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KNOW THE SCORE:

The Ultimate Guide to Scoring
Customers and Prospects



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SILVERPOP

Know the Score:

The Ultimate Guide to Scoring Customers and Prospects

From predicting political election outcomes to analyzing athletic performance to searching for cancer cures, numbers, data, formulas and algorithms are playing a bigger role than ever in modern society. The business world is no exception, with marketers scrambling to get their heads around customer and prospect data. For many savvy marketers, a key component of understanding this data involves implementing scoring models to help identify, evaluate and communicate with contacts.

Of course, scoring isn't a new concept — B2B marketers have been using it for years to gauge prospect interest and intent, with best-in-class organizations 36 percent more likely to use it than the average business³. But today, the influx of behavioral data and the increased power of marketing technology platforms have combined to shatter traditional notions of "scoring," and the range of what you can do with it has exploded.

Evolving Customers, More Data

These days, time-starved customers and prospects have easy access to product, brand and company information, which translates to higher expectations for how you communicate with them. As a result, capturing the when, where and what of how contacts interact with you and incorporating it into your marketing database so you can be more relevant has become essential. That means reaching across devices and beyond email clicks into social activity, video downloads, mobile Web page views and much more.

But once you have the data, how do you make sense of it and act on it? It can be overwhelming, even for experienced marketers. One way to harness this data is by setting up a scoring system in which you take certain demographic attributes and behaviors that are indicative of engagement or interest and assign them point totals, enabling you to rank contacts depending on the objective you're trying to achieve.



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HOW SCORING EMPOWERS YOU

Whether you're selling software to big businesses as part of a complex, lengthy sales cycle or running shoes to weekend warriors via an ecommerce platform, you can benefit from developing or enhancing a scoring model. Want to create gather key data, measure contact engagement across channels or further target offers? Looking to identify inactives or eliminate those that don't fit your target market? Scoring can help.

Scoring creates a standard set of definitions and processes that can be communicated throughout the organization. And best of all, it enables you to dynamically segment your contacts based on a combination of continuously changing variables – a key step in delivering one-to-one communications.

For B2B marketers, scoring allows you to quickly distinguish between prospects who are ready to buy and those that need to be nurtured, improve sales and marketing alignment, establish discrete segments for inside versus outside sales, enable automated and more sophisticated lead routing, and nurture prospects more effectively. On the B2C side, scoring can help you create loyalty programs or incorporate "gamification" into your marketing initiatives, which can engage customers in creative and memorable ways or play a vital role in predicting future buying intentions.

Furthermore, the combination of scoring and automation allows marketers to move beyond the traditional practice of manually pulling a list of contacts in a certain score range and sending them a message on the company's timetable.

Instead, automation enables you to send a message when each individual performs an action that suggests they're ready to interact with or buy from you.

Finally, while savvy marketers are using scoring to change the email content individuals receive, routing them down new message tracks or serving up dynamic content based on their score, its impact goes far beyond email. Today, you can use contact scores to trigger real-time responses both online and offline.

THE BASICS OF SCORING

Scoring is a method of assigning points to different criteria for each person in your database. In general, the more pieces of data you build into your scoring system, the more accurate it will be. So, you'll typically want to include both demographic data (information provided directly to you by the contact) and behavioral data (information based on the contact's actions) in your scoring model. (For more details, see the "Building a Good Scoring Model" section on p. 4.)

You can then use these scores to rank contacts according to whatever parameters are important to your business, such as a prospect's level of interest or your customer's level of engagement. For example, you might create "Hot," "Cold" and "Lukewarm" tiers (or whatever descriptions work for you). You can play with the values to determine what scores make the most sense. And you can (and should) edit them at a later time based on your learnings.

When developing your system, it's important to get input from multiple departments. Bring together a group of individuals who are familiar with your



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prospects and customers and can help you identify the quality-indicative attributes and how they should be ranked. Keep the group small to remain focused and efficient — three to five people is often ideal.

Once your scoring system is in place, you can combine it with automation to trigger emails, content, re-routing, etc. For example, if your scoring system divides people into “highly interested,” “likely to convert” and “highly likely to unsubscribe” groups, you can launch automated programs to try to turn loyal customers into even stronger brand advocates (“highly interested”), facilitate conversions (“likely to convert”) and re-engage stragglers (“highly likely to unsubscribe”).

BUILDING A GOOD SCORING MODEL

As mentioned previously, you need both demographic and behavioral data to ensure scoring accuracy. Let’s take a closer look at some of the attributes and limitations of each.

Demographic Information

Demographic scores are based on information provided by or about the prospect – company size, job title, geographic location and more. A customer or prospect’s demographic data refers to characteristics of both the individual and, in some cases, his or her company (often called “firmagraphic” information). Examples include:

- Name
- Birthday
- Gender
- Occupation
- Email address
- Company name
- Company size

Demographic and firmagraphic information can be vital to an overall score, particularly as you’re able to identify key attributes of prospects that generate sales. For example, you might find that midsize companies in the Western United States have a greater affinity for your product than those on the East Coast. You can then adjust your marketing efforts and scoring model accordingly.

