Contact
SCORING

Contact Scoring

In today's world where time is a commodity in sales, well-streamlined sales have become imperative. One useful way to save time while increasing sales is to make sure that you focus on the best available contacts, and not waste time on inactive/dead-end contacts.

In this handbook, we'll tell you how you can increase your marketing effectiveness and contact quality using Contact Scoring.

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Earning contacts for successful business

Have you found smarter ways to become a bigger presence in your industry? Personalized content, best marketing practices, and, of course, identifying the contacts?

Effective contact management is necessary to organize the contacts and lay hands on the ones who are sales-ready.

This guide details the best practices of contact scoring, its execution, and how your business can benefit from it.

What is contact scoring?

Contact Scoring is an effective way to manage and analyze your contacts, helping you discover quality contacts and giving you insights about their stage in the sales funnel. Contact scoring is all about giving scores to your email recipients based on their profile, campaign responses, and website behavior. Using these scores, you can infer the progress of your potential contacts, and watch them become customers.

For example, contacts who engage with your content, website, and events are going to get higher scores than those who are only subscribed to your newsletter.

In this guide, we tell you how to set up contact scoring, and how contact scores are determined through campaign activities, contact information, and website activities.

Why is contact scoring important for my business?

About 73% of contacts are not sales-ready, says Marketing Sherpa. Contact scoring helps overcome this by identifying your contacts. Some contacts might have scored high and some might have scored low. You can nurture them based on their scores. It streamlines marketing and sales in a way that even the smallest of businesses benefit from it.

Scoring information helps marketers find the right contacts

Contact scoring helps marketing determine the characteristics and value of each contact and to decide which contacts should be delivered to sales, which contacts require more targeted marketing.

Contact scoring increases revenue

Businesses that implement contact scoring models benefit from better coordination between marketing and sales, contacting to a higher percentage of industry revenue.

Send follow-ups based on contact score

Use contact scoring to identify the stages of purchase-readiness and to generate different types of follow-up for each. This helps in faster qualification of contacts.

## Contact quality is directly proportional to sales productivity

You can observe elevation in the sales productivity when the quality of contacts increase. Contact scoring ensures that sales always receive high-quality contacts.

What are the data I should consider for scoring?

When scoring contacts, take into account the information you've gathered about them. The following section will suggest ways to analyze the quality of the contact and to determine when you can expect your sales call with them. For example, contacts who engage with your content, website, and events are going to get higher scores than those who are only subscribed to your newsletter.

Before you do this...

1) Marketing and sales should discuss the characteristics that would decide an ideal buyer.

2) For marketing to carry out contact qualification, the contacts should satisfy the criteria they have set for an ideal buyer.

3) Set a target score that decides when a contact can be passed on to sales.

4) Contact attributes
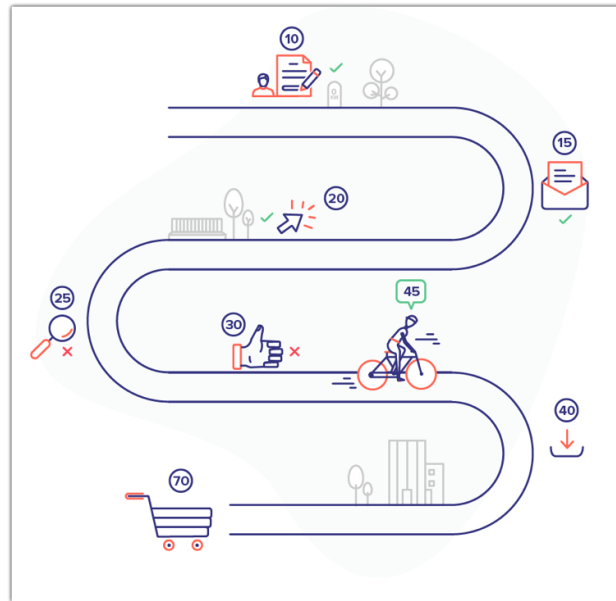
Contact attributes are determined by the information that a contact provides to your business.

Geographical location

Where is the company located?

