REVBLACK PLAYBOOK SERIES

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LEAD SCORING & GRADING

A guide to implementing behavioral and fit-based lead scoring — helping sales prioritize the right prospects and marketing refine what drives high-quality pipeline.

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INTRODUCTION TO THE PROJECT

DESCRIPTION

A **lead score** is a numerical value stored on Lead/Contact or Account/Company objects indicating a prospect's likelihood to become a customer, based on engagement actions like email opens or page views. A **lead grade** is a letter rating (A–F) for fit — based on demographics, firmographics, and technographics — assessing how well the prospect aligns with your ICP.

The lead score quantifies **behavioral intent**, showing how engaged they are with your content or reps. A lead grade shows how good of a fit they are for your product. A **combination score** can weigh both factors, displayed as a combined value (e.g. A95, C22, or D80).

PROBLEMS THIS SOLVES

1. **Wasted Sales Time** — Sales teams wasting cycles on low-quality leads — prioritization becomes data-driven.
2. **Poor Marketing Visibility** — Lack of insight into which efforts drive high-quality leads for resource allocation.
3. **Low MQL-to-SQL Rates** — Poor conversion rates from sales accepting leads of varying quality.
4. **Sales & Marketing Misalignment** — Disagreements on what constitutes a high-quality lead resolved with shared criteria.
5. **Manual Prioritization** — Eliminates rep reliance on gut feel to sort and evaluate leads.

DEFINITION OF SUCCESS

Achieved when sales **efficiently prioritizes high-potential leads**, resulting in higher MQL-to-SQL rates. Marketing **refines strategies and budget allocation** based on scoring data. After optimizing the lead score, most highly-scored leads move to **Closed-Won** and most low-scored leads are lost or disqualified.

SECTION 02

WHEN TO IMPLEMENT?

CLIENT PAIN POINTS THAT MAY TRIGGER THIS PROJECT

- **Sales reps overwhelmed** by mixed-quality leads with no clear prioritization system.
- Marketing **unsure which content or channels** are driving the most bookings.
- **Low engagement** from handed-off leads — reps working leads never truly qualified.
- Sales and marketing **misaligned** on what constitutes a high-quality lead at handoff.
- Declining or **stagnant MQL-to-SQL conversion rates** despite consistent lead volume.
- Teams seeking to **automate prioritization** beyond manual, subjective reviews.

THE RIGHT TIME TO IMPLEMENT — PREREQUISITES

Reliable Behavioral Data Tracking

Active tracking required — e.g., email opens and website visits via **Einstein Activity Capture** in Salesforce and/or the **HubSpot Tracking Pixel** and Gmail/Outlook plugins.

ICP & Buyer Personas Defined

Must be trackable through **specific CRM fields**. Without this, fit/grade scoring cannot be built accurately.

Cross-Team Buy-In

Required from **sales and marketing** for criteria input and ongoing feedback. Lead scoring only improves with consistent collaboration between both teams.

SECTION 03

KPIS

Lead scoring directly impacts the quality and efficiency of pipeline generation.
These are the key metrics to track once the system is live:

MQL → SQL CONVERSION RATE

Scoring highlights **hot leads** for reps, streamlining qualification and increasing conversion rates as time is focused on highest-potential prospects.

PIPELINE GENERATION

Marketing identifies which channels bring **highest quality leads**, shifting spend away from low-quality sources to increase pipeline.

WIN RATE

Higher-quality SQLs from **refined scoring criteria** lead directly to more closed-won deals over time.

SALES REP CAPACITY

Prioritization reduces time spent sifting through lead lists, allowing reps to **handle more volume** with less effort.

SECTION 04

CLIENT ROLES INVOLVED

MARKETING OPS

Defines **score types, criteria, and decay rules**. Collects ongoing feedback from sales and iterates on the model.

MARKETING LEADERSHIP

Reviews results to **refine content and targeting**. Reallocates spend to high-quality sources. Works with Sales Leadership to define Hot/Warm/Cold thresholds.

SALES REPS

Use scores and grades for **daily lead prioritization**. Provide ongoing feedback on the accuracy of the score relative to actual lead quality.

SALES LEADERSHIP

Reviews scores of leads being worked to ensure **reps use their time effectively**. Reviews closed-won/lost scores to validate score accuracy.

SECTION 05

TOOLS & TECHNOLOGIES

Lead Scoring Template Spreadsheet (HubSpot)

A framework for defining and calculating scores based on demographics, firmographics, and behaviors. **Clone and customize** for each client.

HubSpot Marketing Hub Pro/Enterprise

Stores records and calculates scoring via the built-in app. **Enterprise tier** adds access to AI Lead Scoring.

