The background of the cover is a dark blue gradient with several interlocking puzzle pieces. One piece in the center is a bright orange color and features a white dotted line that forms a stylized human figure. Other puzzle pieces are in shades of blue and green.

The **Intentional** Lead Scoring Workbook

bombora

Leads are a double-edged sword.

Yep. You read that right.

While most blogs, articles, and consultants tell you that lead collection is critical for your business to survive (and it is), there's also a dark side to collecting leads that's not often discussed:

Leads can be an incredible waste of time if they're not genuinely qualified or in-market for your product or service.

Despite our best hopes, not everyone who downloads an eBook or registers for a webinar is fully interested or able to buy your product or service, and passing all of these leads through to sales can easily overwhelm them, leading to burnout or distrust of future leads.

At its worst, all of this extra activity can distract sales from the accounts and leads who are most likely to convert, which can directly impact your bottom line.

How lead scoring works



When a prospect takes a sales or marketing action in a brand's customer journey, they earn points.



Each event or action has a pre-set point value.



Once a prospect reaches a specific value, that prospect is typically labelled as one of the below categories.

SUBSCRIBER

LEAD

SQL

SQL

OPPORTUNITY

CUSTOMER

All leads aren't created equal.

It's clear that we need a method to determine which leads are most likely to buy, so we don't spend all of our time on customers who are just window shopping. That's where **lead scoring** comes in.

At its most basic level, lead scoring is the practice of assigning a score to each lead to help define its priority over other leads and to determine when the lead is ready to be contacted by sales. While it may sound overly simplistic, lead scoring can offer huge benefits to sales teams.

With a quality lead scoring process, sales can:

- ❏ Tell at a glance which leads have the highest level of interest (without having to compile dozens of data points from different sources).
- ❏ Get a more informed view of how a particular lead has interacted with the business and the actions that they've taken so far.
- ❏ Align better with marketing on a clear definition of when a lead is qualified and ready to be passed off from marketing to sales.
- ❏ Better personalize and meet customers where they are based on their demonstrated level of interest.

Despite the many benefits for sales, lead scoring is often seen as purely a marketing function (after all, it's built into most major marketing automation platforms like [HubSpot](#) and [Marketo](#)), but developing your lead scoring rubric in a vacuum apart from sales can be a recipe for failure.

Sales will have to work with the output of the lead scoring model, so it's important that they contribute to the logic that makes the model work effectively.

How to use Sales for efficient lead filtering

Your salespeople have gained a wealth of knowledge and experience from seeing deals close firsthand; therefore, their participation in helping you set up your lead scoring model will ensure it's accounting for all of those sales insights and best practices you can only learn from the field.

To encourage cooperation and reduce friction, you need to ask good questions and frame them in a way that sales will understand and see the benefit in answering.

Here are a few examples of effective, sales-focused questions:

1. From your experience, which actions taken by prospects lead to the best meetings?

2. Have you noticed any trends in specific prospect activity that often lead to less productive/"I'm not ready yet" conversations?

Lack of budget

Misplaced authority

Unsure of product/service needs

Uncertain timeline for transaction urgency

Other: _____

3. Have you found that prospects from specific industries or company structures are quicker to hop on a call than others?

Yes

No

Not enough information to respond



Open your worksheet to get started!



Fill in your personalized responses

Let's build an effective lead scoring system!

This workbook will walk you through the four critical steps you need to build a comprehensive lead scoring model that will keep your sales team happy and your pipeline full of engaged leads!

Let's go!

Ready to get started with your lead scoring program?

Use this worksheet template



Lead Scoring Step 1: Explicit scoring with demographic and firmographic data

Your product or service isn't a perfect fit for everyone—and this is a good thing.

This means, without much effort, you can easily categorize leads based on how well they align with your ideal customer's demographic and firmographic attributes.



Demographic data

includes personal customer attributes such as title, role, purchasing authority, number of direct reports, and years in current position.



Firmographic data

consists of business attributes such as geographic region, type of organization, industry, technologies used, number of employees, and revenue.

For this first step, work with sales to determine the most critical demographic and firmographic data that coincides with your ideal customer profile (ICP) and then assign scoring related to the magnitude of each of those key attributes.