Score your contacts by how favorable the company's location is to you, i.e., whether your services are functioning at the company's location.

Job title

What is the contact's role in the company? (E.g., CEO, Manager.)

1)   The higher the contact's position in the company, the more decision-making power they will have.

2)   Score your contacts based on the job title. You may assign a higher score to the CEO than you do to the manager

Behavioral Scoring

Job Title	Activity	Score
Marketer	Downloads buyer's guide	+ 60
Sales Executive	Visits pricing page	+ 100
CEO	Watches a video	+ 70
Project Manager	Opens email	+ 20
Director	Clicks email link	+ 40

Company size

How many employees does the company have? What are the physical resources of the company?

Check if the size matches your expectations, measured in revenue, number of customers and number of employees, and score the contacts accordingly. E.g., Company A has total employees more than 10,000 and company B has total employees less than 2000. With scoring, contacts from company A earn more scores than the contacts from company B.

Industry

What is the company's product?

1) Know contacts' industry, its products, branding and compare with the characteristics of the ideal customer and determine whether the industry really needs your services.

2) Assign scores if the contact belongs to your target industry.

Annual revenue

What financial resources does the company have? What is its turnover?

1) Analyze the revenue, spending capacity, sales performance of the contacts' organization.

2) Consider scoring them if all these elements match your ideal contact profile characteristics.

All this data can be grouped as explicit information that contacts give you. You can also use customer relationship management (CRM) software to collect this data and to build a contact profile. With this profile, marketing can easily decide if the contact fits your target audience.
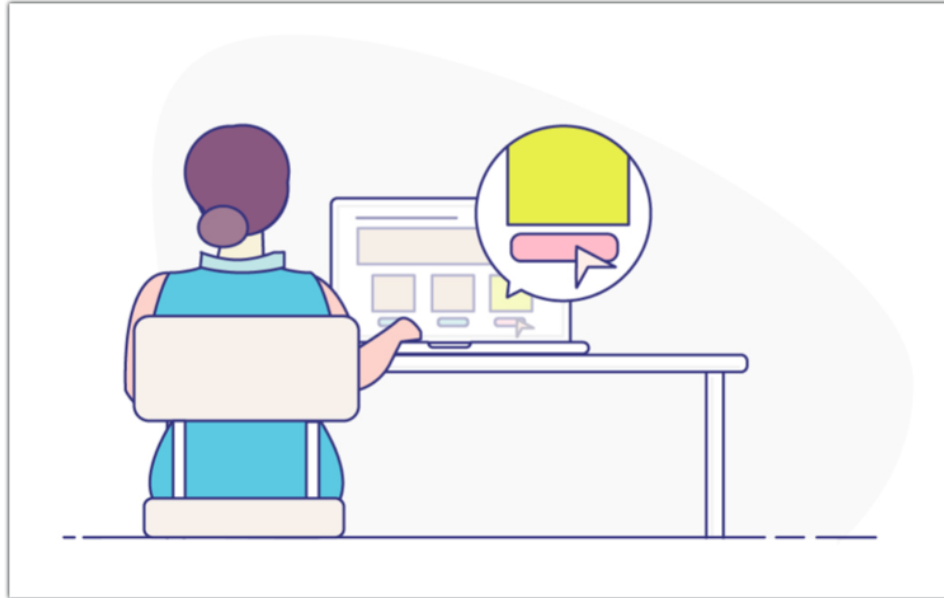
Contact activities

Contact activities are the behaviors that contacts display when engaging with your company. This information is collected indirectly rather than volunteered. All you have to do is set scores to each activity and analyze the results.

Some examples of such activities are:

1) Email opens
2) Email click-throughs
3) Email forwards
4) Referrals
5) Social media responses

From these behaviors, you can infer the level of interest they show in your product. You can prioritize activities with increasing/decreasing scores.

In Zoho Campaigns, we have designed a default scoring system covering the major activities with scores allotted. However, these scores can be customized as needed.

Note: The more recent an activity, the higher the score should be. An activity within the last 15 days has more value than the one three months ago.

