Set Up Lead Scoring In Infusionsoft

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.

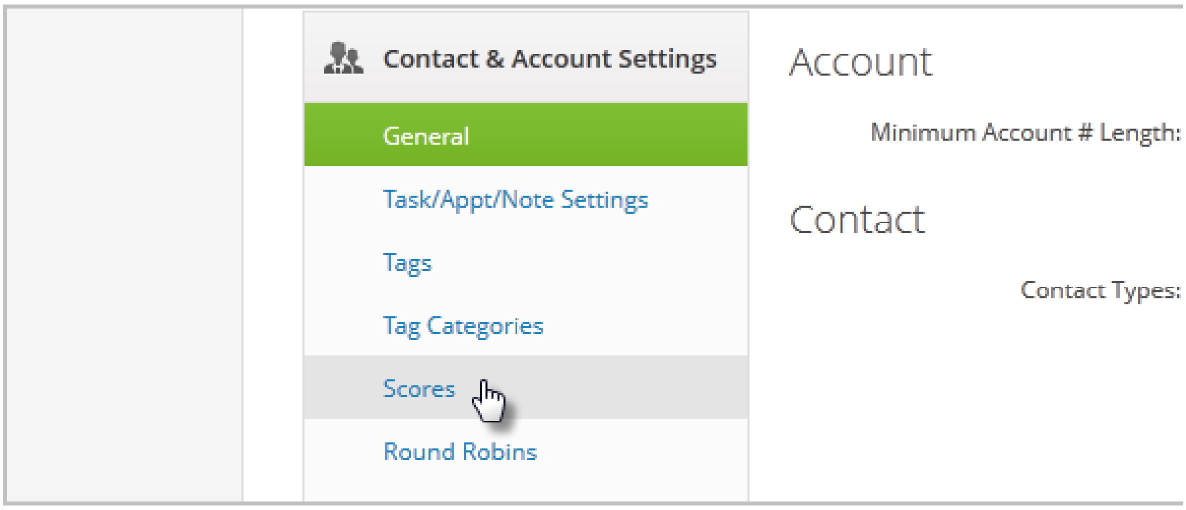
Before you customize the score, you should also review your Tags to make sure:

- 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.

