

Lead Scoring App Overview

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What is Lead Scoring?

- Lead Scoring makes sales more efficient by focusing on the most promising leads first
- Create Lead rules to score some leads higher than others based on who they are
- Create Campaign Member rules to score leads based on what they do
- Prioritize leads based their score so that Sales can focus on the best ones first

Lead Scoring Rule
Lead Annual Revenue greater or equal 5000000

Lead Scoring Rule Detail [Edit](#) [Delete](#)

Lead Scoring Rule Name	Lead Annual Revenue greater or equal 5000000
Type	Lead
Score	5

[Rule Criteria](#)

Field Name	Operator	Value
Annual Revenue	greater or equal	5000000

[Edit](#) [Delete](#)

Lead Detail [Edit](#) [Delete](#) [Convert](#) [Clone](#) [Find Duplic](#)

Lead Owner	Admin User [Change]	Campaign Score	5
Name	Jane Doe	Lead Score	5
Company	Acme	Total Lead Score	5
Title	VP Marketing	Lead Priority	C
Annual Revenue	\$6,000,000	Phone	

Lead Scoring Rule
Campaign Member Attended equals TRUE

Lead Scoring Rule Detail [Edit](#) [Delete](#)

Lead Scoring Rule Name	Campaign Member Attended equals TRUE
Type	Campaign Member
Filter By Campaign (optional):	
Score	5

[Rule Criteria](#)

Field Name	Operator	Value
Attended	equals	TRUE

[Edit](#) [Delete](#)

Campaign Member Detail [Edit](#) [Delete](#) [Clone](#) [Convert Lead](#)

Campaign	2009-Q3-Webinar	Company (Account)	Acme
Lead	Jane Doe	Title	VP Marketing
EncryptedKey	U41JdZ5mENVgzNcbXmFCA_3D_3D	Phone	
Campaign Score	5	Email	
Owner			
Account			

[Event Details](#)

Status	Attended
Other	
Registration	Yes
RSVP	Yes
Attended	☒

Lead Detail [Edit](#) [Delete](#) [Convert](#) [Clone](#) [Find Duplic](#)

Lead Owner	Admin User [Change]	Campaign Score	5
Name	Jane Doe	Lead Score	5
Company	Acme	Total Lead Score	10
Title	VP Marketing	Lead Priority	C
Annual Revenue	\$6,000,000	Phone	

Lead Scoring Best Practices

- Plan your rules before you create them
- Talk with Sales about what criteria are the most important
 - Agree upon rules & scores
 - Decide on criteria to pass leads from Marketing to Sales
(Example: Lead Priority = “A”)
 - Decide if “lead clawback” is appropriate
(Example: For Sales owned Leads not converted after 3 months, change owner back to Marketing Queue)
- Analyze past deals to determine what drives pipeline & revenue
- Create rules for both lead attributes (lead fields) and behavior (campaign member fields)

Lead Scoring Example Rules

- Attribute Rules (Lead Rules):
 - Email Opt Out = True: -30 points
 - Title Contains Chief: 5 points
 - Title = CEO: 5 points
 - Industry = Healthcare: 5 points
 - Annual Revenue > \$1,000,000: 5 points
 - Has Budget = True: 15 points
 - Has Need = True: 5 points
 - Has Authority = True: 10 points
 - Timing Right = True: 5 points
- Behavior Rules (Campaign Member Rules):
 - Campaign Member Responded = True: 1 points
 - Campaign Member RSVP = True: 2 point
 - Campaign Member Status = Attended: 5 points

How to Set Up and Use the App

1. Install App
2. Override Buttons
3. Add Lead Scoring Rule fields to your lead page layouts
4. Optional: Create Lead Grade
5. Create new rules on the Lead Scoring Rules tab
6. Optional: Score All Leads
7. Measure & Iterate on your rules
8. Optional: Add Lead Scoring Tabs
9. Optional: Map fields to Contact
10. Limitations & Gotchas

<https://na1.salesforce.com/a2x3000000000R2>

Standard Buttons and Links				
Action	Label	Name	Overridden	Content Name
Override	Lead Scoring Rules Tab	Tab	☐	
Override	List	List	☐	
Override Reset	View	View	☒	LeadScoringRuleDetail LeadScoringRuleDetail
Override Overrides - row 3 - View	Edit	Edit	☒	LeadScoringRulesEdit LeadScoringRulesEdit
Override	Delete	Delete	☐	
Override Reset	Clone	Clone	☒	LeadScoringRulesEdit LeadScoringRulesEdit
Override Reset	New	New	☒	LeadScoringRulesEdit LeadScoringRulesEdit
Override	Accept	Accept	☐	