Classifying contacts for efficiency- Most-engaged, Progressing, Getting Started

Defining your contacts' stage in the sales funnel will help you understand their quality and determine when they will be sales-ready. Our contact scoring system lets you classify contacts into Most-engaged, Progressing, and Getting Started based on their scores.

Most-engaged: Most-engaged contacts are the ones who responds to all emails in a positive way. Contacts who opens all your campaigns, click links in your campaigns, and meets all campaign activity criteria are most-engaged.

Progressing: Progressing contacts are those who responds to your campaigns but not as actively as the most- engaged contacts.

Getting Started: Contacts who do not fall under the above two categories fall into this one. These contacts may be new or they may have a lesser score due to minimal response.

Introducing custom rules

A custom scoring system is specially designed for activities you feel should have more significance in contact evaluation. The setup process lets you define criteria(rules) for contact activities and your contacts will be assigned with points when they meet those criteria. You can assign both positive and negative scores for the conditions that you set in custom scoring.

For example, if you want to send a marketing campaign about your new product launch and prefer to score your contacts' higher clicking and performing actions on a specific URL, this is where custom rule comes into the picture. Custom rule lets you set criteria particular to the desired URL and assign scores to contacts.

Set up contact scoring

As an organization admin, you can set up contact scoring for your organization by following these instructions:

1) Log in to your Zoho Campaigns account.

2) Select the Contacts tab from the navigation bar and click Contact Scoring. A welcome page will appear.

3) Click Assign Scores Now to start the setup process.

Note: Contact scoring is available for all users under the subscription plan.

Qualifying contacts through campaign activities

Zoho Campaigns provides you with an array of campaign activities that can be used to score your contacts and discover their place in the sales pipeline. Any contacts with your target score can be considered marketing- and sales-qualified.

Open the Contacts and select Contact Scoring, then navigate to Campaign Activities in the Scoring Setup tab.

Here are all of the campaign activities your contacts may perform:

1) Unique Open-Open the campaign just once

2) Multiple Open-Open the campaign multiple times

3) Unique Click-Click the attached links just once

4) Multiple Click-Click the attached links multiple times

5) Opt-in-Subscribes to your website

6) Tell-a-friend-Refers a friend to your website

7) Unique Reply-Replies to your email campaign

8) Multiple Reply-Replied to your email campaigns multiple times.

9) Positive Reply-Has sent a positive/productive reply to your email campaigns.

By default, each campaign activities specified will possess a score. You can edit the scores as you wish.

Edit scores

You can edit your scores any time you wish to change activity priorities. Contacts will start getting the new scores as soon as you've changed priorities.

To edit contact scores:

1) Open the Contacts tab and select Contact Scoring then navigate to Campaign Activities in the Scoring Setup tab.

2) Click the Edit Score icon on top of the score sheet.

3) Use the right and left arrows on the score sheet to adjust scores based on priority.

For example, the unique open action has a score of 10 and your contact has a score of 10 from that. If you edit the score for unique open from 10 to 20, next time the contact opens a new campaign, they will be awarded with 20 more points and the new contact score will be 30.

Note: Scores for multiple actions (i.e., multiple opens, multiple clicks) will be applied when the contact performs the same action for the third time. For example, the score assigned for a unique click is 10 points, while multiple clicks get 30 points. The first time a contact clicks a campaign, they'll get 10 points. This score remains the same on the second click, Then jumps 30 more points when they click for the third time for a total of 40 points. Further clicks do not give higher scores.

Disable scoring

Score updates can be paused. Existing scores will remain the same until you enable scoring again.

To pause/resume scoring:

1) Open the Contacts tab and select Contact Scoring then navigate to Campaign Activities in the Setup tab.

2) Toggle the switch to Disable/Enable at the top of the score sheet.

Qualifying contacts through their field information

Zoho Campaigns provides scoring for contacts based on their profile information. All you have to do here is specify the fields and their corresponding values, the contact should contain to earn the score assigned.

1) Open the Contacts tab and select Contact Scoring, then navigate to Contact Field Information in the Scoring Setup tab.

2) Click Configure.

3) Fill in the required information

Name - A name that describe your criteria.