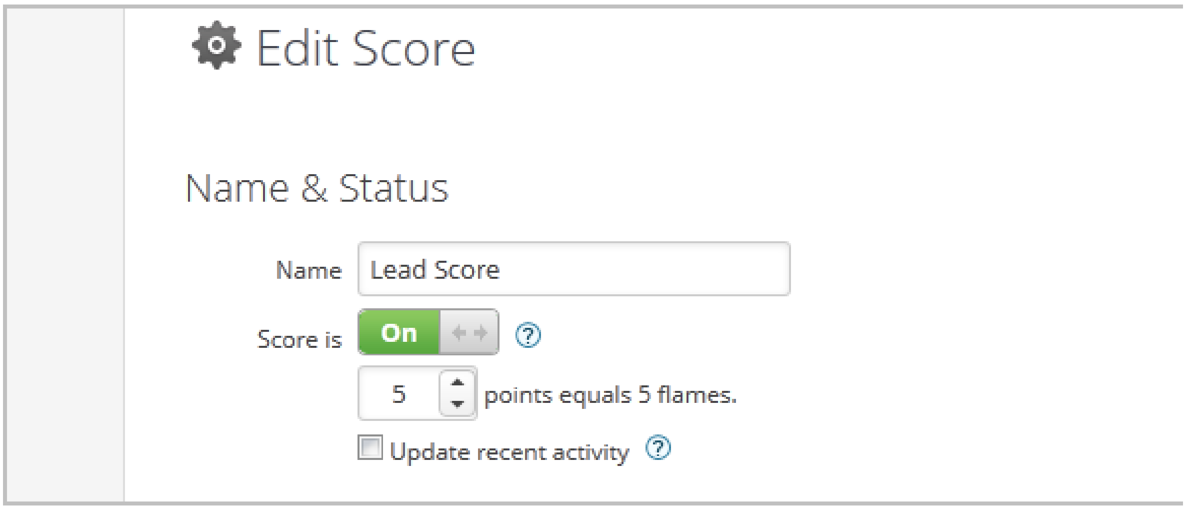
Setup

1. Go to **CRM > Settings** in the main navigation menu.

2. Go to **Contact & Company Settings** and click on **Scores**.

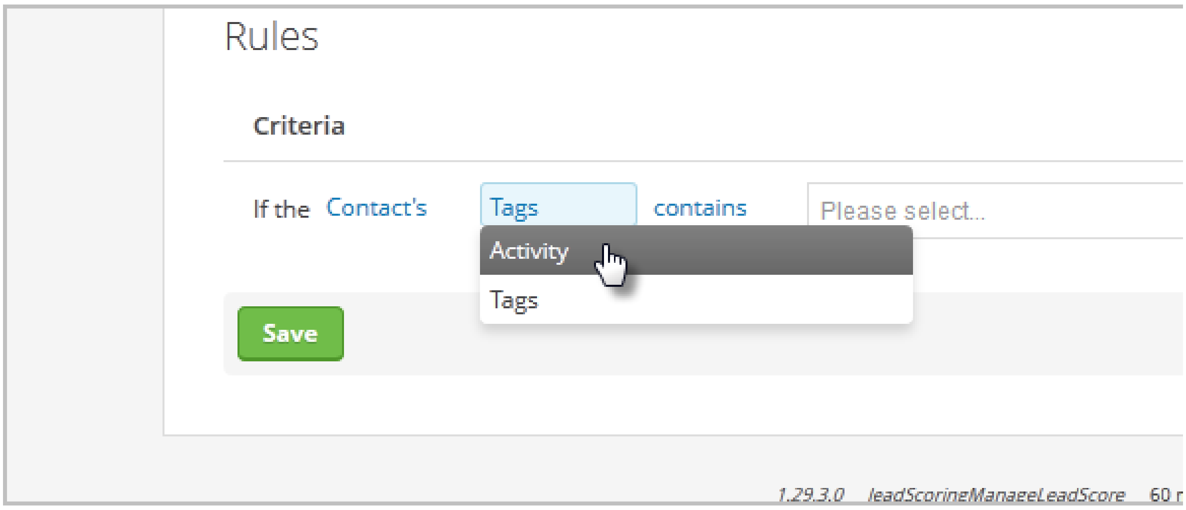


3. Enter the number of points that represent an "ideal score" of 5 flames.
   The number of flames displayed on a Contact Record is based on the percentage of Ideal Score points accumulated. Note: An ideal score is comparable to an A+ or 100%. It is the score that indicates a contact has met enough of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