Lead Score	79,348		
Campaign Score	37,262		
 Total Lead Score	71,293		

Simple Formula

Advanced Formula

Insert Field

Lead Priority (Text) =

if((Total_Lead_Score__c < 30, "C", if((Total_Lead_Score__c < 50, "B", "A"))

Rule Criteria		
Field Name	Operator	Value
Lead Source	equals	Google Adwords

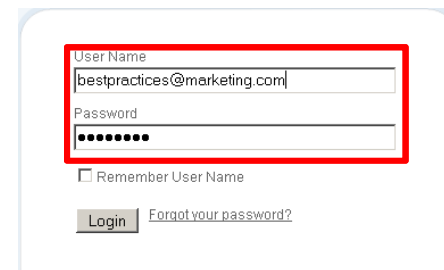
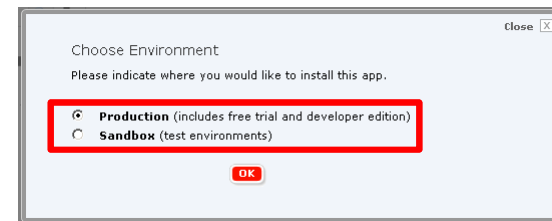
 Score All Leads and Campaign Members

Score All Leads

<u>Closed Opportunities</u>	What opportunities have been won?
<u>Opportunity History Report</u>	Show me the lifecycle of my opportunities.
<u>Opportunity Field History Report</u>	What is the data history of my Opportunity Fields?
<u>Details of Downgraded Forecast</u>	Show me what opportunities have been downgraded in my forecast.
<u>Opportunity Stage Duration Report</u>	Show me how long an opportunity spent at each stage.

1) Install the app

1. Click on Get it Now
2. Decide between deploying to production, or your Sandbox if you have one
3. Log In with your salesforce login
4. Agree to terms & conditions



Salesforce.com Terms & Conditions:

If salesforce.com is not listed as the provider of this application, or if the provider listed is Force.com Labs, then the application is not provided or warranted by salesforce.com. You and/or other users at your company may be able to use this application to access your or your company's data in the salesforce.com system. However, using this application may also result in transmission of such data out of the salesforce.com system. To the extent data is transmitted out of the salesforce.com system, salesforce.com is not responsible for the privacy, security or integrity of that data.

☒ I have read and agree to the above terms & conditions

1) Install the app (continued)

5. Click Continue & Approve API Access

Package Installation Details

Package Name: Lead Scoring
Version Name: Lead Scoring
Version Number: 1.13
Publisher: salesforce
Description: Changed the LSR Detail and Edit pages to display the field label instead of the field name. 57 rule limit is

Continue Cancel

Package Components

Action	Component Name
Create	Lead Scoring

Package Installer
Lead Scoring

Step 1. Approve Package API Access

These settings control the access that s-controls and other components in this package detail page. [Tell me more](#)

6. Set security options, which determines who can create rules.

- Note: You may want to only give Full Access to Marketing. The downside is that Lead Scoring will be a black box to sales, hurting alignment
- A workaround for Sales:
 - Give Full Access to Marketing & no access to Standard User
 - Clone the Standard User profile
 - Set Lead Scoring Rule to Read only for this cloned profile
 - Reassign all Standard Users to the new Custom: Standard User profile

Step 2. Choose security level

Select security settings

☐ Admin access only Best for limited deployments. Users with your profile will have full access.

☐ Grant access to all users All user profiles will have full access

☒ Select security settings Recommended for most packages

Customize security

These security settings will determine layout assignments, field-level security, and Read/Create/Edit/Delete permissions for the custom objects installed with this package. All standard profiles will receive full access on all installed custom objects, except for the Read-Only profile, which will receive read-only permissions.