**Assign score -** This is the score that meeting your criteria will award.

Criteria - Define the scoring conditions that must be met by using the drop-down menus. You can define up to three conditions for each criteria.
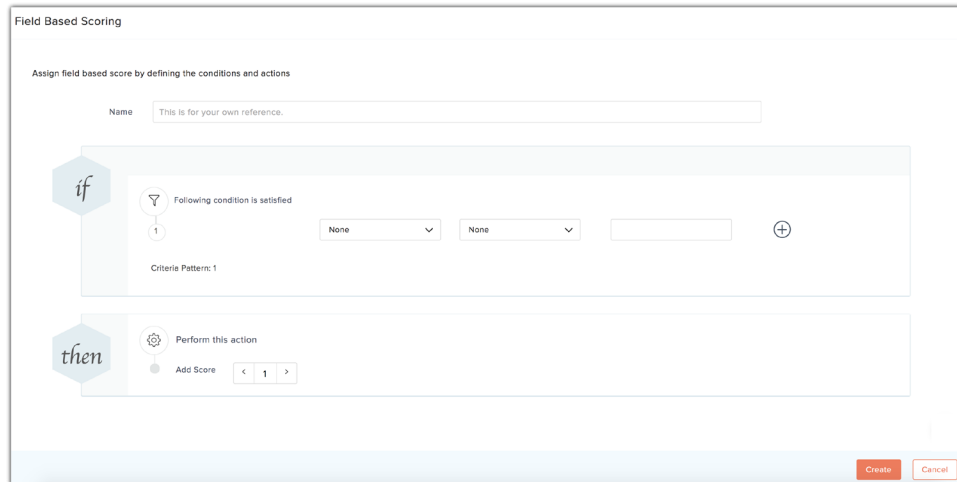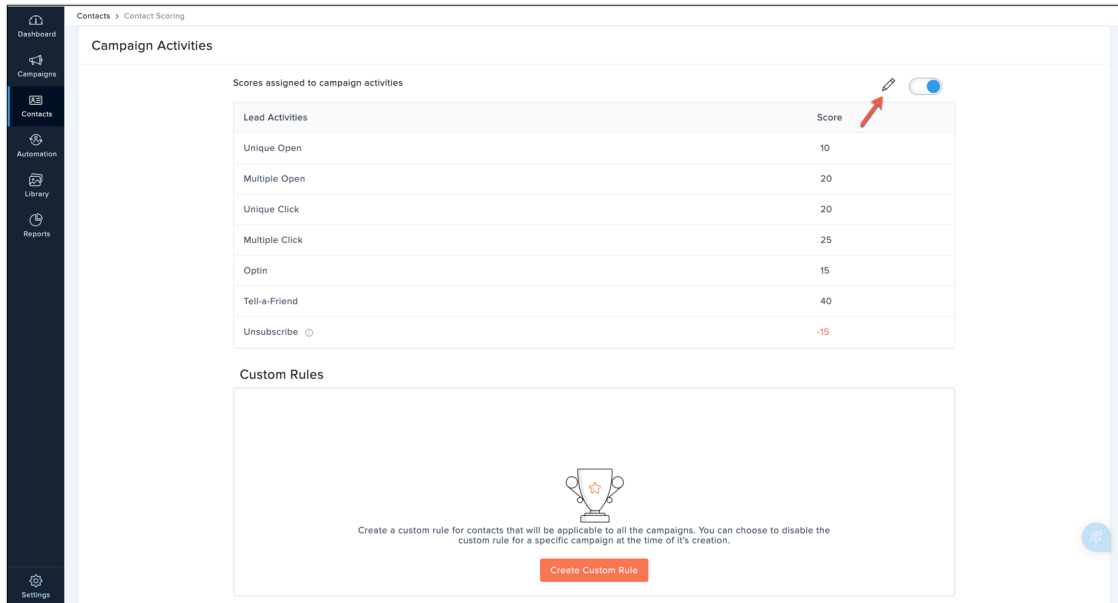
Negative scoring

You can subtract the scores for your contacts when they perform any action in your emails that you consider as negative. Using this, whenever a contact makes any specific negative response that you've set, the assigned score will be subtracted from the overall score. To setup negative scoring:

1) Open the Contacts tab and select Contact Scoring then navigate to Campaign Activities in the Scoring Setup tab.