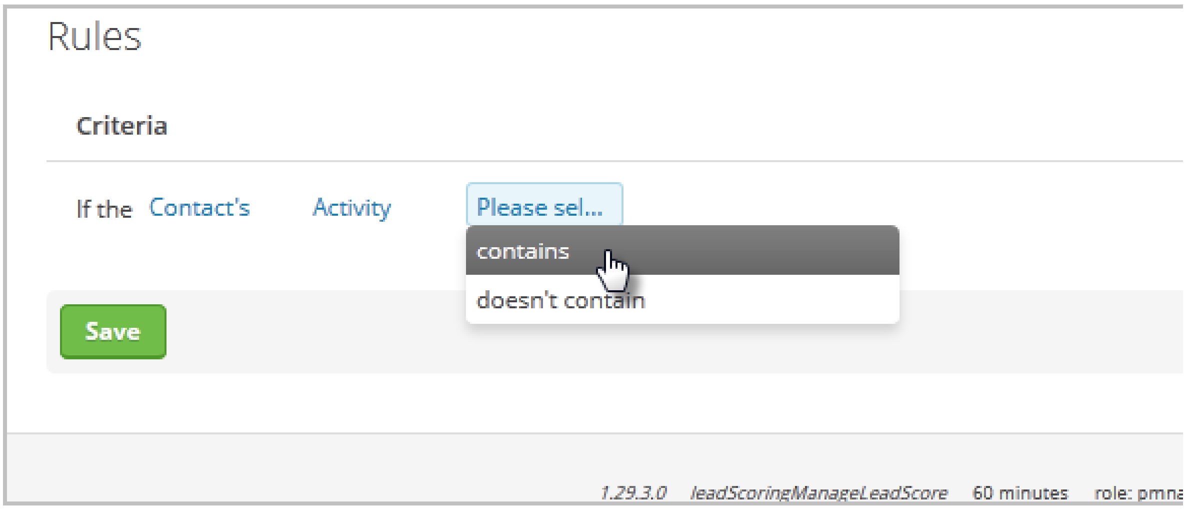


4. Define the first criteria for the scoring rules.

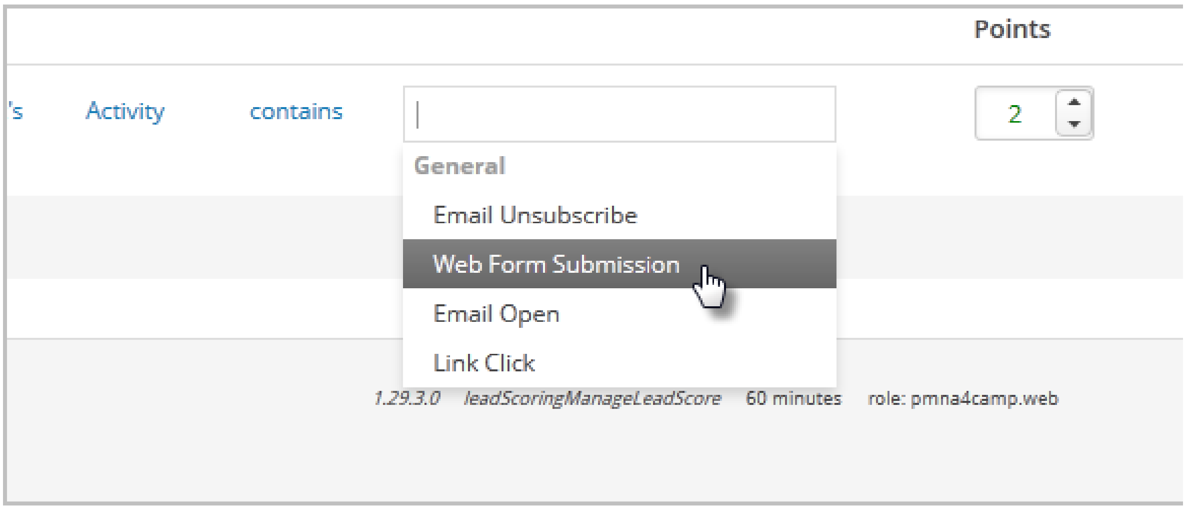
5. Select a *Tag* or *Activity* parameter.
   In the example below, we add a rule that increases the score by 2 points if a web form is submitted. We chose **Activity** as our first parameter.



