



# User Group - Twin Cities

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Lead Scoring Made Simple Workshop

March 30, 2022

**#TCHUG**

# Welcome!

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HubSpot Twin Cities User Group is a community of HubSpot software customers and thought leaders. This group meets to discuss product updates, learn new best practices, and network with each other.

We'll have quarterly meetups (virtually for now) in 2022.



**Adam Stewart**  
Denamico  
CMO



# Housekeeping

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Please feel free to ask questions and share comments or reactions in the chat functionality.

We'll have a few minutes for Q&A at the end of the discussion.



# About Denamico

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Denamico is a Diamond Tier HubSpot Solutions Partner in Minneapolis.

We have hosted Twin Cities HUG events since 2014.



# denamico



# Our Speaker

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Aaron is VP of Operations at Denamico.

Aaron brings proven experience and accomplishments in finance, sales, IT, and management. He has a strong track record of improving productivity using HubSpot and other cloud-based software. Aaron is focused on transforming the way teams operate by solving complex problems with impactful solutions and building a community of HubSpot & RevOps Champions.



**Aaron Rickard**

Denamico  
VP of Operations



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# Lead Scoring Made Simple





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# Agenda

- 01 | What, why, and when to use lead scoring
- 02 | Designing the 3 Stages of a lead score model
- 03 | Examples
- 04 | Best Practices
- 05 | Q&A

## You Will Need

Lead scoring workbook



# What, Why, And When To Use Lead Scoring





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# Lead scoring is not...

- An automated 100% perfect solution for converting leads to sales
- A highly secret computer algorithm
- Something you need a statistics degree to build



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## Lead scoring is...

If a record meets the criteria set in the Positive section, points are added to the score. Once they don't meet the criteria, those points will be removed from the score

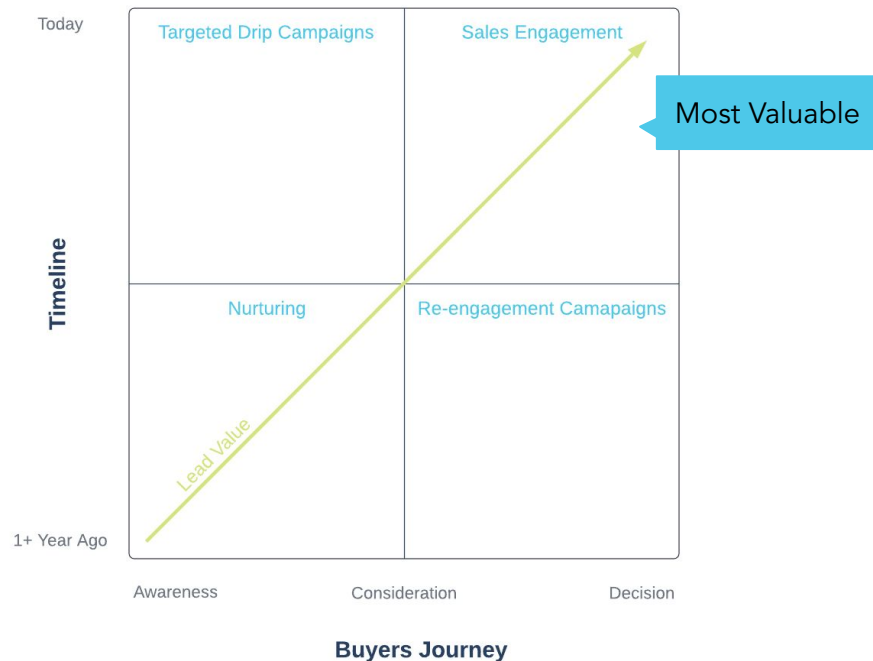
- A simplified scoring tool
- A way to establish clear business rules for Marketing > Sales handoff
- A tool to quantify value for:
  - Number of activities
  - Type of activities
  - Timeline of activities



# Driving Scoring Of Leads



Lead Value Compared To Timeline and Buyers Journey





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## Lead scoring users look like...