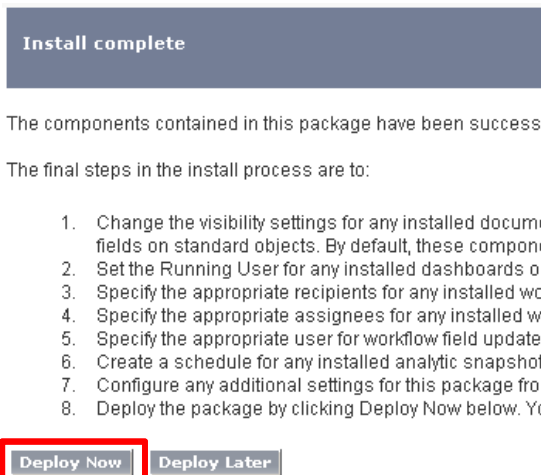
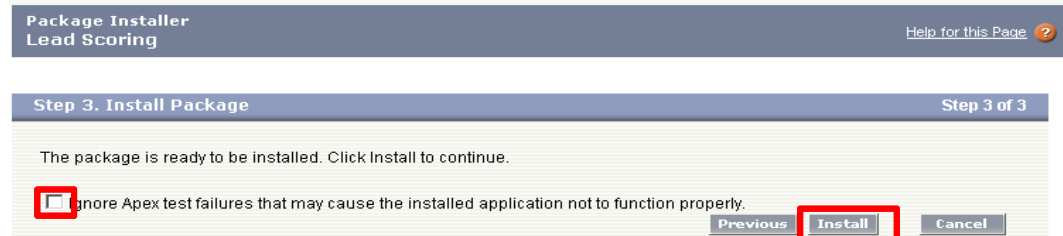
Action	Access Level	Description
Set All	No Access	No access to any features in this package.
Set All	Full Access	Full access to all features and fields in this package

Please select a level of access to the features in this package for each of your organization's custom profiles.

Profile	Access Level
System Administrator	Full Access (Your profile is required to have full access to the features in this package)
Custom: Marketing Profile	Full Access
Custom: Sales Profile	No Access
Custom: Support Profile	No Access
Standard User	No Access
Read Only	No Access
Solution Manager	No Access
Marketing User	Full Access
Contract Manager	No Access

1) Install the app (continued)

7. Optional – if you have test failures from other apps, the failures will prevent Lead Scoring from installing. If necessary, override Apex Test failures
8. Click Install
9. Finally, click Deploy Now to complete installation



2) Configure App: Override Lead Scoring buttons

- Click Setup→App
Setup→Create→Objects
- Click on Lead Scoring Rule
- Scroll down to Standard Buttons and Links
- For View:
 - Click Override
 - Select Visualforce Page
 - Select **Lead Scoring Rule Detail**
- For each of the buttons: Edit, Clone and New:
 - Click Override
 - Select Visualforce Page
 - Select **Lead Scoring Rule Edit**
- Once completed it will look like this:

The image shows four screenshots of the Salesforce setup interface, illustrating the steps to override Lead Scoring buttons.

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
- Create
 - Apps
 - Custom Labels
 - Objects**

Standard Buttons and Links

Action	Label	Name	Overridden	Content Name
Edit Del	Call Sheet			
Edit Del	Call Sheet Attendee			
Edit Del	Direct Mail Layout			
Edit Del	Lead Scoring Rule			

Standard Buttons and Links

Action	Label	Name	Overridden	Content Name
Override	Lead Scoring Rules Tab	Tab	☐	
Override	List	List	☐	
Override Reset View	View	View	☒	LeadScoringRuleDetail (LeadScoringRuleDetail)
Override - row 3 - View	Edit	Edit	☒	LeadScoringRulesEdit (LeadScoringRulesEdit)
Override	Delete	Delete	☐	