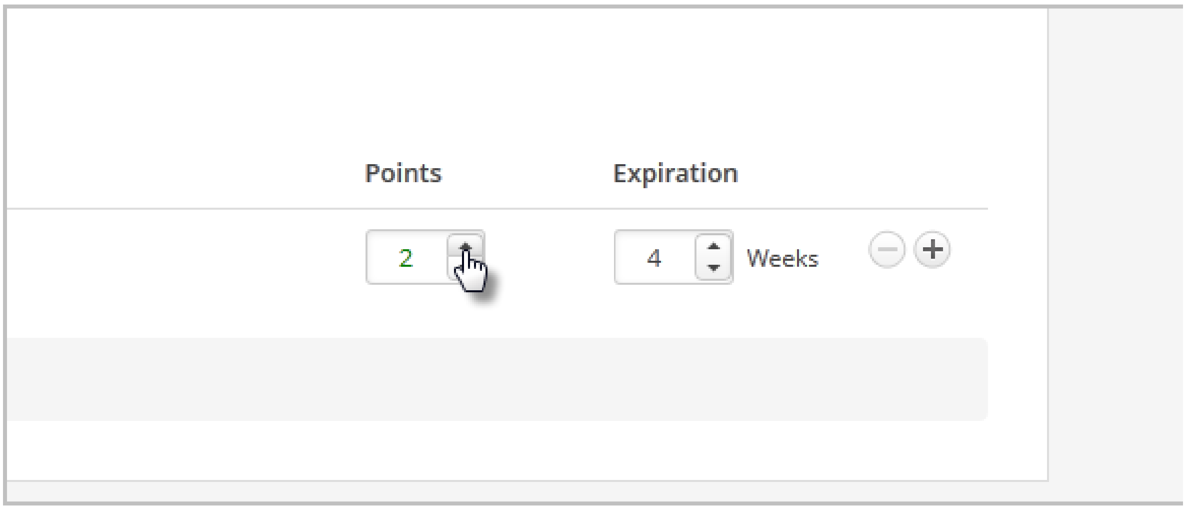
6. Choose **Contains** as the next parameter.



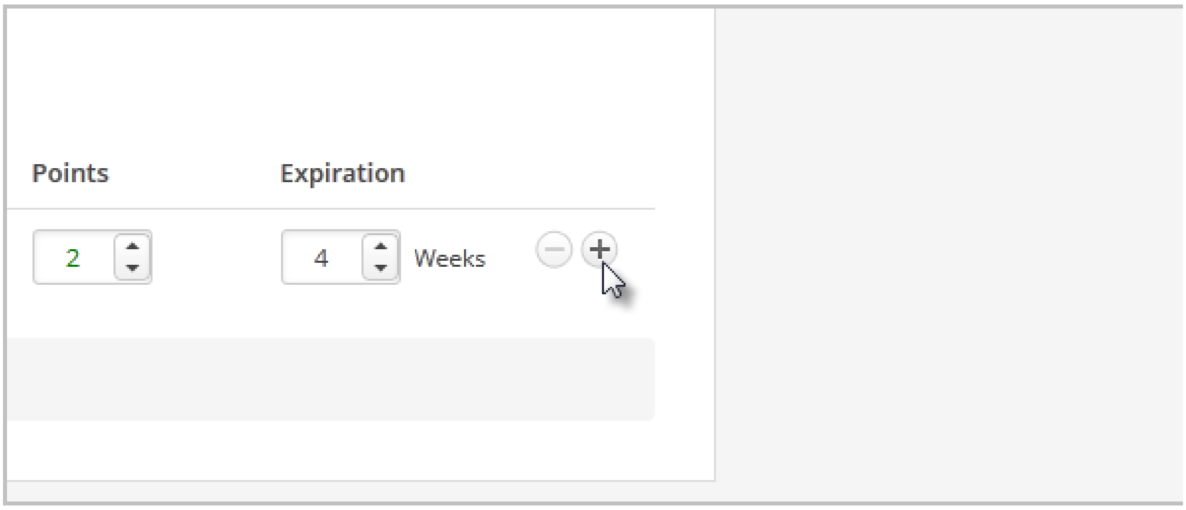
7. Select **Web Form Submission** in the drop-down for the next parameter.



