Marketo Engage

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Grow, scale, and win with lead scoring.

Learn how to build a lead-scoring model that evolves with your business and supports rapid growth.

The primary responsibility of a marketing team at most B2B companies is to generate new leads and hand them off to sales. In a small organization with a single marketing team and only a handful of sales reps and business development representatives (BDRs), it's pretty easy to measure performance and identify what's bringing in the best leads.

But as your business grows, the process of qualifying new leads can become more complex and challenging. When you have multiple marketing teams dedicated to different regions and products, they may use different approaches and tactics to qualify leads. It becomes hard to know which marketing efforts are delivering the most profitable leads—and thus difficult to plan your next campaigns confidently.

The key to generating better leads and clearer data is a standardized lead-scoring model that's accepted by all your stakeholders. This brief covers three tips for getting started.

Tip #1: Don't do it alone.

Defining the key characteristics of a qualified lead should be a team activity. While marketing may lead the way, it's important to consult stakeholders from sales and sales operations, business development, and customer success as well. By combining insights from all these teams, you can zero in on the attributes of highly qualified leads. These may include:

- Ideal customer profiles (ICPs)
- Behaviors like general activity and program status changes (the prospect signs up for emails, opens email, clicks on a web page, joins a forum, etc.)
- Demographics
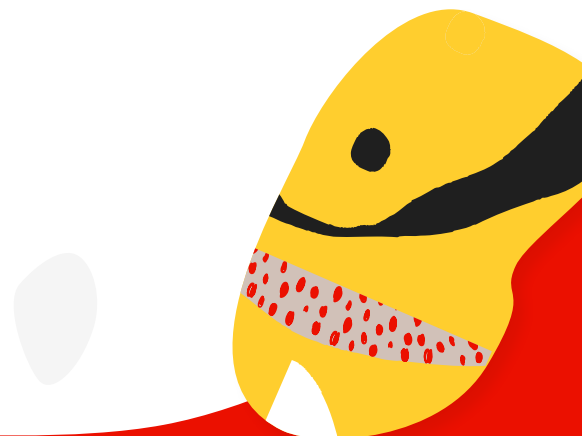
Tip #2: Plan for continuous feedback.

No lead-scoring model you create will be perfect. For example, your model may fail to qualify enough leads, or it may identify leads who aren't ready to engage with sales. To continually improve your lead-scoring model, you'll need to get frequent and honest feedback from your sales leaders, from the sales reps and BDRs who work with your individual leads, and from your marketing teams.

Ask sales leaders about trends.

Ideally, you should have regular conversations with your sales leadership. They can provide high-level feedback on lead quality and quantity that may inform your lead-scoring model's evolution. At the same time, sales can learn about the obstacles you face and the strategies and tactics you're using to improve lead flow.

Ask sales reps and BDRs about individual leads.

Individual sales reps and BDRs often provide feedback on the individual leads qualified by your scoring model—but in order for that feedback to be valuable, it must be specific. Comments like "this lead wasn't really qualified" won't help anyone or improve the process.

The best way to get specific feedback from BDRs and sales reps is to make the process as easy as possible. One way to do this is to offer an online form that allows them to choose from a list of specific reasons why they are returning leads to marketing.

Ask marketing if they're able to meet their goals.

Marketers can often become frustrated if they feel the company's lead-scoring model doesn't allow them to qualify enough leads. In some cases, if they believe they have no other way of addressing the challenge, they may ignore the scoring model altogether and simply pass partially qualified leads on to sales. That action goes on to frustrate sales, continuing the dysfunctional cycle.

Providing a clear, simple way for marketers to offer feedback on the scoring model can help avoid this outcome. Make it clear that everyone must use the same lead-scoring method—with possible targeted exceptions for different regions and product lines—and define a clear process for raising concerns, ideally with a designated governance team.

Tip #3: Establish governance for reviewing and changing your lead-scoring model.

It is important that no individual or single team make unilateral changes to your lead-scoring model or disregard it, even if they are having problems. But it's just as critical that your model be regularly updated—especially when it isn't working well for everyone. One way to ensure your scoring model can evolve without adding chaos to the process is to establish a governance committee.

Your governance committee will oversee periodic reviews of your lead-scoring model to make updates. This committee—which should include representatives from marketing, marketing operations, and sales—should meet regularly to review the lead-scoring model's performance and consider proposed changes to the model. Clearly define and communicate processes for stakeholders to report urgent issues, and for how the committee will address them.

Tip #4: Make sure everyone knows how the lead-scoring model and related processes work.

Once you have a lead-scoring model that your stakeholders have approved, it's important to make sure everyone knows how to use it. Both sales teams and marketers should be trained on your model and related processes.

For sales teams, you should be able to answer basic questions like these:

- "We always get great leads from Joe. What will happen under the new lead-scoring model?"
- "Will your new lead-scoring model make it harder for us to get enough leads to meet our targets?"
- "How will the re-qualifying process work after we recycle a lead?"
- "What can we do if we aren't getting enough leads—or if the leads we get aren't really qualified?"

For marketers, you should be able to answer questions like these:

- "Why can't we keep using our existing scoring methods?"
- "What can we do if the new scoring model doesn't let us qualify enough leads?"
- "How will we determine if the new scoring model is adding value or needs to be improved?"
- "How can we propose changes to the scoring model?"

Take the next step.

A unified lead-scoring model can help your marketing and sales teams make a successful transition from small company to larger organization. When you continually evolve your lead-scoring model and use your lead scores to inform marketing strategies, you can deliver more effective campaigns and set the stage for even faster growth.

Want to learn more about what effective lead scoring can do for your business? Check out the following resource:

Future Proof: How to Create a Lead Scoring Model That Scales (on-demand webinar)

Lead Scoring Cheat Sheet

Definitive Guide to Lead Scoring