Working at the account level? No sweat! Lead scoring is also effective in account-based strategies.

With this data in hand, you're already one big step closer to sparing sales from unqualified leads and delivering leads with a higher probability of conversion!

Do you have all the right pieces?

Here's a great starting point to begin your explicit scoring activity.



Explicit data checklist

Key individual—specific demographic data

- Title
- Role
- Purchasing authority
- Level of seniority
- Industry of expertise
- Years at current position
- Designations/certifications
- Social network participation
- Public recommendations
- Affiliations—groups and associations
- Career interests
- Personal interests associations

Key company—specific firmographic data

- Number of employees
- Company revenue
- Revenue growth (growing declining)
- Rankings
- Number of products sold or subscribers
- Location
- Headquarters or satellite
- Web traffic
- Year founded
- Organizational structure
- Geographic market served
- Competitors
- Partners
- Fiscal year end
- Industry

Lead Scoring Step 2: Implicit scoring with first-party Intent data

Ok, now we can rank our leads based on how well they fit the right demographic and firmographic attributes, but this doesn't tell us anything about their actual level of interest.

This is where your Implicit (or first-party Intent) data comes in.

First-party Intent data includes the actions that your lead takes that you can directly measure from your own MAP and integrations.

Examples of these actions include:

Content conversions (e.g. eBook and industry report downloads)

Webinar/event registrations

Free trial registrations

Email opens and clicks

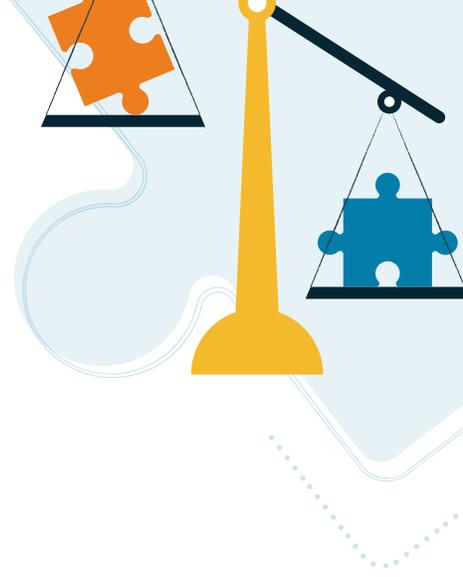
Page views

Chatbot conversations

Social media engagement

Hand raisers (e.g. contact us and demo request form submissions)