HubSpot Tracking Pixel + Gmail/Outlook Plugin

Captures **website interactions** for behavioral scoring. Logs email engagements — opens, clicks, replies — to inform behavioral scores.

Salesforce + Einstein Lead Scoring

Custom fields and flows for manual scoring. Einstein **automatically generates AI-driven scores** on conversion patterns and custom fields.

Einstein Activity Capture

Records **sales rep interactions** for additional behavioral scoring signals.

SECTION 06

QUESTIONS BEFORE IMPLEMENTATION

NEED TO KNOW BEFORE STARTING

Q01 Do you have any **pre-conceived ideas about lead scoring**? Have you used lead scoring at a previous company?

Q02 What is the **purpose of the lead score** — measuring engagement, setting sales thresholds, or providing additional info for sales?

Q03 What **type of score is needed** — behavioral/engagement, fit/grade, combined, or deal-based?

Q04 Which **objects will the score apply to** — contacts, companies, deals?

Q05 What **explicit data points** (e.g., job title, company size, industry) indicate a good fit for your ICP?

Q06 What **behavioral signals** show interest — email opens, form submissions, pricing page views?

Q07 What actions or properties should be included in the **score criteria** — page visits, meetings, event attendance?

Q08 How should different criteria be **weighted** to reflect their relative importance in qualifying leads?

Q09 What data is available in the **CRM to build effective score criteria**, and how current and accurate is it?

Q10 What **integrations** — email tools, websites, event platforms — need to feed data into the scoring model?

Q11 How will different teams use the scores, and are their **goals aligned** around the same definition of quality?

Q12 Are there clear **qualification criteria** that could be handled by workflows instead of scoring?

NICE TO KNOW

Q13 What is the **desired max score** (e.g., 100 or 500), and should custom score ceilings be set per category?

Q14 Do you need **negative scoring** for actions like unsubscribes or extended inactivity?

Q15 Which **negative behaviors should deduct points** — unsubscribe, no activity for 30 days, spam complaints?

Q16 Should **scores decay over time** — e.g., reduce points for engagements that occurred several months ago?

Q17 Will scoring apply uniformly or **differ by segment** — industry, source, or buyer persona?

Q18 Based on past closed-won deals, which **industries, job roles, or engagement patterns** correlate with higher conversion?

Q19 What **professional demographics** have leads submitted that correlate with higher conversion rates?

Q20 How have leads **engaged with your website/brand**, and does this engagement pattern predict conversion?

Q21 What behaviors — downloading offers, opening emails, attending webinars — indicate a lead is **more likely to convert**?

Q22 Who owns **ongoing optimization**, and how often will reviews occur — e.g., quarterly?

RELATED — NOT ALWAYS RELEVANT

Q23–26 Custom traits, **regional/cultural differences**, sandbox testing scenarios, rep rollout and training plans.

Q27–31 **AI tools for predictive scoring**, optimal engagement times via AI insights, CRM features like time decay or group limits.

Q32–35 Analytics review cadence, **multiple scoring systems** for diverse audiences, additional scoring property applications.

SECTION 07

ADDITIONAL DETAILS & CONTEXT

Start with Behavioral Scoring

Begin with engagement-based scoring for the most immediate impact. Add fit/grade later once behavioral signals are dialed in. **Combining them prematurely** adds unnecessary complexity.

01

Explicit vs. Implicit Data

Use **explicit data** (job title, revenue, industry) for fit scoring and **implicit data** (page views, email clicks, webinar attendance) for engagement scoring.

02

Score Ceilings by Category

In HubSpot, group criteria into categories and set **per-category maximums** to prevent a single channel from dominating the total score.

03

Demo Requests Do Not Boost Score

Do not add points for MQL triggers like demo request submissions. The score should reflect **auxiliary engagement** — some leads go to sales before accumulating a high score.

04

Score Decay

Turn on decay to automatically reduce points for old events — e.g., **50% every month**. Keeps scores reflective of recent behavior, not historical spikes.

05

HubSpot AI Lead Scoring

Available for **Marketing Hub Enterprise only**. Requires a minimum of 50 contacts (25 converted / 25 non-converted) to train the model and generate an AI-driven score.

06

SECTION 08

STEP BY STEP

This section covers setup across both HubSpot and Salesforce. Steps in Phase 2 and 3 are platform-specific — complete only the relevant path based on the client's CRM.

PHASE 1

Discovery & Alignment

Estimated time: 1–2 sprints

01 Get Buy-In
Align marketing and sales leadership. Define project success criteria and discuss a **tentative go-live and rollout plan**.