2) Enable the toggle at the top-right. Only then the negative scoring setup will be enabled.
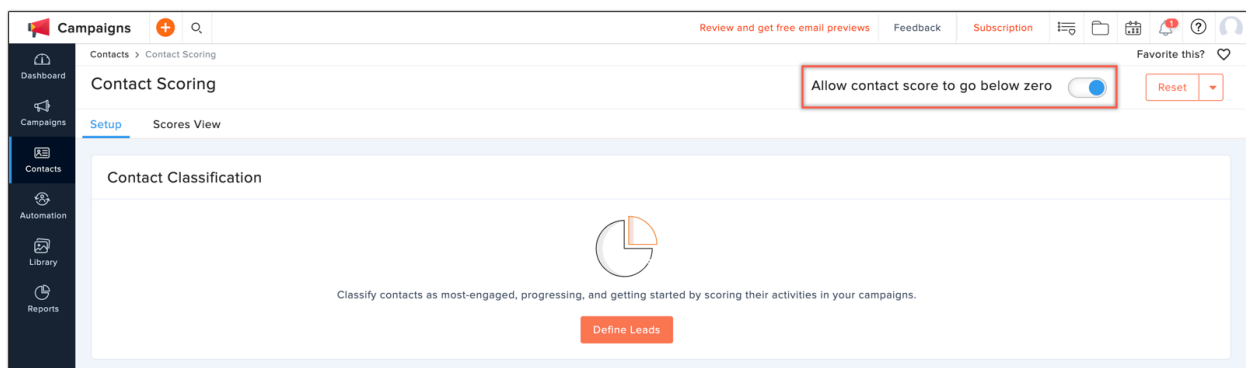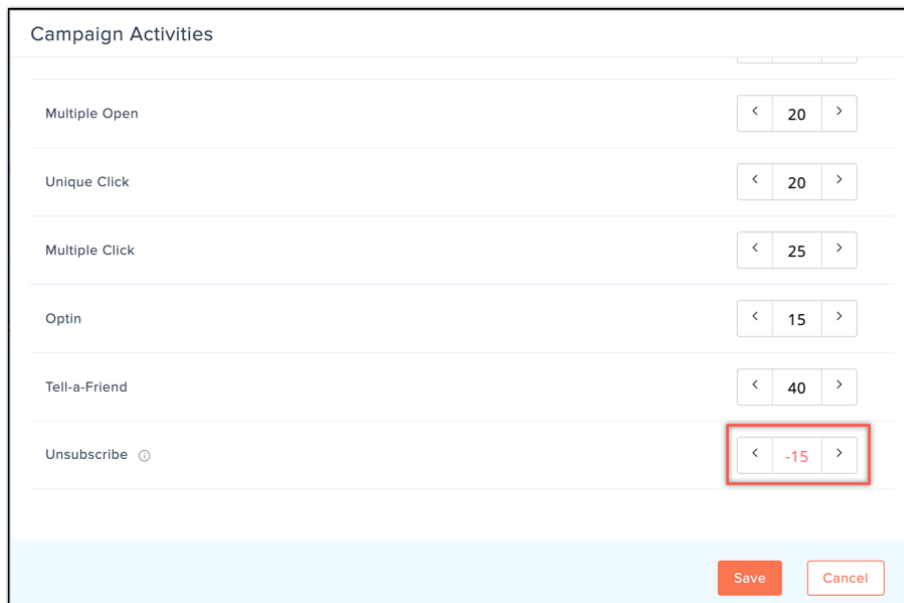
3) Click the Edit Score icon on top of the score sheet.

4) Use the right arrows on the score sheet to assign negative scores.

5) The least value that you can assign is -50.

Conclusion

Contact scoring helps you analyze the quality of your contacts based on their response to your email campaigns. It helps you identify different types of contacts and devise specific strategies to engage all contacts.

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