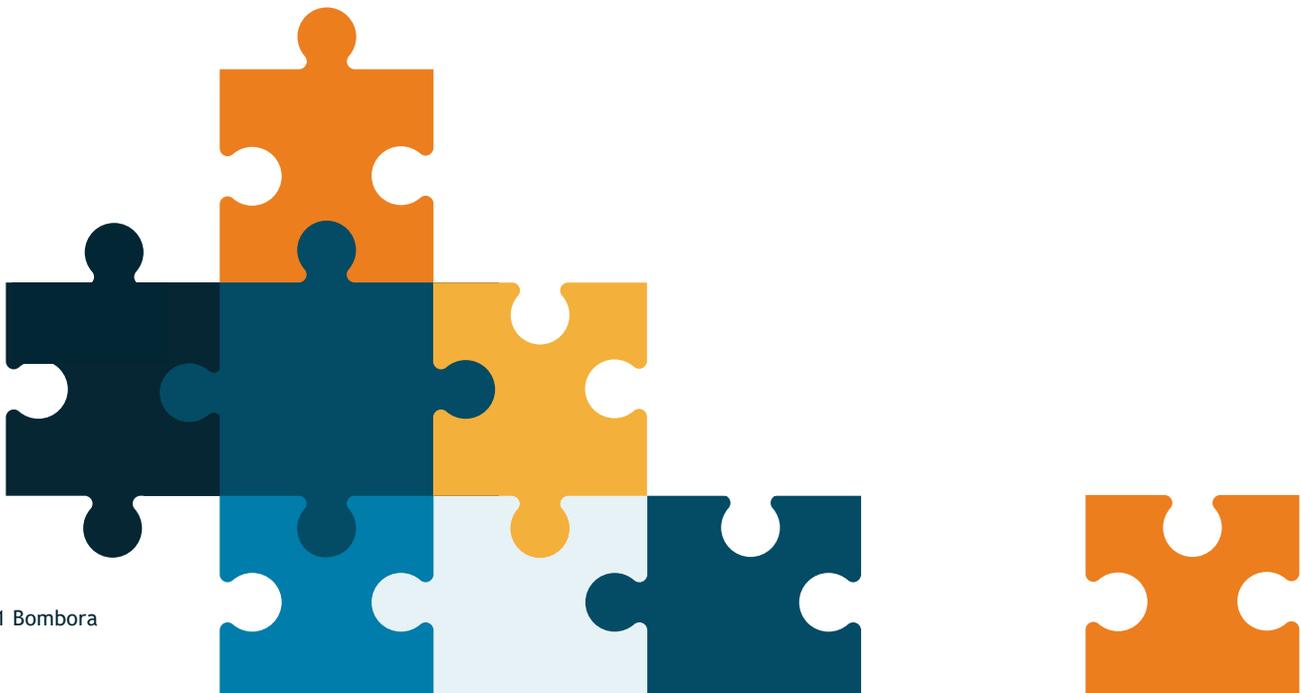
- ✓ Use different scoring tiers to award more points to **eBooks, webinars, and other content** directly relevant to your business/product, and fewer points to more generic or “industry-related” content.
- ✓ Don't award singular **email opens and clicks** too heavily. Someone may open an email or two but still not be highly interested—Wait until a lead has reached a higher frequency of opens and clicks (i.e. 5+) before assigning a slightly higher score.
 - Opens are more passive than clicks, so weigh each action accordingly.



Passively looking at a webpage shows less interest than watching a webinar or signing up for a product demo, so it's important that you weigh your scoring relative to the level of interest each action demonstrates.

As an example, the table below compares actions with lower, passive interest to those with higher, active interest for several content types:

- ❑ Not all **page views** are created equally, so don't rate every page view the same. Assign more points for views of specific product or pricing pages and for the number of page views per lead.
- ❑ Don't forget **social media!** Award points to leads if they follow your organization on social (especially if they're following on multiple channels) and if they're actively engaging with your posts and content (e.g. comments, likes, shares).
- ❑ The greatest amount of points should be applied for **direct requests for contact and demos.**



Lead Scoring Step 3: Comprehensive scoring with third-party Intent data

Rarely does one person make an important corporate purchase by him or herself. In fact, Gartner research has found that [“the typical buying group for a complex B2B solution involves 6 to 10 decision-makers.”](#) and this number has been increasing year over year.

While there will most likely be several people on the buying committee, with each role needing their own individual messaging, only one of them may score high enough to break through the MQL barrier—leaving the rest to be ignored.

Incorporating Intent data into your lead scoring model will help ensure that you capture all of the members of the buying committee at any particular account, and you can implement it in 2 easy steps:

1. *Note which accounts are most actively researching your organization, product, competitors, and/or topic clusters on your Bombora Company Surge® report.*

2. *Boost leads from the above accounts with enough points to surface them to sales.*

Combined research activity across an entire account is something you *can't* afford to miss, as a spike in research activity from a potential prospect is a very solid buying sign.

Check out this pre-filled example

Scoring attribute	Score	Examples
Bombora Intent Data Score		
Intent data topic cluster-Company name	150	Accounts with a Company Surge® on your company
Intent data topic cluster-Product/solution	100	Accounts with a Company Surge® in your topic cluster (3+ topics)
Intent data topic cluster-Competitors	60	Accounts with a Company Surge® in your competitors topic cluster (1+ competitor)

Name 3 topics, verticals, industries or categories your best customers are in

Scoring attribute	Score	Examples

Fill in who your main competitors are

Curious about how Bombora's Co-op is filled with only privacy-compliant Intent data? Here's how:

Active intent signals

Bombora's Intent data is gathered from the B2B ecosystem across multiple content sources



Real world B2B activity

Making the scale of this Intent data unparalleled—globally



Ethically-sourced Intent data

It is used to produce Company Surge® data



*Figures for Q2 2021 (average of monthly figures from April to June)

Lead Scoring Step 4: Implement score decay and negative scoring

Un-qualify leads? Are you serious?

