Lead Scoring Checklist

Below is a list of potential lead scoring items. This checklist is designed to be a thought-provoking laundry list rather than suggestions. Blank space is added for additional lead scoring items you may need.

Demographic Items

- Typically applies the individual or individuals making the purchase
- Level in organization (VP, Director, Assistant, Student, Intern)
- Role in Organization (Executive, Sales/Marketing Department)
- Male/Female
- Salary
- Age
- Years at company
- Education level
- Value of home
- _____
- _____
- _____
- _____

BANT

Budget

- Does prospect have a budget?
- Is the budget reasonable for the purchase?
- Is the budget in this period or future?
- _____
- _____

Authority

- Does our prospect have purchasing authority?
- Does our prospect have influence over purchasing authority?
- Committee decision?
- How many of the committee members do we have influence over?
- Do we know all the decision makers?
- _____
- _____

Lead Scoring Checklist

Need

- Is there a genuine fit between the client's needs and our product's ability to solve those needs?
- Does the client see the connection between our product's attributes and their needs?
- Does the client understand their own needs?
- Is our product best of breed for this client?
- How do we stack up against the competition? Is our product the best option for this client?
- _____
- _____

Timing

- Will the purchasing decision me made in a reasonable time frame?
- Does the client's timetable match well with our SalesMap?
- _____
- _____

Firmographic

- Industry Fit (Healthcare, Manufacturing, Transportation, etc)
- Business Size
- Number of Employees
- Headquarters or Branch
- Public company or private
- Company name (Joe Smith President Joe Smith, Inc.)
- CRM system
- Computer hardware system
- Phone system
- Number of computers
- Annual advertising spend
- Building size (square feet)
- Annual stock price appreciation
- _____
- _____
- _____
- _____

Lead Scoring Checklist

Behavioral

- Data quality
  - Bad data input (i.e. a@a.com)
  - Good first/last name
  - Company email vs. personal
  - Complete profile vs. skips answers to data inputs
- Inferred from ISP (Country, etc)
- Lead source
- Engagement measures
- Sales readiness behaviors
- Attends webinar
- Attends seminar
- Visits webpage
- Downloads
- Frequency of interaction
- Visits specific page on web such as pricing or buy now
- Watches demonstration or product videos
- Opens emails
- Lands on our website via certain Google Keywords (this can be tracked)
- Follows us on Twitter
- Likes our Facebook page
- Comments on our blog
- Engages in Facebook dialogue
- _____
- _____
- _____
- _____
- _____
- _____

Lead Scoring Checklist

Score degradation

- Lead gets old
- Buyer demonstrates tire kicking behaviors such as price checking every item or requesting catalogs on too many items
- RFP too early in process
- RFP too late in process
- Multiple unrelated contacts appearing to be the purchaser
- _____
- _____
- _____
- _____