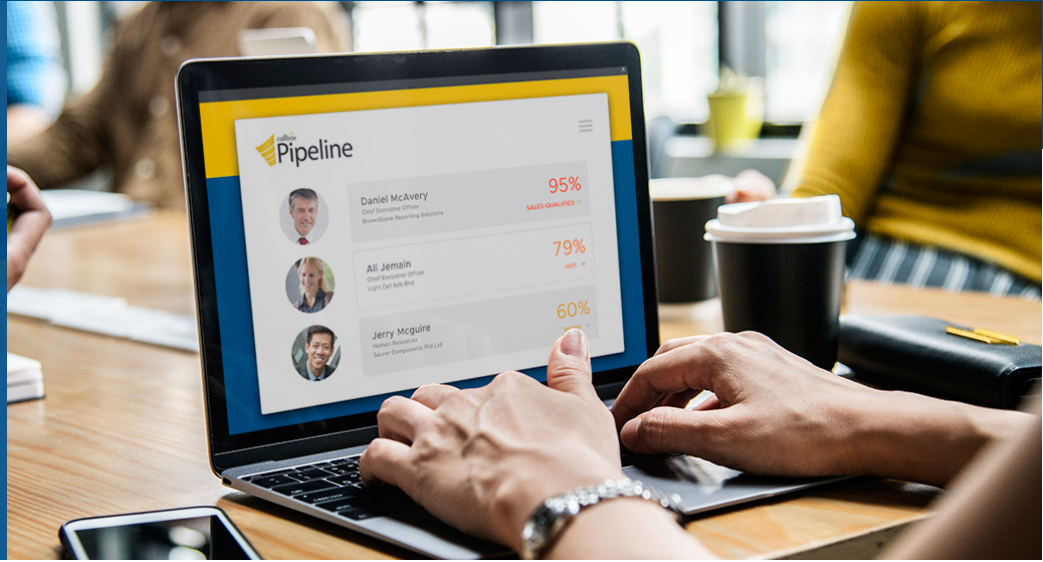


The Callbox Guide to

Lead Scoring



So what is this Lead Scoring you speak about?

Lead scoring is a process of ranking leads by level of interest and sales-readiness as based on a methodology agreed upon by both marketing and sales, or more specifically, by both you and Callbox. Leads are scored based on how they fit in with your business, the interest they show in your product or service and their position in the buying cycle.

Leads can be scored in a number of ways: by assigning points, by ranking or by labeling them as “hot,” “warm,” or “cold.” Whichever method is used, lead scoring incorporates a combination of demographic attributes; lead source and offer; authority, need, budget, and timeline considerations; completeness of data profile; and behavioral attributes, including frequency and recency.

Why would I need it?

As you very well know, all leads are not created equal. As they come in, they will be at different points in the buying cycle, some more ready to buy than others. With scoring information, unqualified leads are weeded out allowing sales reps to focus on only the best marketing leads. Lead scoring effectively drives marketing and sales productivity, resulting to increased revenue.

Our Lead Scoring Techniques

- We align marketing & sales in profiling an “ideal” customer and defining what qualifies as a “sales-ready” lead
- We employ a lead scoring methodology to rank leads (assigning of points)
- We assign initial lead scores based on demographic attributes as well as authority, need, budget and timeline factors
- We assign additional lead scores according to behavioral attributes
- We explore multiple scoring to gain greater insight into a lead’s level of interest in different products or campaign