Yep. Situations change, buying windows close, and even the best leads can become ineffective over time. When it comes to keeping your leads clean, maintaining a pile of stale leads in the system can be just as bad as if you didn't score them at all.

In addition to deducting points for leads who don't meet the demographic and firmographic data, implementing score decay over time can help ensure you're delivering your MQLs to sales while they're still fresh.

Here are a few situations for which you should score negatively or implement score decay:

Deduct points for any prospects who don't align with the firmographic or demographic data of your Ideal Customer Profile (e.g. remove points if the account is in an industry you can't or don't want to sell to)

Remove the associated points for attending a webinar or downloading an eBook after 30-60 days, as this lead has probably cooled down

If individuals opt out of outreach/sales enablement sequences, this is a definite sign to remove significant points (You may also want to deduct some points if leads opt-out of marketing emails)

If sales are able to disqualify a lead in your system, ensure that this is reflected with a large point deduction as well

Remove points for entry-level job titles if they're not part of your ICP

Deduct points for associated leads 20-30 days after their account stops showing high intent signals

Check out
this pre-filled
example



Point Deductions		
Provided a Free Personal Email Address	-15	
Undesirable department	-10	Engineering, Sales
Marked as disqualification	-100	
Undesirable region	-15	Europe
Undesirable company size	-15	< 50 employees

Now it's your
turn!