Override Properties

Save Cancel

Label View
Name View

Content Type Custom S-Control Visualforce Page

Content Name **Lead Scoring Rule Detail (LeadScoringRuleDetail)**

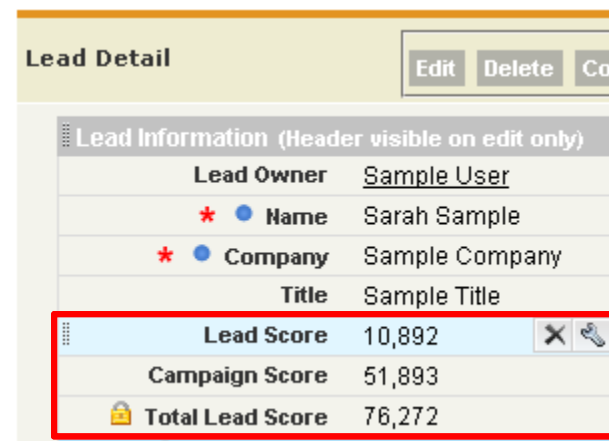
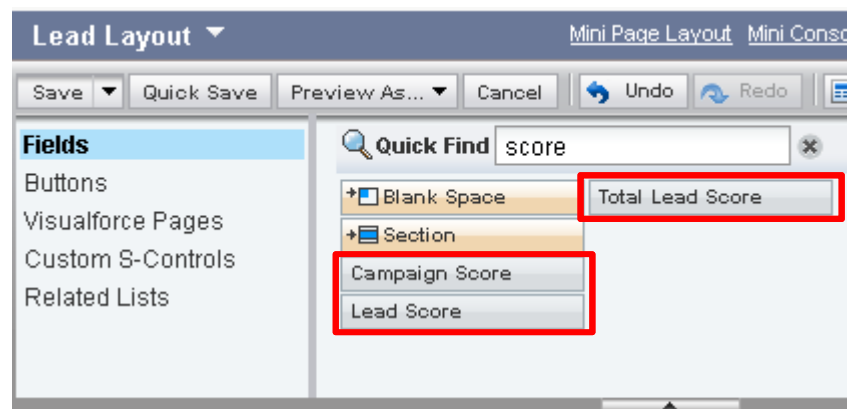
Comment **Lead Scoring Rule Detail (LeadScoringRuleDetail)**

Standard Buttons and Links

Action	Label	Name	Overridden	Content Name
Override	Lead Scoring Rules Tab	Tab	☐	
Override	List	List	☐	
Override Reset View	View	View	☒	LeadScoringRuleDetail (LeadScoringRuleDetail)
Override - row 3 - View	Edit	Edit	☒	LeadScoringRulesEdit (LeadScoringRulesEdit)
Override	Delete	Delete	☐	
Override Reset Clone	Clone	Clone	☒	LeadScoringRulesEdit (LeadScoringRulesEdit)
Override Reset New	New	New	☒	LeadScoringRulesEdit (LeadScoringRulesEdit)
Override	Accept	Accept	☐	

3) Configure App: Add fields to Lead Page Layouts

- Go to any lead, and click Edit Layout
- Quick find “score”, and drag the 3 fields to the page layout
- Save this page layout, and repeat for any other lead page layouts



4) Create Lead Grade (optional)

- Lead Grade is a calculated field that groups your leads based on their score
- Create a new custom field:
Setup→Customize→Leads→Fields
- Scroll down to custom fields, click New and select Formula, Next and then select Text
- Enter a formula to group leads by score. For example:
 - “C” leads are 0-29 points (less than 30)
 - “B” leads are 30-49 points (less than 50)
 - “A” leads are 50+ points
- Example Formula for the above
 - if(leadScoring__Total_Lead_Score__c<30,"C",if(leadScoring__Total_Lead_Score__c<50,"B","A"))
- Save, and then Add to the Lead page layout (Similar to the previous page)

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
 - Tab Names and Labels
 - Home
 - Activities
 - Campaigns
 - Leads
 - Fields**

Lead New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will store.

Data Type

- ☐ None Selected Select one
- ☐ Auto Number A system-generated number that automatically updates when the record is updated.
- ☒ **Formula**

Step 2. Choose output type

Field Label: Lead Grade Field Name: Lead_Grade

Formula Return Type

- ☐ None Selected Select one of the data types below.
- ☐ Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount. Example: Gross Margin = Amount - Cost__c
- ☐ Date Calculate a date, for example, by adding or subtracting days to other dates. Example: Reminder Date = CloseDate - 7
- ☐ Date/Time Calculate a datetime, for example, by adding a number of hours or days to another datetime. Example: Next = NOW() + 1
- ☐ Number Calculate a numeric value. Example: Fahrenheit = 1.8 * Celsius__c + 32
- ☐ Percent Calculate a percent and automatically add the percent sign to the number. Example: Discount = (Amount - Discounted_Amount__c) / Amount
- ☒ **Text** Create a text string, for example, by concatenating other text fields. Example: Full Name = LastName & ", " & FirstName