### Teams who have:

- Multiple digital marketing touch points
- Require a handoff to sales or have a digital sales channel to drive
- Marketing events tracking in Hubspot



# HubSpot Tools Needed

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At least one of the following subscriptions:

- Marketing Hub Professional or Enterprise
- Sales Hub Professional or Enterprise
- Service Hub Professional or Enterprise
- Operations Hub Professional or Enterprise
- CMS Hub Professional or Enterprise

Ideal event tracking to include in a lead score model:

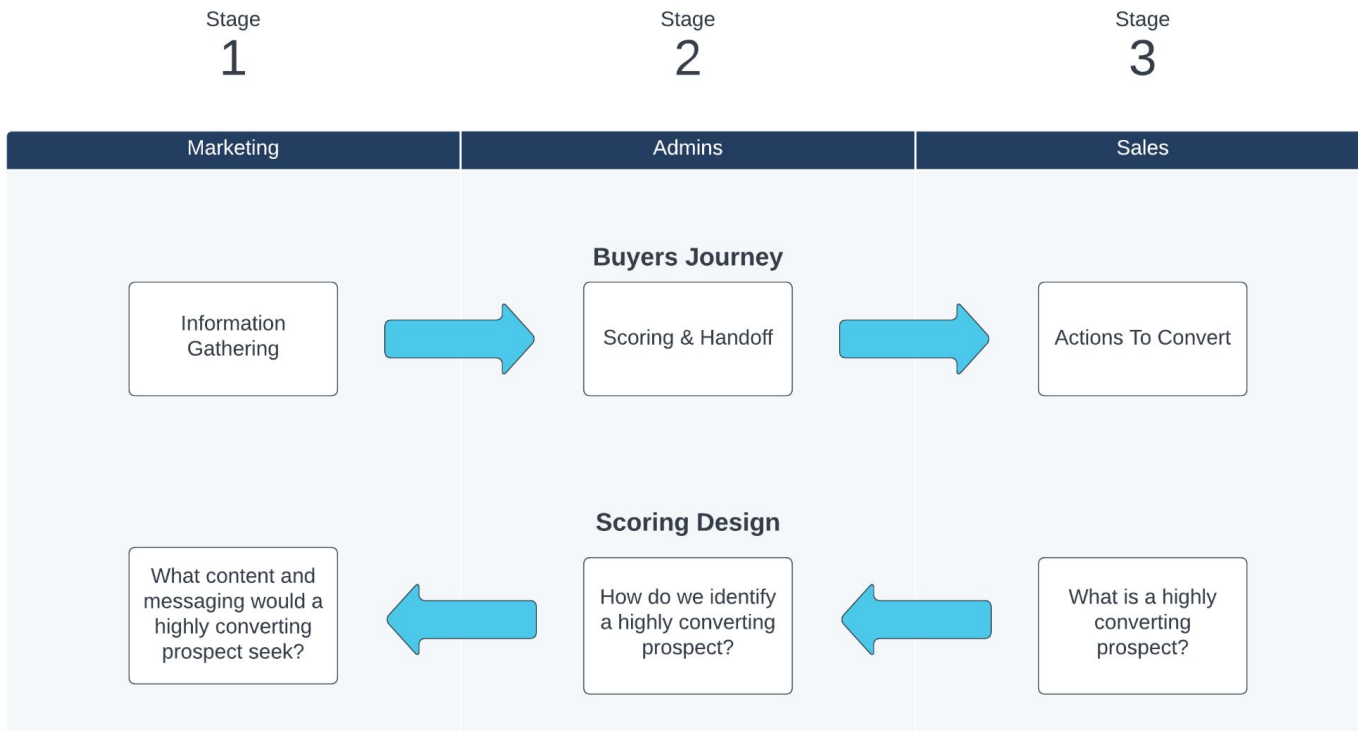
- Page Views
- Form Submissions
- Contact Properties
- Likelihood to Close
- Ad Clicks
- CTA Clicks
- Conversations