Particularly for B2B companies, a person’s psychographic information is also a key part of the demographic data picture. Psychographic data is self-declared information that indicates how the person feels about a purchase, and is especially critical for B2B lead qualification or B2C models involving big-ticket items. When the right questions are asked and input on forms is accurate, psychographic information can signal a prospect’s readiness to be passed on to sales.

Key psychographic information that’s necessary to accurately score a contact encompasses the classic BANT model:

- Does the prospect have the **budget** to purchase your product?
- Does the person have the **authority** to make a buying decision?
- Does the contact **need** the product?
- What is the person’s **timeline** for purchase?

This BANT methodology can help you grade opportunities and identify appropriate tactics for moving a contact toward a purchase.



Limitations of Demographic Data

Although demographic, firmographic and psychographic information can be critical to a scoring model, each of these pieces of data has pitfalls, mostly related to people being inaccurate about the information they provide.

Challenges and limitations include:

- **Self-reported information can be aspirational:** People may give answers they believe are desirable, such as overstating the size of their company or job role.
- **Self-reported information can roll toward the mean:** Conversely, prospects may downplay organizational size or personal wealth in an attempt to avoid sales harassment.
- **People are sometimes untruthful:** For reasons ranging from annoyance to secrecy, customers and prospects reluctant to reveal personal details may enter incorrect information.

Bottom line: In today's era, where empowered customers have access to third-party company and product information and time is at a premium, collecting demographic data can be challenging.

Tips for Collecting Demographic Data

When determining how to best collect demographic data, remember that you don't have to collect all the data at once, and that building trust may be necessary before collecting more personal information. With that in mind, here are seven tactics you can use to collect demographic data:

1) Ask for minimal information at the start. Would you ask someone you just met for his life history? Probably

not, so take the same approach with new contacts. Just gather a few pieces of key data. If you must offer a longer form, consider making some of the questions optional and/or including information about why you're collecting the data.

2) Offer good value in exchange for information. Don't ask 12 questions in exchange for information the contact can grab for free in elsewhere on the Web. Provide valuable content in exchange for personal data. Also, consider using a post-download thank-you page or a post-event satisfaction survey as places to ask for details.

3) Use progressive profiling. To collect more actionable data without scaring off contacts with long forms, try using a progressive Web forms builder to pose new questions each time a contact visits your website or landing page, steadily gaining deeper insight into their interests. Just set up a few basic rules, and you can ask contacts for one or two additional pieces of information at every interaction.

4) Gather data through social sign-in. Offering site visitors the option of registering via their social network login reduces form abandonment and enables you to collect more data without having to ask too many questions. If a business offered social login and a visitor registered via LinkedIn, for example, the company would have access to a verified email address.

5) Implement a preference center. People's interests, job titles, location and more change over time. Make it easy for customers and prospects to provide this information by linking to it at registration and in a



How Scoring Helps You Connect on an Individual Level

View the video >>>

welcome email, then providing periodic reminders in your communications for contacts to update this information.

6) Append third-party data. Depending on your marketing technology platform, you may be able to tap third-party sources to append data in real time to new prospects who complete forms on your site with just an email address. There are hundreds of categories available to append, from physical addresses and basic demographics to shopping behaviors, hobbies and interests.

7) Make it easy for customers and prospects to provide data across platforms. In today's multichannel world, you can't count on contacts entering information via your website, so make sure you have an automated process in place for collecting data across channels. Maybe you use SMS at events for opt-in, have a scannable QR code at the cash register, or place an iPad at your trade show booth to collect names and automatically feed them into your master database.

Even using the best tactics and technologies available, though, self-declared data only provides part of the picture of your customers and prospects, which is why you need to factor behavioral data into your scoring model as well.

Behavioral Information

In the behavioral part of your scoring model, you'll assign points based on the specific actions a person undertakes. Of course, there may be hundreds of behaviors your contacts take, so for your scoring model you'll want to choose only those activities that you believe indicate that a person is highly engaged with you.

