

Collect input from your local or regional sales teams and fill out the below.

Example:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Implement topic?** | **Demographic / Behavioral** | **Topic** | **Priority** | **Values** | **Score** |
| REQUIRED | Demographic | Industry | Prio2 | Technology | High |
| Fashion | High |
| Retail | Medium |
| Manufacturing | Medium |
| Healthcare | Low |
| … | Low |
| Yes | Demographic | Company size (employees) | Prio3 | >1000 employees | High |
| 250-999 employees | Medium |
| 1-249 employees | Low |
| No | Behavioral | Page visits on your local website | Prio2 | Product information pages | Low |
| Pricing pages | Medium |
| Demo request pages | High |

* Clearly mark (here in grey) what can be adjusted. Lock down what cannot be adjusted.
* Note: No individual scores are included in this example – Let the team focus on the relative worth of the different topics. Of course, you should have your full model documented as a background material.

Your Turn:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Implement topic?** | **Demographic / Behavioral** | **Topic** | **Priority** | **Values** | **Score** |
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## Now try this in Marketo Engage:

1. Create two versions of the scoring program:
   1. A central program that runs all scoring that cannot be updated locally.
   2. A local copy with the scoring elements that are configurable.
2. Set up your scoring values as tokens within your program.
3. Adjust your local Smart Campaign
   1. Set up your triggers and filters to score only on the first capture of data.
   2. Make sure your choices are mutually exclusive.
   3. Make your updates in both flow steps so the Person Score is updated in an identical way to the Demographic Score.