# Designing The 3 Stages of a Lead Score Model

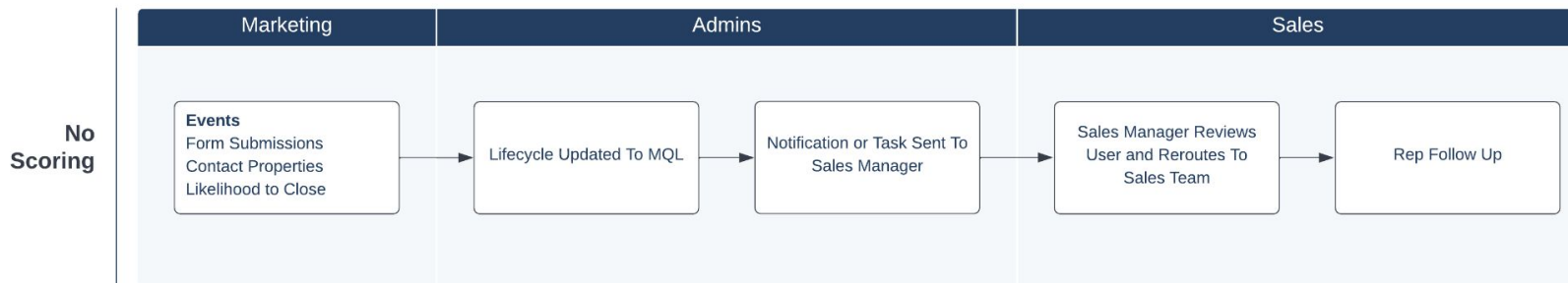


# The 3 Stages Of Lead Scoring





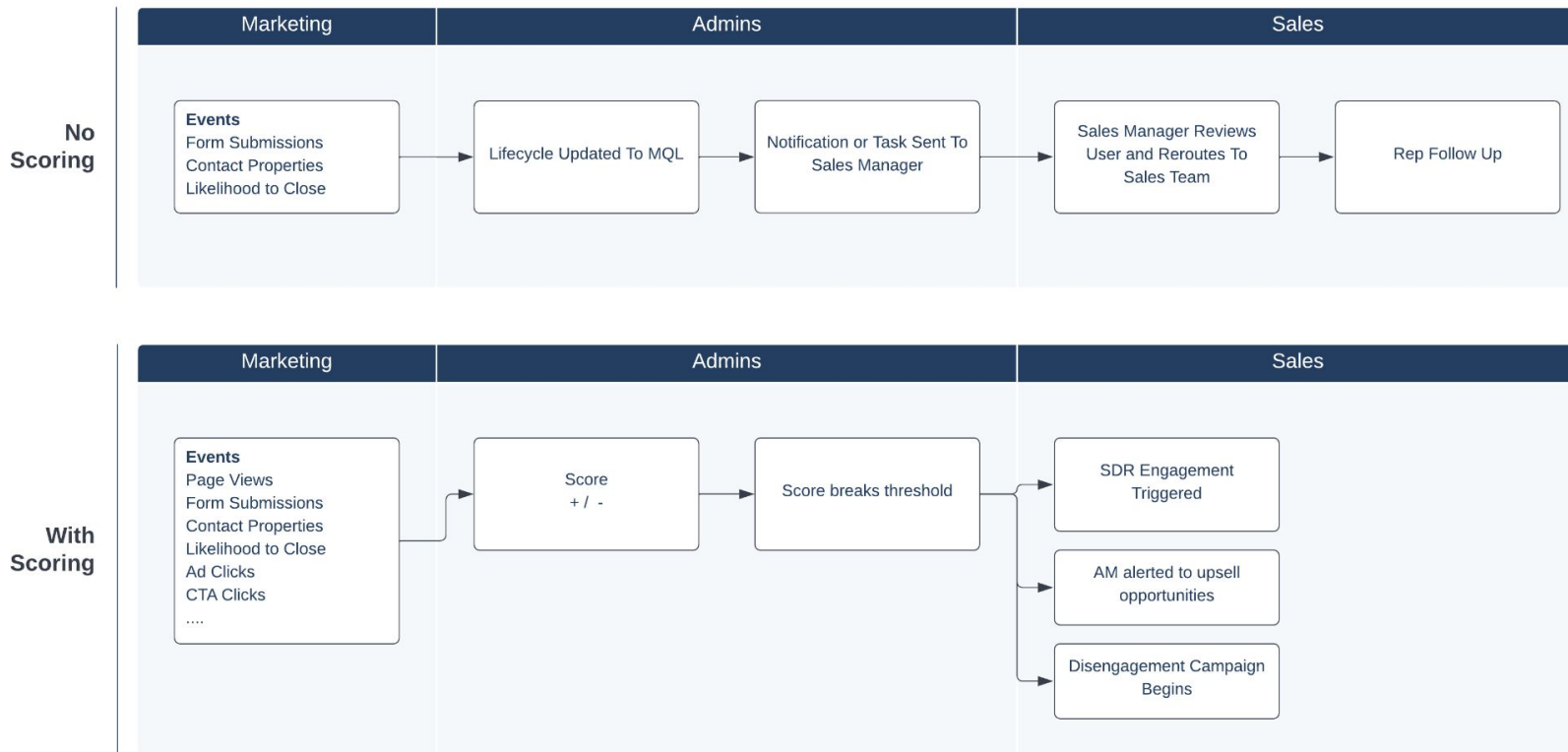
# What This Commonly Looks Like







# How Lead Scoring Changes This





### Pattern 1

## Prospect Likely To Convert

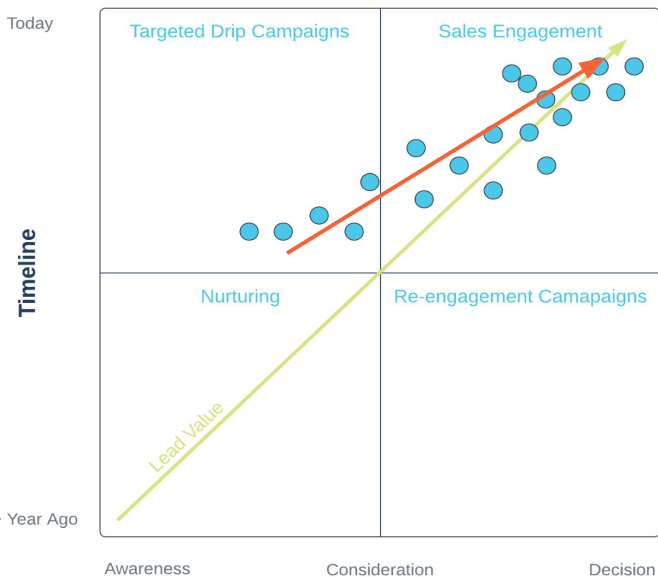
### Pattern 2

## Prospect Came In Backwards

### Pattern 3

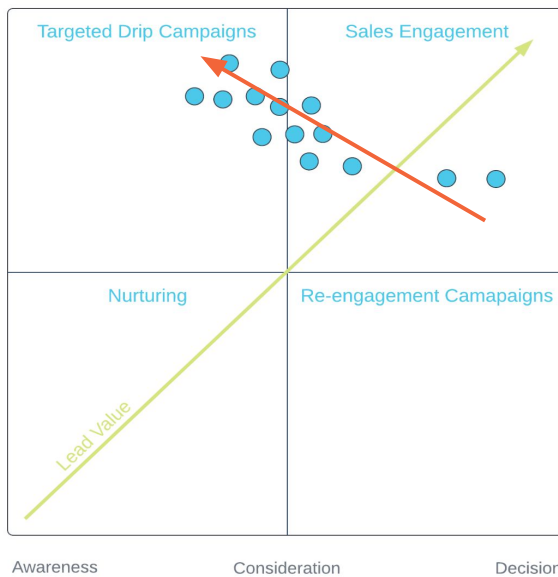
## Prospect Engaged but Unlikely

Lead Value Compared To Timeline and Buyers Journey



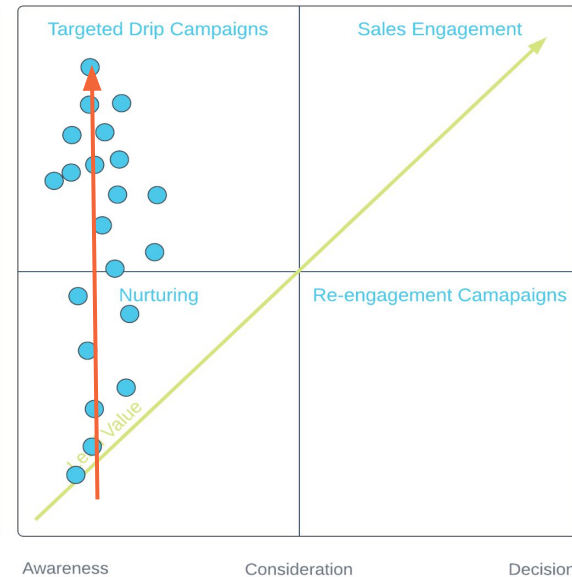
Buyers Journey

Lead Value Compared To Timeline and Buyers Journey



Buyers Journey

Lead Value Compared To Timeline and Buyers Journey



Buyers Journey



# Prioritize Scoring On Highest ROI

	Current Lifecycle	Pattern 1 Prospect Likely To Convert	Pattern 2 Prospect Came In Backwards	Pattern 3 Prospect Engaged but Unlikely
New	Subscriber, Lead	Phase 1	Phase 3	Phase 4
	MQL	Phase 1	Phase 3	Phase 4
	SQL	Phase 1	Phase 3	Phase 4
	Opportunity	Phase 1 (Digital)		
Existing/ Cross Sell	Customer	Phase 2		
	Evangelist	Phase 2		

# Example

Using the workbook we provided





# Starting Your Scoring Model

	Stage 1 Information Gathering	Stage 2 Scoring and Handoff	Stage 3 Actions To Convert