Simple Formula **Advanced Formula**

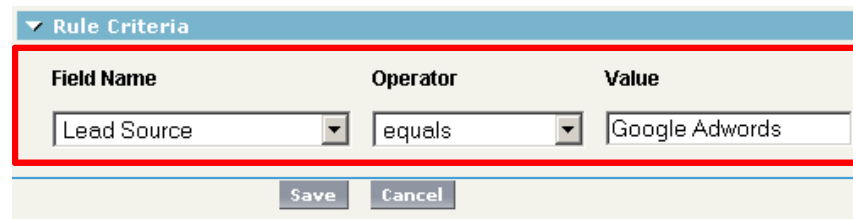
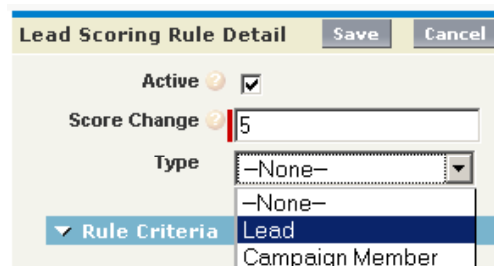
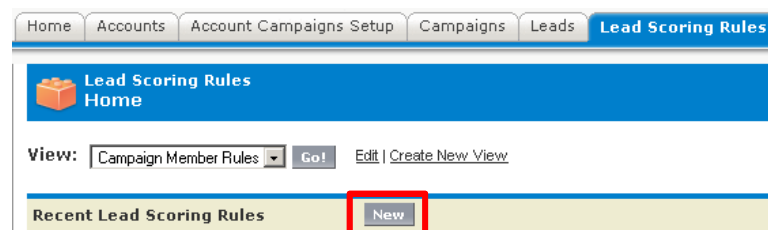
Insert Field **Insert Operator**

Lead Grade (Text) =

if(leadScoring__Total_Lead_Score__c<30,"C",if(leadScoring__Total_Lead_Score__c<50,"B","A"))

5) Create new Lead Scoring Rules

- Create new rules on the Lead Scoring Rules tab
- Click New to create a new rule
- Make the new rule active as only active rules are evaluated when a lead or campaign member is saved
- Set Score Change, which is how many points the lead gets if it meet the criteria
- For type, select Lead to create a rule based on Lead field criteria and Campaign Member to base it on campaign member fields
- Select the Field Name, Operator and Value such as “Lead Source” “equals” “Google Adwords”
- Save the rule, and now any time a lead meets the criteria, the score will update!*
- *Note that score updates are a split second after you hit save, so you must refresh (F5) the lead after saving to see the score change apply. Larger orgs may be slower.



Note: if your screen looks different than this example, ensure you have successfully overridden the “New” and “Edit” buttons to the “New” and “Edit” visualforce pages in step 2

6) Optional: Batch Score Leads tab

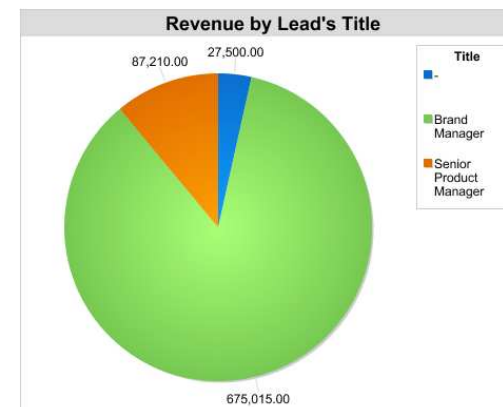
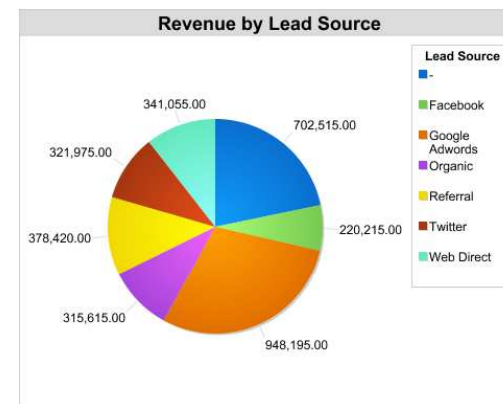
- The Batch Score Leads tab was created so that you can mass apply lead scores to all leads, even for rules you just created
- Click “Score All Leads” to update all leads and campaign members that meet your rules’ criteria
- **Warning!**
 - This will change “Last Updated Date” for all leads and campaign members that meet your rules’ criteria
 - Don’t click the button more than once or you’ll receive multiple emails
 - If you click the button 5x or more, the process will reset, and some leads will not be scored
 - Best practice is to restricting access to this tab due to its power