02 Define Scope
Align on which **score types** will be implemented: behavioral, fit/grade, combined, or deal-based.

03 Review ICP & Buyer Personas
Map CRM fields for fit/grade scoring (e.g., industry, company size, job title).

04 Document Proposed Criteria
Use the HubSpot template spreadsheet. Send to client for approval before building.

PHASE 2

HubSpot Configuration

Estimated time: 2–3 sprints

01 Build the Score
Assign points to engagement behaviors. **Set category ceilings** to prevent score inflation from a single channel.

02 Set Score Thresholds
Configure **Hot/Warm/Cold** thresholds. Bring into Salesforce or create a formula property if needed.

03 Enable Score Decay
For engagement or combined scores, turn on decay per event (e.g., reduce by 50% every 3 months).

04 Nurture or Route to Sales
Use workflows or lists to send qualified leads to sales based on **score thresholds**.

PHASE 3

Salesforce Configuration

Estimated time: 2–3 sprints

01 Manual Scoring (SFDC Flow)
Create a Lead Score field and optional Lead Grade picklist. Build a **record-triggered flow** with decision and assignment elements.

02 Einstein Lead Scoring
Go to Setup → Einstein Lead Scoring → Get Started. Select model fields and **review AI-generated insights**.

03 Sync Scores Across Systems
If scores calculated in HubSpot, create a Lead Score field in Salesforce and **map via the Connector App**.

04 Add to Page Layouts
Surface score and grade fields on Lead and Contact layouts for easy rep sorting.

PHASE 4

Launch, Iterate & Optimize

Estimated time: Ongoing

01 Execute Go-Live Plan
Deploy scoring to production. Set filters to **only score activities after the go-live date** for a clean baseline.

02 Gather Rep Feedback
Ask reps: why did this high-score lead not qualify? Use answers to **refine criteria weighting**.

03 Update Criteria
Adjust scoring weights based on feedback and **closed-won/lost opportunity data**.

04 Establish Review Cadence
Schedule **quarterly analysis** of scores vs. win rates. Reassess sooner if new channels launch.

SECTION 09

POSSIBLE PROBLEMS

Stakeholders Misaligned on What the Score Represents

SOLUTION

Clarify that a lead score-up is only **one of several MQL triggers**. Reiterate that the score reflects engagement and fit, not intent to buy. Some leads are sent to sales before accumulating a high score.

Score Inflation from Overlapping Signals

SOLUTION

Set timeframes (e.g., in the last 3 months) and **per-category score ceilings** in HubSpot. Review with historical data to calibrate and prevent any single channel from dominating the total score.

Poor Data Quality or Missing Tracking

SOLUTION

Audit and implement tracking tools before launch — **HubSpot pixel** for web activity, EAC or Gmail/Outlook plugin for emails. Clean CRM data pre-launch and set expectations that accuracy depends on data completeness.

Scores Influenced by Very Old Data

SOLUTION

If the client wants a clean baseline, set filters on each engagement criterion to **only score activities after the go-live date**.

Low Team Adoption

SOLUTION

Provide training sessions and demo videos. Build reports showing **score-to-win-rate correlation** to prove value. If reps have lost trust in the score, remove it from view, let data accumulate, refine it, then re-launch.

Misaligned Criteria with Business Reality

SOLUTION

Analyze **closed-won and lost opportunity data** against lead scores. Adjust the weights of criteria that do not correlate with actual conversions.

SECTION 10

SUMMARY

POSSIBLE NEXT STEPS

- Develop **custom reports** — win rates by score bucket, average/median lead score by original source.
- Add **emerging signals** as new content types and channels come online.
- Target campaigns at **high-grade prospects** to increase conversion efficiency.
- Build a **combined score** once behavioral and fit scores have been independently validated.

RECURRING TASKS

- Quarterly or yearly **feedback sessions** with sales and marketing to review score accuracy.
- **Criteria optimization reviews** based on closed-won/lost data and conversion trends.
- Data audits to ensure **tracking tools are active** and new signals are captured.
- Revisit scoring model sooner if **new marketing channels launch** or conversion trends shift.

WHAT PROJECTS DOES THIS UNLOCK?

ENHANCED ICP MODELING

Score data reveals which firmographic and demographic attributes actually correlate with conversion, sharpening the ICP definition over time.

AUTOMATED WORKFLOWS FOR SCORED LEADS

Once thresholds are trusted, trigger automated nurture sequences, rep assignments, and MQL handoffs based on score changes.

A/B TESTING OF ENGAGEMENT SIGNALS

With a scoring baseline established, test which engagement signals most predictably drive qualified pipeline.

PREDICTIVE LEAD SCORING (AI)

Once enough conversion data exists, upgrade to AI-driven scoring in HubSpot Enterprise or Salesforce Einstein for fully automated model refinement.