

# Lead Scoring Quick-Start

## 4 STEPS TO IMPLEMENTING A NEW LEAD SCORING APPROACH

Before implementing lead scoring, some key steps and decision points must be addressed by both sales and marketing. Taking the time up front to evaluate the “big picture” of a lead scoring approach helps teams better prioritize their resources, preventing cost overruns and unnecessary maintenance work down the road.

### 1 Establish Goals

Lead scoring should never be used in a vacuum. All lead scoring approaches should be developed in service of a measurable end goal. Establishing clear goals before implementing a scoring approach is a proactive step companies can take to optimize their scoring results.

### 2 Include Scoring Rules from the Outset of a Campaign

It’s much easier to implement lead scoring at the beginning of a campaign than it is to add it in the middle of one. When done at the outset, marketing and sales can jointly establish a scoring approach.

With lead scoring rules for a campaign in place at launch, there opens an opportunity to use initial campaign data and sales results to refine scoring to drive higher conversion rates, faster sales cycles and more.

### 3 “Just Start”

The most important part of implementing a lead scoring approach is just starting. Implementing scoring rules, establishing baseline metrics and measuring results is the only way to make a lead scoring approach work. Companies can’t know the value of lead scoring until they see it in action.

### 4 Plan on a Process of Refinement and Optimization

All lead scoring approaches have to start somewhere, and no approach is going to be perfect on day one. It’s important for marketing and sales teams to be prepared for a process of refinement and optimization from the outset of a campaign. This way, they can better establish timelines and collaboration processes for optimizing their scoring approach down the road. Start by reviewing your lead scores on a monthly or quarterly basis and adjusting the frequency as necessary.

The only way for a company to know if lead scoring is a viable approach for their marketing strategy is to perform the right due diligence. Lead scoring may not provide value to every company, but taking the time to consider how its implementation will drive marketing and sales results certainly will.