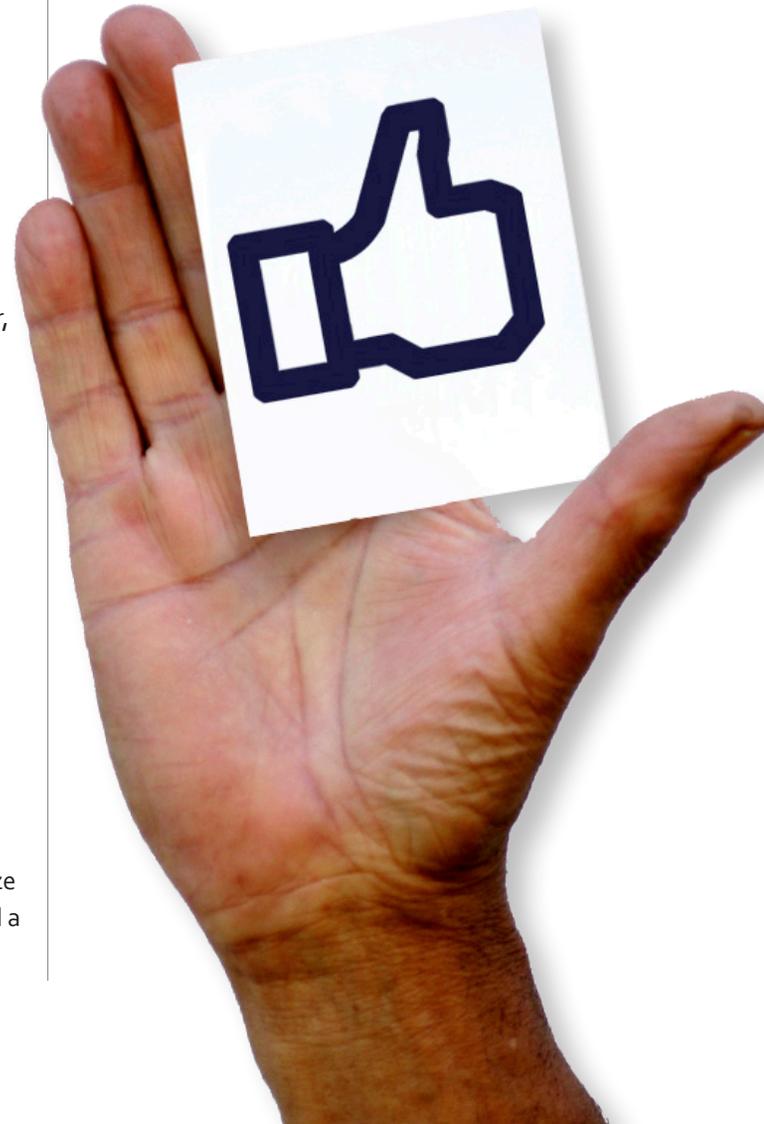
For example, if someone visits your homepage, it might not tell you much about their level of interest or engagement, but if that person drills four levels into your website to a specific product page, that action might imply a keen interest – one that warrants a higher score.

While the significance of customer and prospect actions will differ from business to business, some of the behaviors you may want to consider scoring include:

- Email opens and clicks
- Web page visits (including those people are taken to after completing a form)
- Social sharing of emails or website content
- Visits to blogs and communities
- Comments on blog posts
- "Likes," "Follows," or "Adds" on Facebook, Twitter, LinkedIn, etc.
- Participation in Facebook polls
- Video viewings
- Downloads (Webinars, white papers, how-to guides, etc.)
- Custom behaviors (free trial editions, financial calculators, online tools, etc.)
- Newsletter sign-up
- Shopping cart abandonment
- Calls to sales or support
- Demo request

Limitations of Behavioral Data

While the saying "actions speak louder than words," often applies to scoring, it's still important to recognize that scoring on behaviors alone isn't sufficient to yield a truly accurate customer or prospect score.



Consider a single male 40-something customer who buys some Justin Bieber paraphernalia for his niece. Based on his browsing history and purchase, his behavioral score alone might place him in the “Bieber fever” fan category and put him on the receiving end of your next message touting the latest Bieber gear. But balanced with demographic data (along with frequency adjustment, see p. 8), his score will more accurately reflect his interests.

Tips for Collecting Behavioral Data

With just a little coding on your website, you can start collecting individual behaviors – what Web pages a person visited, whether he or she commented on a blog, if the contact watched a video, etc. – behaviors that will enrich your database and improve your scoring model.

With today’s marketing technology, you can even score based on browsing actions a customer or prospect took before they provided an email address. Using a non-keyed database setup combined with Web tracking, you can create customer profiles and “listen” for behaviors, then connect these to a user’s profile – and score accordingly based on previous actions – when they provide an email address down the road.

Ideally, all these behaviors will flow into a centralized database. And that brings us to the second part of the behavioral data collection equation: building out your integrations. Deploy your APIs and connect your central marketing database with your CRM, e-commerce, Web analytics platforms, product catalogs and even support data. Once you start leveraging these other critical pieces of data, you can really fine-tune your scoring

model using the wealth of behavioral data at your fingertips.

A final word: While actions provide a foundation for your behavioral score, in the absence of context, they can be one-dimensional. That’s why savvy marketers also consider recency and frequency in their scoring mix.