Who	Marketing	Admins / Marketing	Sales Leaders
What	<p><b>Define categories</b> of content and inputs that can be drive routing</p> <p>Ideally separate content into groups based on buyers journey (awareness, consideration, decision)</p>	<p><b>Determine criteria</b> grouping based on activity counts, and timelines.</p> <p>Create active lists grouping into these categories.</p>	<p><b>Assign point values</b> to each category and grouping determined by prior two users.</p> <p>Determine what should happen to prospects when point threshold is passed.</p>



# Workbook Example



## Lead Scoring Workbook

Marketing

Admins

Approved by Team 3

Approved by Te

Sales Leaders

Category	Activity	Date Range Condition	Other conditions	Score
Email - Awareness Level	Opens < 3 OR Click Through < 2	Most recent open in the last 3 months		1
Email - Awareness Level	Opens < 3 OR Click Through < 2	Most recent open outside the last 3 months		-1
Email - Awareness Level	3 < Opens < 6 OR 2 < Click Through < 4			1
Email - Awareness Level	6 < Opens < 10 OR 4 < Click Through < 8			2
Email - Awareness Level	10 < Opens < 15 OR 8 < Click Through < 12			2
Email - Awareness Level	Opens > 15 OR Click Through > 12			3
Email - Consideration Level	Opens < 3 OR Click Through < 2			3
Email - Consideration Level	3 < Opens < 6 OR 2 < Click Through < 4			4
Email - Consideration Level	Opens > 5 OR Click Through > 3			5
Email - Decision Level	Opens < 3 OR Click Through < 2			4
Email - Decision Level	Opens > 2 OR Click Through > 1			5



# Translating into Hubspot

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## 5 Steps to implement a scoring model:

1. Gather the list you completed
2. Hubspot admins create dynamic lists matching the criteria outlined in the worksheet. 1 list per criteria, with exclusions setup to exclude any list in the same group.
3. Hubspot admins setup a score property on the contact that assigns the list the admin created to the score outlined in the spreadsheet.
4. Hubspot admins create a handoff workflow that routes leads, and timestamps properties when a contact breaks the scoring threshold
5. Save a copy of the spreadsheet you entered for future reference if needed

# Best

# Practices

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Things to keep in mind as you use/implement lead scoring in your business.