The screenshot shows the 'Batch Score Leads' tab in a CRM system. The navigation bar at the top includes 'Home', 'Accounts', 'Account Campaigns Setup', 'Campaigns', 'Leads', 'Lead Scoring Rules', 'Batch Score Leads' (highlighted), and 'Offers'. The main content area has a green header with the 'Batch Score Leads' title and a 'Score All Leads' button highlighted with a red box. Below the button, the 'Score All Leads' section explains the function: 'Click Score All Leads to score all non-converted leads and their campaign members using the active rules.' It also includes a note about receiving a confirmation email and a list of example uses: 1) 'You created your first rules and want to initialize all leads' and 2) 'You added or removed active rules and want to rescore all of your leads'. To the right, an 'Example Email Confirmation' shows an email from 'no reply on behalf of John Kucera' to 'John Kucera' with the subject 'Lead Score initialization for all leads Completed'. The email body states: 'The leads have been processed: 18 batches of 200 leads per batch with 0 failures.' Below this, the 'What is lead scoring?' section explains that lead scores prioritize leads based on who they are or what they do. It also mentions an example rule that gives 5 points to leads whose companies have revenue of 500,000 or more. At the bottom, the 'Example Lead Scoring Rule' section shows a rule with 'Lead Scoring Rule Number 15', 'Type Lead', and 'Score Change 5'. The 'Rule Criteria' section is partially visible.

7) Analyze & iterate

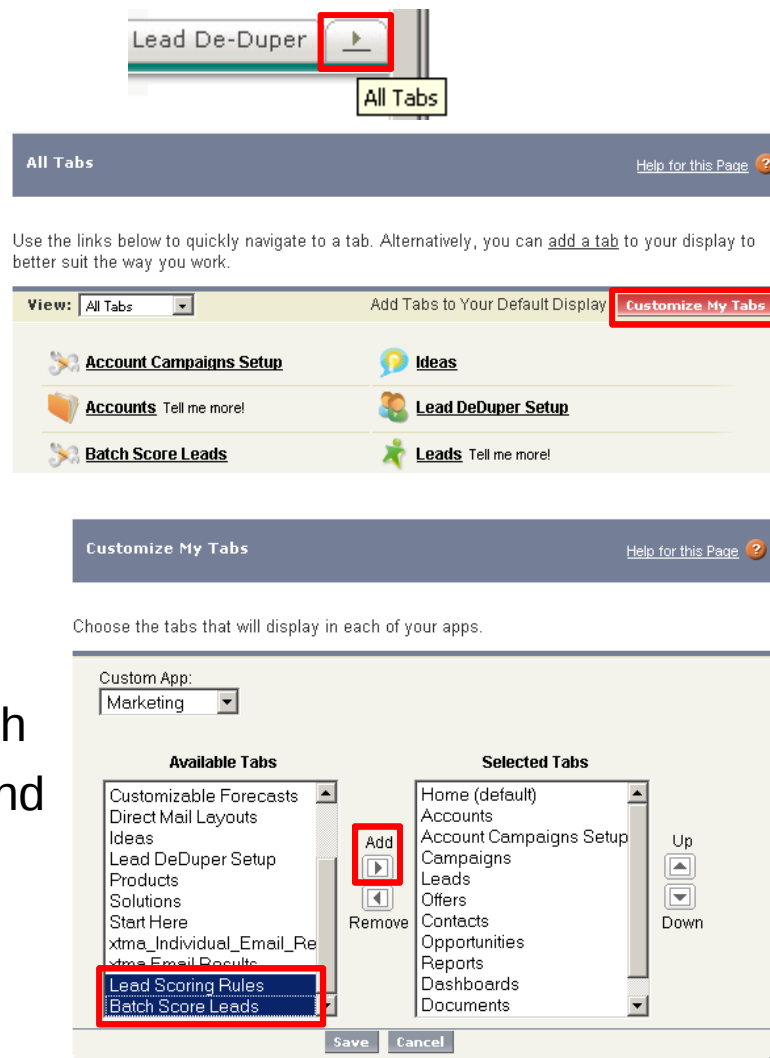
- As leads are converted and opportunities close, run reports to analyze trends to determine new lead scoring rules
 - Does industry matter?
 - Does company revenue matter?
 - Does Lead title matter?
 - Does webinar attendance matter?
 - Do some lead sources convert better than others?
- Talk with sales about what the rules should be, and how many points each rule should have
- Tweak “Lead Priority” (step 5) to lower the # points for “A” leads in slow times, and the reverse in high volume times so sales always has enough leads