Recency

Would you look at a prospect who viewed a product demo this morning the same way as one who did so six months ago? Or a customer who made a purchase and posted a review within the last month to someone who did so within the last year? Probably not – which is why good scoring models incorporate the concept of “recency.”

As its names suggest, recency refers to how recently a person took an action. Accounting for recency in your scoring model enables you to distinguish between behaviors that happened during a contact’s entire history and those that happened a short time ago. You can, for example, increase or decrease a contact’s score based on when he or she performed a certain action, which can enhance your model and make sure you’re taking advantage of the opportunities at hand. Consider the following scenarios:

- **Prospect getting hotter:** Bursts of activity can indicate a readiness to buy. If a prospect clicked through on a link in your email, viewed a specific product page on your site and watched your demo within the last week, that person may need to be bumped to “hot” status and routed to sales.

Negative Scoring

Scoring isn’t just about what someone does do. It’s about also what they don’t do – and how recently they’ve done it. Has a person not visited your website in the last two weeks? Failed to click on an email in the last month? Modern scoring systems look across behaviors and change scores based on inaction as well as action.

When building your scoring model, then, considering adding negative values or detractors for known undesirable traits – both demographic and behavioral. For instance, if a person falls into your key demographic but hasn’t opened any emails, that could be a red flag that he or she isn’t as good of a lead, so you might add a rule that reduces points for a contact who hasn’t open an email in “X” months or more.

- **Prospect getting colder:** Conversely, if a prospect performed those same three actions four months ago, keeping that contact in the “hot” category might result in unqualified leads going to sales. Decreasing the score by accounting for recency, though, would enable you to shift that person to a nurturing track designed to re-engage lukewarm prospects.

Every marketer knows that the quality of a lead or the engagement level of a customer changes over time. Incorporating recency into your scoring model will reflect this and help you deliver more relevant content.

Frequency

What about how often a contact performs an action? If a person visits your website five times in a month compared to another who does so once, what does that say about his propensity to buy compared to the other? It’s likely you wouldn’t want the person who’s been exploring your website a lot this past month to receive the same score as the person who visited just once.

The answer to this challenge is adding a “frequency” element — how often a person took an action— to your scoring model. Behaviors for which you may want to score based on frequency include form submissions, downloads, video plays, link clicks (from a website or email), email opens and Web page visits.

When used together, recency and frequency can help balance each other out to provide a more accurate behavioral score. For instance, rather than heaping new points on top of an old score when someone repeats an action, a model that takes recency into account will peel off an action’s points over time so a customer or prospect’s score isn’t artificially inflated.

Properly Weighting Your Model

A combination of demographic and behavioral contact information is the cornerstone of a powerful scoring methodology. No single attribute is effective in isolation. People give inaccurate details, and a person’s actions may not indicate what we think they do. Weighting (assigning point values) the various areas of demographics and behaviors against each other helps to balance scores and protect against inaccuracies.

How you weight your model will depend on your unique business situation. Here are seven steps to help:

- 1) Discuss the common signs for conversion and the degree of impact.** Have your designated scoring team brainstorm the different factors that can be indicative of lead or customer quality. Don’t worry too much about specific values for the factors at first — just get the major categories listed.
- 2) List the attributes in general order of importance.** For example, a B2B company might prioritize industry type over company size, while a B2C might rank gender higher than age.
- 3) Select a score range:** Determine what your minimum and maximum scores will be. The exact range isn’t critical, but give yourself enough slack to allow for a wide variety of scores. For example, if you have a scoring system that goes from 1 to 100, it may be difficult to show the diversity of lead quality within such a narrow range. A range of 1 to 500, on the other hand, will give you ample room for a variety of scores.



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“A combination of demographic and behavioral contact information is the cornerstone of a powerful scoring methodology”

4) Define possible attribute categories: List each value you'll use for scoring each attribute. For example, you might want to divide company size into three ranges: less than 100 employees, 100 to 500 employees, and more than 500 employees.

5) Assign scores to each attribute/value pair: Referencing the priority list you created, assign scores for each possible value of each attribute. You'll want to put some thought into these scores and consider how the scores you're assigning relate to the scores assigned for other items, thinking about both demographics and behaviors.

Say females are more likely to buy your product, and it appeals most strongly to individuals age 30 years old to 50 years old and living in the southeast. Furthermore, those that have visited your site in the past 14 days or opened and clicked an email in the past 7 days are more likely to buy. Your list might look something like this:

Visited the site in the past 14 days	+60 points
Subscriber is female	+50 points
Subscriber lives in GA, FL, LA, MS, AL, TN, SC, NC, VA	+50 points
Opened and clicked an email in the past 7 days	+40 points
Subscriber's age is between 30 and 50	+30 points

Ultimately, you can give each field whatever point value you'd like. Look at how many attributes you're including and determine first which is the most important and the least applicable. Make sure your most important is at least double the points of the least valuable. Where appropriate, consider incorporating negative scoring in your model as well (see sidebar for more on negative scoring).