# Making Adjustments

What happens if we aren't getting the right outputs?

	Scenario 1 Not Enough Leads Hitting Handoff	Scenario 2 Consistent Amount Of Leads Hitting Handoff	Scenario 3 Surplus Of Leads Hitting Handoff
How to adjust	Lower your handoff point threshold	Do not adjust your handoff point threshold	Increase your handoff point threshold
Causes	<ul style="list-style-type: none"><li>• Very few conversion paths</li><li>• A very niche product/service</li><li>• Are an early-stage startup.</li></ul>		



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# Using Negative Criteria

What things should signal this prospect is not a good fit

- Opting out of email - Obviously not a great sign
- Visiting the "Careers" page - Usually means that the visitor is looking for a job, not a product/service
- Job title being equal to roles that aren't good fits
- Country being not equal to the areas in which the business operates
- Company employee size OR revenue being known and less than the desired threshold



# Best Practices For Marketing

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1. Organize your content & marketing into groups associated with the buyer's journey
  - a. Standardized URL format for CMS (*yourdomain.com/subgroup/page*)
  - b. Forms grouped for buyers journey
2. Standardize naming, URLs and content grouping to simplify the work required by your HubSpot admin to setup routing and scoring automation in HubSpot



# Best Practices For Admins

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1. Create a fixed lead score value when handoff occurred that you can use for future reference. You can copy the current score to a fixed property using a workflow
2. Try to only change the scoring methodology once every 6 - 12 months, so that you have consistent data to work from
3. If you need to increase or decrease the number of leads sales receives, change the handoff threshold criteria in your handoff workflow instead of changing the scoring criteria
4. You have multiple scoring properties available (total available is dependant on your plan) that you can use for different "phases" or for split testing two scoring criteria
5. Keep all lead scoring lists in a folder
6. Use a data enrichment service like Clearbit



# Best Practice Notes For Sales Leaders

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1. Use the scoring worksheet, and create multiple scoring scenarios to test your criteria
2. Look at weekly reports to see how many lead scores grew, and see how many are close to reaching your threshold (ie: if your handoff threshold is 55, and you have 50 leads at a 52, you may want to have a plan in place)
3. Revise your scoring model every 6 - 12 months if needed. You need time for data to aggregate or you will never be able to test accurately
4. Create not only a lead conversion plan, but also an abandoned cart plan, and customer disengagement plan for customers that are reversing out of qualified leads.

# Additional Support Resources

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1. [\(HubSpot Academy\) Understanding HubSpot Lead Scoring](#)
2. [\(HubSpot Academy\) Lead Scoring & Lead Routing with HubSpot](#)
3. [\(Knowledge Base\) Setup Score Properties to Qualify Leads](#)
4. [Setup a lead score that makes sense](#)
5. [Clearbit Data Enrichment](#)

# Q&A

Send any questions to the chat



# Looking for advice specific to your situation?

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Schedule a 15-minute lead score strategy discussion with our team

## We can help you

1. Identify what type of lead score strategy would be most valuable to your business & current situation
2. Identify attributes or values for your lead score model
3. Answer additional questions about implementing lead scoring
4. Troubleshoot & resolve challenges related to launching your lead score or lead hand-off process in HubSpot



# Q2 HUG!

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**Wednesday, May 18**

TC HUG members will be notified via email leading up to the event.

[events.hubspot.com/twin-cities](https://events.hubspot.com/twin-cities)





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# Contact Us

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