Closed Opportunities	What opportunities have been won?
Opportunity History Report	Show me the lifecycle of my opportunities.
Opportunity Field History Report	What is the data history of my Opportunity Fields?
Details of Downgraded Forecast	Show me what opportunities have been downgraded in my forecast.
Opportunity Stage Duration Report	Show me how long an opportunity spent at each stage.



8) Optional: Add Lead Scoring Tabs to Marketing App

- You can use the Lead Scoring Rules app on the top right to see the Lead Scoring tabs, or you can add them to existing apps such as the Marketing App:
- Click on the All Tabs arrow “>”
- Click Customize My Tabs
- Select Lead Scoring Rules tab and Batch Score Leads from the Available Tabs, and click on Add



9) Optional: Map Lead Scoring fields on Contact

- If desired, you can track the lead score to the Contact upon conversion.
- Click Setup→App Setup→Customize→Leads→Fields, and scroll down
- Click Map Lead Fields
- Map Campaign Score to Contact.Campaign Score and Lead Score to Contact.Lead Score
- Finally, drag the fields to your Contact Page Layouts and save

The image displays four screenshots from the Salesforce interface illustrating the process of mapping lead scoring fields to a contact.

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- App Setup**
- Customize
- Tab Names and Labels
- Home
- Activities
- Campaigns
- Leads
- Fields**

Lead Custom Fields & Relationships

Action	Field Label	Data Type
Edit Del	Campaign Score	Number(18, 0)
Edit Del	Current Generator(s)	Text(100)
Edit Del	Is Duplicate	Checkbox
Edit Del	Lead Priority	Formula (Text)

Lead Custom Field Mapping

Take this lead custom field... and map it to this field

Campaign Score → Contact.Campaign Score

Current Generator(s) → -None-

Is Duplicate → -None-

Lead Priority → -None-

Lead Score → Contact.Lead Score

Contact Layout

Save | Quick Save | Preview As... | Cancel | Undo | Redo

Fields

- Buttons
- Visualforce Pages
- Custom S-Controls
- Related Lists

Quick Find: score

- Blank Space
- Section
- Campaign Score
- Lead Score
- Total Lead Score

Contact Information (header visible on edit only)

Contact Owner	Sample User
Name	Sarah Sample
Account Name	Sample Account
Campaign Score	6,880
Lead Score	7,023
Total Lead Score	57,959

Limitations & Gotcha's

- Maximum # Active Rules:
 - 200 Active Lead Rules
 - 450 Active Campaign Member Rules
- The following field types cannot be used as criteria for any rules:
 - Date, DateTime, & Time
 - Id (lookup fields) & Reference
 - Encrypted Strings
 - TextArea
 - Multi-Select picklists
 - Base 64
- Clicking “Score All Leads” more than once can reset other batch apex jobs you have running
- Cannot score website criteria nor degrade scores over time. Consider an AppExchange partner for advanced functionality such as this.
- Contacts cannot be scored, though Lead scores can be mapped upon conversion
- Note in v2.0, previous limitations on # records to be scored per day have been removed, and now all lead scores should appear immediately after save instead of requiring an additional page refresh (F5)

Technical Considerations (for orgs with apex code)

- If you use **Apex triggers or classes** note:
 - The # Active rules is limited by Apex script statement governor limits.
 - Limit of 200,000 script statements
 - 200 active lead rules for 200 leads updated uses ~170,000 script statements.
 - If you have custom Apex triggers or classes that run **over 30,000 script statements** when updating 200 leads or 100 members at once, your effective # active rules may be lower than the above
- If you use **Batch Apex** in your org note:
 - Score All Leads uses Batch Apex creates a cursor until the process completes
 - Batch Apex has a maximum of 5 cursors open at once
 - If you Clicking on Score All Leads while you have 5 other batch apex jobs running, **the oldest job is stopped** to run Score All Leads
- If you use **Asynchronous Apex** note:
 - As of v2.0, the Lead Scoring app no longer uses asynch apex so there are no longer conflicts with other apps using @future notation