6. Develop a category system: Start thinking about what buckets you might place contacts in and what

score levels might distinguish these buckets. For example, you might create "Hot," "Cold" and "Lukewarm" tiers (or whatever descriptions work for you). You can play with the values to determine what scores make the most sense.

7) Test your model: Once you've got the "first draft" of your model in place, try running some real-life examples of prospects or customers through the model you've created to see how they score. You can do this manually, using a spreadsheet to model your score. After you run a few test cases through the model, you'll likely find there are some adjustments you'll need to make. (Turn to p. 16 for an interactive Scoring Worksheet, Data Planner and Test Planner you can use for your own scoring purposes.)

ADDING AUTOMATION TO THE SCORING MIX

Scoring alone won't help you optimally nurture prospects, engage customers and drive revenue. The real excitement happens when you combine scoring with automation and think about what happens when people reach certain numbers. Will they be automatically routed to sales? Sent a triggered email with loyalty rewards? Added to an education-centric campaign? The answers to these questions will depend largely on what you're using scoring for.

Regardless of whether you're nurturing leads, re-engaging inactive customers or something entirely different, timing and relevance are critical. When you add automation to scoring, you inject a real-time element previously missing from scoring platforms.

Success Story: Tekstream

Tekstream, an Oracle Gold Partner, wanted to use Silverpop Engage's scoring capabilities to discover potential sales opportunities from a multitude of channels, including Web, social, landing pages, email programs and automated messages.

Tekstream developed buckets and then made up personas that loosely resembled potential customers and their behaviors. The buckets included "Web," "Landing page," "Social" and "Email." Within these buckets were personas and typical behaviors such as:

- "Sally, an IBM Exec, received business card and visited the website"
- "Marty, a technical architect looking for a job, saw a social post and registered for a Webinar"
- "John, opted-out"
- "Charles, a current customer, opened second email in Legacy program and clicked on our services video link"

Tekstream then weighted each behavior as it relates to how close the contact would be to a buying cycle and equalized that into a 1 to 100 score model.

"After this model was deployed, we instantly gained a 360-degree view of our prospects' behaviors and enabled an automated notification process that gave our sales reps the ability to proactively respond in real time," says Lee Somerhalder of Tekstream. "We've seen our pipeline expand significantly by understanding more about a buyer's needs and timeline. Instead of prospecting to leads that are out of the buying cycle, we're spending time on valuable leads."

Now, when a scoring threshold is crossed, automation can kick in immediately to act on the new level of interest or engagement, enabling you to deliver incredibly relevant, timely content.

Instead of sending content strictly on your timetable, you send it when each individual recipient performs an action that suggests they're ready for the content. In fact, you never actually hit "send" – you establish the rule sets, and marketing automation does the rest. As a result, efficiency and engagement soar.

Don't be afraid to think beyond email when strategizing about how you can use scoring to full advantage. You might consider, for example, using programs to route hot leads to your call center or sales team and deliver cold leads to your direct mail print house. Or you could use your scoring model to help customize Web content, targeted landing pages or unique pages within Facebook.

BEYOND RANKING LEADS: 5 WAYS TO USE SCORING

Traditionally, B2B marketers have used scoring to assess, rank and route leads according to their buying interest. And with good reason – a well-thought-out lead scoring system improves sales and marketing alignment, reduces time wasted on unqualified leads, speeds up the conversion process and increases ROI.

That's just the tip of the iceberg, though. Here are five other ways you can use scoring to build engagement and drive revenue.

1) Engagement Score: Ever wonder what customers are most connected with your business or brand? Set up

an "engagement score" model designed to provide customer and prospect analysis – and even tell you what contacts are most immersed in your brand within a specified time period.

Let's say you want to find the top 10 percent most engaged customers during the last month. You could, for example, build a scoring model that would award points based on whether contacts opened emails in the last 30 days, visited your website more than five times this month, and commented on a blog.

You could then segment the most highly engaged customers based on these aggregated behaviors and send them a specific offer – a special sale, an upsell offer, a unique incentive or an exclusive invite.

Or you could use engagement scores to refine offer targeting, splitting your database into three groups (e.g. gold, silver, bronze) and using these classifications to trigger specific mailings and insert dynamic content (e.g. custom headers or special offers).

2) Inactivity Score: Savvy marketers know that retaining customers is more efficient than adding new ones. So, set up an "early identification" scoring model that enables you to identify customers whose engagement level has fallen or is dropping – based on the behaviors key to your business – and automatically drop them into a re-engagement program once their score drops below a specific threshold.

You can design this unique messaging stream to jolt them from their inactivity by, for example,



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"Think beyond email when strategizing about scoring – use it to customize landing pages, Web content or Facebook pages"

using different types of content and offers, inviting them to update preference forms or fill out a survey, or asking them to engage via social media or switch their communication preference to other channels.

