

# Set Up Lead Scoring In Infusionsoft<sup>®</sup>

## Lead Scoring Overview

Scoring is most often used by businesses with direct sales teams. Automatic lead scoring is an objective way of assessing a prospect's level of interest based on their engagement level. Lead scoring allows sales reps to focus on their hottest leads, and prioritize their daily call list. In Infusionsoft, a score is a set of rules that automatically assign points to contact record based on tags applied, web forms submitted, links clicked, and emails opened.

Once enabled, the scoring process runs constantly in the background. When a tag is applied or removed, the score is updated in real time, adding and subtracting points from contact records based on the criteria you've defined. The score is assigned to a contact record, but it is also displayed on a contact's opportunity record . Every contact in your database is scored based on the criteria you define here.

Before you define scoring criteria, take time to create a strategy based on sales team knowledge and experience. Make a list of ways prospects interact with you during the sales process and assign a value to each activity (see example). An activity that indicates a higher level of interest in your products or services merits more points than an activity that represents marginal interest.

Before you customize the score, you should also review your Tags to make sure:

- Tags have been created to represent the prospect's activity you outlined in your strategy.
- Tags are being added or removed from contacts automatically (e.g. through an action or campaign sequence ) or manually by your users.

## Setup

1. Go to **CRM > Settings** in the main navigation menu.
2. Go to **Contact & Company Settings** and click on **Scores**.

**Contact & Account Settings**

- General
- Task/Appt/Note Settings
- Tags
- Tag Categories
- Scores**
- Round Robins

**Account**  
Minimum Account # Length:

**Contact**  
Contact Types:

- Enter the number of points that represent an "ideal score" of 5 flames.  
The number of flames displayed on a Contact Record is based on the percentage of Ideal Score points accumulated. Note: An ideal score is comparable to an A+ or 100%. It is the score that indicates a contact has met enough of the scoring criteria to be considered a "hot" lead.

**Edit Score**

**Name & Status**

Name

Score is **On**     points equals 5 flames.

☐ Update recent activity

- Define the first criteria for the scoring rules.
- Select a *Tag* or *Activity* parameter.  
In the example below, we add a rule that increases the score by 2 points if a web form is submitted. We chose **Activity** as our first parameter.

Rules

Criteria

If the Contact's **Tags** contains Please select...

Activity

Tags

Save

1.29.3.0 leadScoringManageLeadScore 60 r

6. Choose **Contains** as the next parameter.

Rules

Criteria

If the Contact's **Activity** Please sel...

contains

doesn't contain

Save

1.29.3.0 leadScoringManageLeadScore 60 minutes role: pmna

7. Select **Web Form Submission** in the drop-down for the next parameter.

Rules

Criteria

If the Contact's **Activity** contains

Web Form Submission

Save

1.29.3.0 leadScoringManageLeadScore 60 minutes role: pmna4camp.web

8. Adjust the points and (optionally) set an expiration. We chose to increase the score by 2 points and expire this score in one month (4 weeks.)

The screenshot shows a configuration panel with two main sections: 'Points' and 'Expiration'. Under 'Points', there is a numeric input field containing the value '2' in green, with a small up/down arrow icon to its right. A mouse cursor is hovering over this icon. Under 'Expiration', there is a numeric input field containing the value '4', followed by the text 'Weeks'. To the right of 'Weeks' are two circular buttons with minus and plus signs. Below these sections is a light gray horizontal bar.

9. Click on the + icon next to the rule we just created to add another rule.

This screenshot is similar to the previous one, but the mouse cursor is now hovering over the plus sign button located to the right of the 'Expiration' field. The 'Points' field still shows '2' and the 'Expiration' field shows '4 Weeks'.

10. Choose **Tags** as the first parameter.

The screenshot shows a 'Criteria' section with a dropdown menu. The dropdown is open, showing three options: 'Please sel...', 'Activity', and 'Tags'. The 'Tags' option is highlighted with a dark gray background, and a mouse cursor is clicking on it. To the left of the dropdown, the text 'If the Contact's' is visible. Below the dropdown is a green 'Save' button. At the bottom right of the interface, there is a footer with the text '1.29.3.0 leadScoringManageLeadScore 60 minutes'.

11. Choose **contains** as the next parameter.



**Name & Status**

Name

Score is On ⚙️

points equals 5 flames.

☐ Update recent activity ⚙️

**Rules**

14. Click on the **Save** button to enable your changes.

**Criteria**

If the	Contact's	Activity	Please sel...
If the	Contact's	Tags	contains <span style="border: 1px solid gray; padding: 2px;">Newslette</span>

Save

1.29.3.0 leadScov

## FAQs

- **Question: After creating my scores, why don't they show up on a contact record?**
- **Answer:** After making changes to your lead scores, Infusionsoft may take up to 20 minutes to update all scores in your Infusionsoft account. The contact record will alert you that it is still updating.
- **Question: If someone submits multiple web forms will each form submission grant more points?**
- **Answer:** No. A web form submission will only be counted once.
- **Question: If I have two rules in the same contains box, do both need to be true, or only one in order to get the points?**
- **Answer:** Answer: Only one rule needs to be true in order to get the total points for that rule. If both are true, they will still only get the points you allot for that rule.

- Question: Can I define multiple scores in my Infusionsoft account?
  - Answer: Presently, you can only have one score per Infusionsoft account.
-