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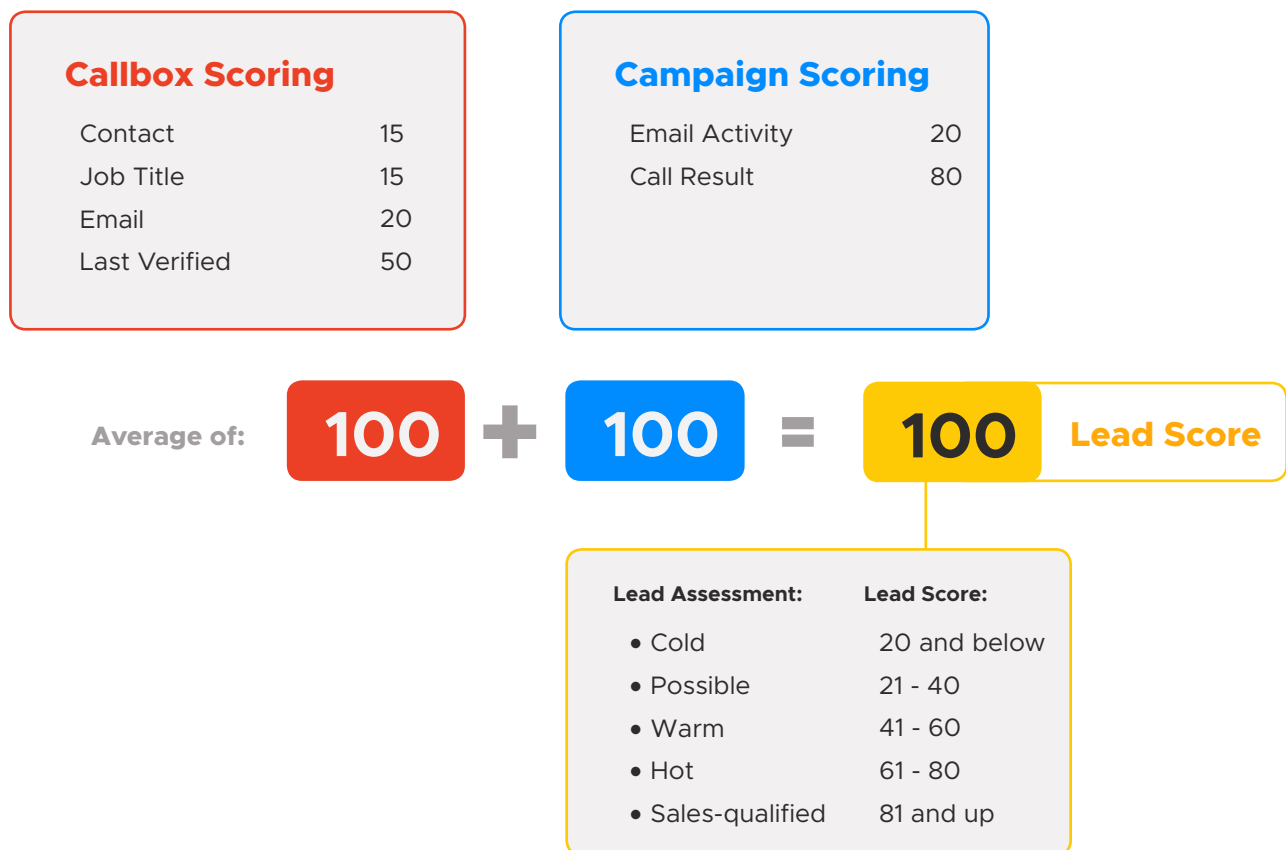
A solid lead scoring approach not only helps to rank prospects against one another, but can smooth out the lead flow and serve as the baseline for building a range of business rules that include ownership, role and activities.

— SiriusDecisions, What’s the Score

Callbox and Campaign Scoring

Callbox Scoring is the scoring of leads based on criteria such as job title, industry and location. Callbox Scoring helps you prioritize leads based on their similarity to other past won opportunities. Take for instance you only sell to companies located in California and with over \$500 million per year in revenues. Callbox scoring can help you identify the leads that match this criteria and give your sales team a quick look at which leads they should talk to.

Campaign Scoring is not a way to determine if a lead can purchase your product or service, but rather whether they likely will purchase, based on how engaged they are with your marketing.



Tips to Optimize Lead Scoring

1. Review scores of both successful and unsuccessful transactions. Were their scores reflective of the outcome of the sales process?
2. For those top prospects that had high scores but did not convert into sales, review if scoring could be improved so that they do not end up appearing a top priority so the sales team could avoid investing their time and effort with such prospects.
3. Look at scores by demographic segments like city or state, position, and company to determine if demographic scoring is skewing the scoring results.
4. Look at email/online behaviors to see if the actions of your top prospects are reflected in their scores.



REMEMBER THESE

Whose job is it?

Lead scoring is NOT the sole responsibility of the marketing department. Input from the sales team is invaluable in defining a “qualified” lead.

What is it for?

Lead scoring is NOT carried out only for the purpose of filtering the hot leads and casting aside the not-so-hot ones. Ultimately, you score leads to see which leads are ready to be forwarded to sales and which ones need a little more care and attention by marketing until they become ready for sales.

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