3) Loyalty Score: A good loyalty program can make your best customers even happier. Consider setting up a scoring system that helps discover customers who are highly engaged with you. Start by defining 10 to 15 trackable user actions that indicate deep interactions with your brand. Examples might include watching videos on your site, attending an event, redeeming an offer, sharing a piece of content to a social network, or checking in at your store.

You can then use automation to segment your most loyal customers — based on either task completion or overall score — and then send a unique offer to that group — special discounts, early-access shopping days, complimentary services, guided tours with the owner, invitations to exclusive events and more. Whether you run your loyalty program behind the scenes or make it public-facing, your customers will appreciate the privileges you bestow upon them as a result of their lofty status.

4) Profile Completeness Score: It's difficult to deliver personalized, relevant content without a strong database. So, set up a "profile completeness" score designed to identify who you need to gather data from. You might subtract 100 points for each contact for whom email is empty, first name is empty or last name is empty. Conversely, you could add additional points when you get premium pieces of information that you may want to use later on like a Twitter handle, physical address or phone number.

You might then set up your scoring model so that if a person's "profile completeness" score falls to a certain threshold, you'll omit that contact from certain marketing materials or sales attempts. Or, you might create a nurture campaign designed to fill in that data and drive people to give you information that you don't have — perhaps using progressive forms or inviting them to register via social sign-in.

5) Gaming Score: Gamification is a fantastic way to set you apart from the masses, engage customers and bring some fun to marketing. And using scoring is an easy way to run many of these fun contests and promotions. Just build a model that allows you to score your customers against each other based on how they're interacting with you, and you're off.

For example, you could run a "Be our #1 fan" promo that invites contacts to engage with your brand and collect points for visiting the site every day, reading and sharing any of your emails and commenting on your blog — with 100 bonus points for the contact's 5th comment.

Depending on your marketing technology platform, you could even create a landing page where you display these points to customers, reveal badges and rewards and offer the chance to redeem points for prizes.

REVISITING YOUR SCORING MODEL

Scoring is a flexible methodology. As you implement your system and evaluate scores, you

MULTIPLE SCORING MODELS

If you're looking to target contacts with specific interests, geographies, behaviors or loyalty levels, building multiple scoring models may be a good option. Having different scoring models potentially enables you to segment better and increase message relevance. Examples of multiple scoring models include:

1) One scoring model for each brand, service or product line: A prospect might be very interested in one product, but not have any need for another. Setting up different scoring models for different products enables you to take the guesswork out of which content and offers will appeal to a prospect while ensuring that a lack of need for one product doesn't negatively affect a person's score and cause you to overlook a potential brand advocate (or enthusiastic fan).

2) One scoring model for prospects, and another for customers: Whether a person is a prospect or a customer may make a difference in how they interact with you and what behaviors indicate engagement. Setting up different scoring models for each can thus help you evaluate and connect with each segment more strongly, whether your goal is scoring a first sale or building customer loyalty.

3) One behavior-only model, and another that's all-encompassing. Whether you're concerned about prospects falsely filling out forms or you want to develop a campaign that's strictly behavior-based, stripping demographic and firmographic data out of the score can help provide new insights.

may discover that some of your initial assumptions were incorrect. For example, you might find that a high-level technology executive is more apt to buy your product than a technology manager, or that socially sharing content is more indicative of a high level of engagement than multiple visits to your website.

Revisit your scoring model periodically – perhaps once a quarter – and see if you notice any outliers. Being able to fine-tune your scoring model improves accuracy, ultimately resulting in increased revenue.

Your scoring model can also give you valuable insights into your prospects and customers. You may discover, for example, that when prospects hit a certain score, there's a 60 percent likelihood they'll move to the next stage in the buying cycle within 30 days. Or that your most loyal customers are 75 percent more likely to share content than the rest of your contacts.

You can then use this information to decide what communications and content you can use to connect more strongly with your contacts.