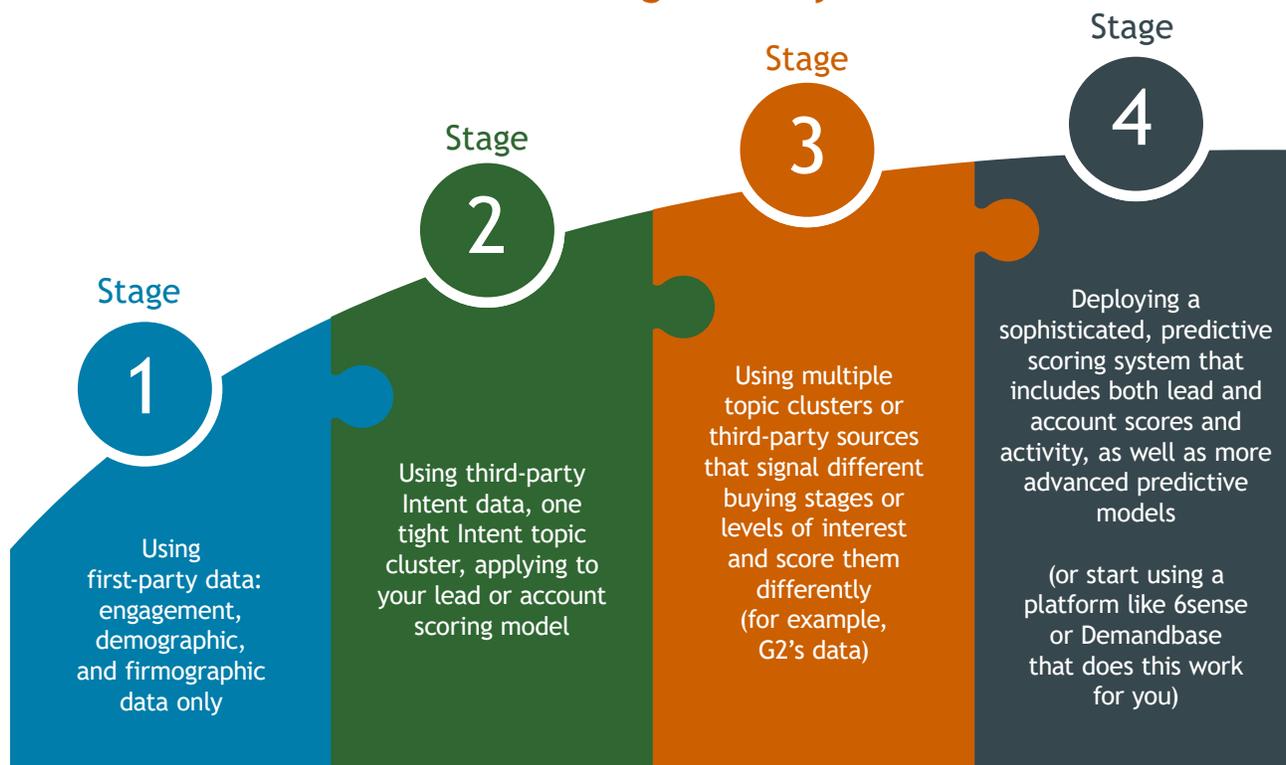
Point Deductions		

The bottom line is that the level of interest of your leads changes over time, so your lead scoring system needs to reflect this as well.

Removing stale leads is the best way to ensure your sales teams are spending their limited time most effectively—approaching the leads who are most active and most likely to convert.

Regardless of how much data you have access to, it's great to be proactive in building your lead scoring model! If you're only set up to reach step 1 or step 2 with your current stack, no worries! Revisiting your lead scoring model is essential to building and optimizing your program. Working your way through each stage is essential to an effective lead scoring model, and the best of us haven't started at stage 4!

The lead scoring maturity curve



Curious about proven lead scoring results with Intent data?



CLIENT CHALLENGE	DESIRED LEAD EVENT	PERFORMANCE
<p>Turtl</p> <p>Turtl needed to create and expand their SDR call lists based on data-backed insights versus anecdotal sales feedback.</p>	<p>Booking a meeting with the SDR team</p>	<p>After only four months of using Company Surge® for HubSpot, Turtl booked over 40 sales meetings and increased its meeting creation rate by more than 300%.</p> <p>Learn more</p>
<p>snowflake</p> <p>Snowflake identified the need for Intent-backed insights to prioritize high fit accounts with the right value propositions to execute its personalized ABM plan.</p>	<p>Increase in research activity for several Intent topics identified for further analysis by an internal ABM pod</p>	<p>The ABM pod identified a target account that showed a significant increase in research activity and through coordinated marketing and sales outreach, the prospect engaged with Snowflake's AE team which led to a new deal closing in 3 months.</p> <p>Get results like this</p>
<p>kazoo</p> <p>Kazoo's legacy proprietary fit model, failed to show an increase in conversion rates for high scoring accounts compared to lower scoring accounts.</p>	<p>Qualified email responses</p>	<p>When Kazoo used Company Surge® scores as a prioritization mechanism, they saw 2-3x reply rates compared to not using the data.</p> <p>Read the full story</p>



BONUS Lead Scoring Step 5: **Periodic auditing and optimization**

Following the previous four steps will ensure you have a solid starting point for your lead scoring model, but it's nearly impossible to get your model 100% tuned on the first try. We'd be remiss if we didn't mention the importance of periodic audits and optimization of your model.

Maybe you get access to new or more sophisticated data?

Maybe you want to add new content buckets or your ICP has changed?

Or maybe sales has just noticed that the leads just aren't up to snuff?

You should proactively set up meetings at regular intervals to assess the output of your model so you can make any necessary changes to ensure it's still delivering the quality leads you expect.

Bringing it all together

We've come a long way from where we started—

In this workbook, we've helped demonstrate the importance of and methods for:

1. *Vetting leads against the firmographic and demographic data of our target customers*
2. *Implementing weighted scoring from the direct actions our customers are taking with our content*
3. *Surfacing whole buying committee by cross-referencing Intent data with our raw lead data, and*
4. *Removing stale leads after their window of interest has faded.*
5. *Given you a lead scoring worksheet to get started on your lead scoring journey!*

...but now the real work of talking to sales and determining the right scores for each action begins.





Bombora tells businesses which accounts are researching their products and services. With this understanding, sales and marketing teams can be more relevant and consistent and improve performance across all activities. This Intent-driven approach revolutionizes the way businesses market and sell to other businesses through transparent data built on an ecosystem of quality, collaboration and innovation. With direct integrations with dozens of leading data and media-buying platforms, Bombora is building a world in which business buyers value sales and marketing for its relevance, timeliness and accuracy. To learn more, visit bombora.com.

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