Inside Silverpop's Scoring Model

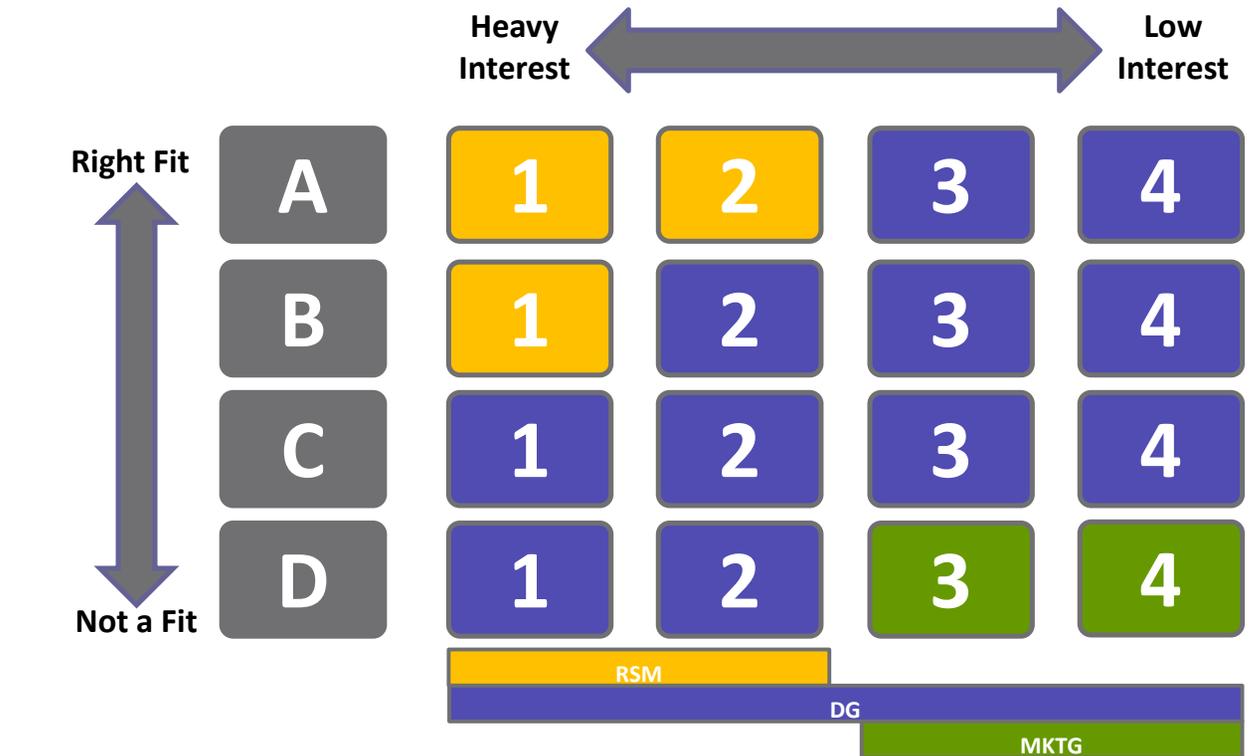


As marketing operations and analytics manager, Talibah Mbonisi oversees Silverpop's scoring system. In this Q&A, she discusses how Silverpop goes about creating and updating its scoring model, as well as what the future holds for Silverpop scoring.

1) Why did Silverpop decide to update its lead scoring model?

Two primary factors drove our decision to update the model. First, our business processes changed. The organization decided that some leads should flow directly to sales reps, bypassing our lead qualification team, and that not every lead warranted an immediate call, even from the lead qual team. So, we had to determine how to best identify which leads should go to which team, when and why. This new lead management process was informed heavily by the SiriusDecisions Demand Waterfall framework.

Secondly, our initial model didn't really give us any insight into the question of "why" we were treating the prospect one way or another. It didn't take behavior into account to the degree that we believe behavior should impact how we interact with a prospect. For instance, it didn't differentiate clearly enough between profile (e.g., this prospect fits our target demographically) and engagement (e.g., some indication of interest or stage in the buying cycle)



We wanted better differentiation to be able to say, "Yes, this is someone we want to interact with based upon their profile, and it looks like they might want to interact with us based upon their behavior — both online and offline. Our model ended up being matrixed, going from one score and rank to a matrix of rankings from A₁ (A=profile rank; 1=behavior rank) to D₄, with each combination driving a specific lead assignment route and/or touch from one of our teams.

2) Who was involved in the process?

The actual definition of the criteria was a joint effort between sales and marketing. It was and continues to be an iterative process. Because we didn't have tons of easy-to-digest data to help us come up with a scientific model, we started like many other organizations: by using the subjective experience and insight of key stakeholders. We asked different members of our sales and lead qual

teams to list and then rank the factors that they saw as key indicators. And, likewise, we asked experts in our marketing organization to do the same. We performed this hierarchical ranking process several times to get to the initial criteria and weighting.

In addition to those folks, we benefitted from the participation of our product experts, who served as consultants on realizing our vision within Engage.

3) What areas required the most compromise between sales and marketing?

We had to negotiate and agree upon everything, including what the actual categories were and how they were weighted. For example, should engaging with us via a demo matter more or less than attending a Silverpop event? And then, is every demo equal, or do we believe that one format is a better indicator than another?

Eventually, we believe the data will help us answer these questions more reliably, but the process that got us here was definitely one that both required and facilitated sales and marketing getting on the same page.

4) What criteria does Silverpop consider when deciding where a prospect is in the buying cycle?

Some of our behavioral criteria include:

- **Downloads:** White papers, Webinars, etc. Different types of downloads may weigh more heavily
- **Participation in live and virtual events:** Again, different weighting depending upon the type of event
- **The degree to which the prospect engaged with us at an event:** Did we have a high quality conversation with the prospect in a tradeshow booth, or did we just swipe his or her badge?

There are also some behaviors that we don't build into the scoring model but use to expedite getting the prospect in touch with a rep. So, for example, if you complete our "Contact Me" form, score doesn't matter, you're going to be contacted. Also, beyond behaviors, we also take into account profile data.

5) What's next for Silverpop in terms of lead scoring and nurturing?

There's so much on the horizon. We'll factor recency and frequency into the model more, for example. We're planning to let the data guide us more, moving away from our assumptions and opinions toward a more predictive model. And, we'll utilize scoring deeper in the buying cycle. Today, scoring is used primarily to get a new prospect to the right team at the right time. But, we'll be using it more this year to identify prospects who weren't ready to take the relationship further when we first connected with them, but who may have some new compelling reason to talk to us again.

Sample Silverpop Scoring Scenarios



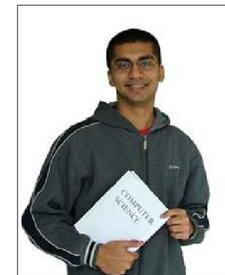
- VP of Marketing
- Advertising Agency
- Visits Booth
- F2F Demo with Rep

Lead Score: A1



- Marketing Manager
- Retail Industry
- Downloads White Paper

Lead Score: B4



- Student
- Views recorded demo
- Downloads White Paper

Lead Score: D3

CONCLUSION: THE FUTURE OF SCORING

Every company wants to communicate to each of its customers individually. And in today's increasingly buyer-empowered world, more relevant communications are becoming critical to boosting engagement and revenue. But when you're already juggling general broadcast messages such as newsletters, event promotions and sales notifications – or even sending to large segments – making the leap to reaching out on a more personal level can seem daunting.

Scoring is one way to close the gap between the traditional world of large audiences and the future of individualized conversations. You can start out with the

basics and use scores to segment your customers, or you can move to the next level and use them to drive dynamic content, serving up articles and offers that reflect the precise score level for each customer. You can even use automation to launch a message or sequence of messages in real time when a customer's score reaches a certain threshold.

Expect the future to bring even more innovative scoring capabilities, as technology evolves to enable the capturing of additional behaviors across mobile, social and even offline channels. That's exciting news for marketers who understand that engaging today's sophisticated buyers requires generating more automated "campaigns of one" in which you speak to each individual on his or her terms.

Footnotes

1-Aberdeen Group, "Marketing Lead Management: From the Top of the Funnel to the Top Line"

Silverpop's digital marketing automation platform was designed to make it simple to build hyper-personalized campaigns, creating individualized experiences for every relationship. [Watch our demo](#) to see our product in action, and [contact Silverpop](#) to see how we can help you accomplish your marketing goals for 2013.



SCORING WORKSHEET

1) What are your goals for scoring? _____

2) Who will use the scores? _____

3) How will each party use the scores?

- Marketing (e.g. nurture programs, inactive programs)

- Sales reps (e.g. prioritize opportunities)

- Managers (e.g. lead compliance)

- Executives (e.g. resource balancing)

4) What score bands or ranges will you use? Examples include "A/B/C/D," "Hot/Medium/Cold," "Tier 1/2/3," "0-30, 31-50, 51-70, 71-100."

5) What are the primary data elements you'll use in your scoring model? Fill out the rows in the Scoring Data Planner grid on the next page. (Rows = scoring data elements, columns = data type.)

Example:

Data Element	Demographic Data	Behavioral Data	Appended Data
Industry			
Clicked on email within last 30 days			

6) Where will this data reside? Use the Scoring Data Planner to organize your score strategy. Mark columns with an "X" if you're collecting the data today, and mark with an "O" if you need to collect or acquire this data.

Example:

Data Element	Demographic Data	Behavioral Data	Appended Data
Industry	X		O
Clicked on email within last 30 days		X	

7) What "values" will you include for each data element, and what points will you assign to the values?

Place these values on the Scoring Data Planner. Don't forget that you can assign negative points to certain values or behaviors.

Example:

Data Element	Demographic Data	Behavioral Data	Appended Data	Data Value	Point Value
Industry	X		O	Manufacturing or Mfg	+20
Clicked on email within last 30 days		X			+40

8) What happens when scores reach a certain band, range or score threshold? For example, "If score is C, then place in an automated nurture program."

9) Test at least five to 10 scenarios using the Score Test Planner. For each contact, review the demographic and behavioral data and assign the points as if your scoring model were live. Evaluate whether the routing actions and process steps achieve the desired results. If not, adjust the point values and rerun your test on all the scenarios.