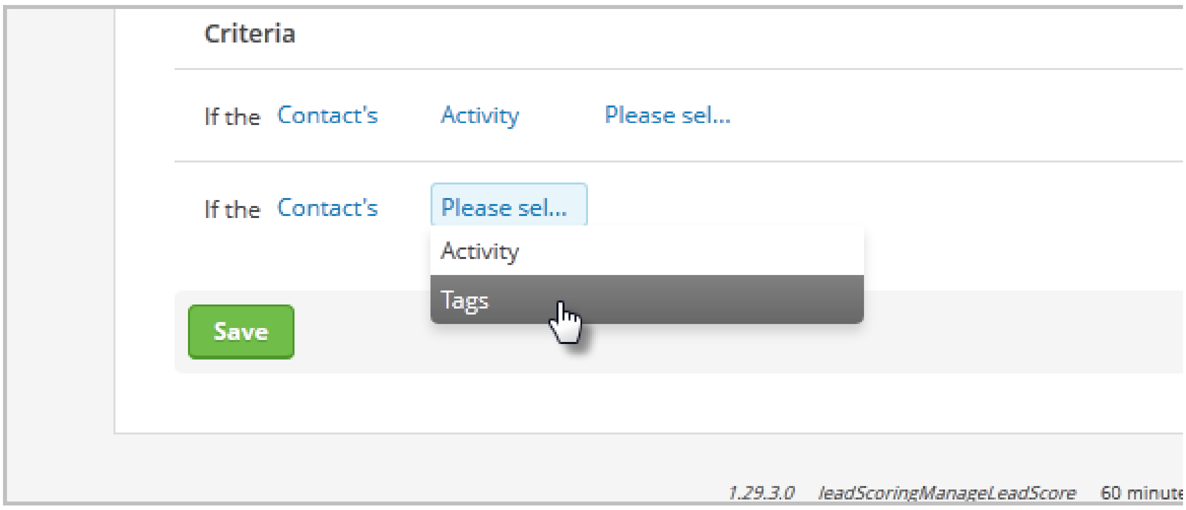
8. Adjust the points and (optionally) set an expiration. We chose to increase the score by 2 points and expire this score in one month (4 weeks.)



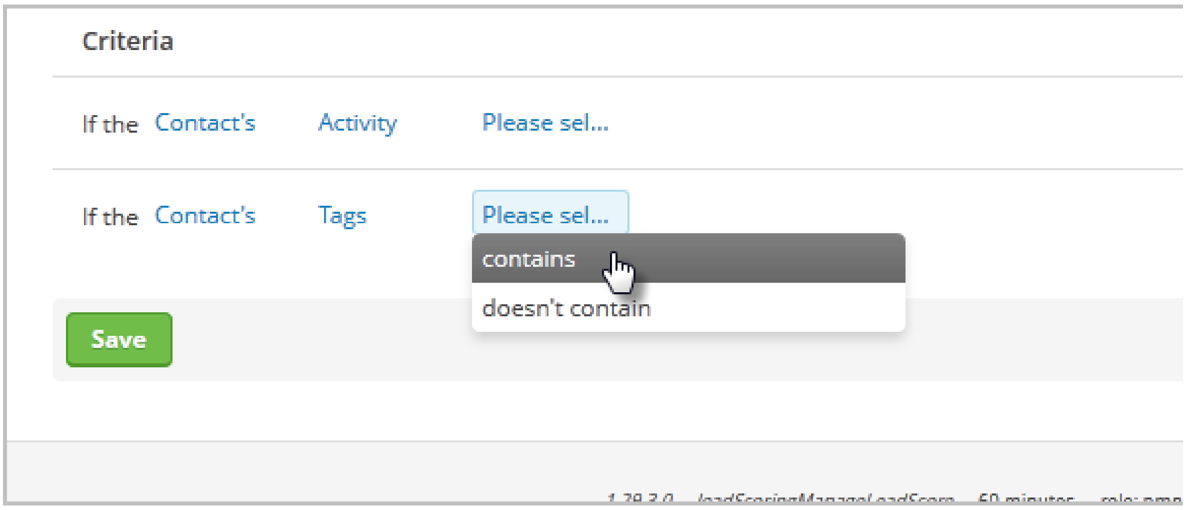
9. Click on the **+** icon next to the rule we just created to add another rule.



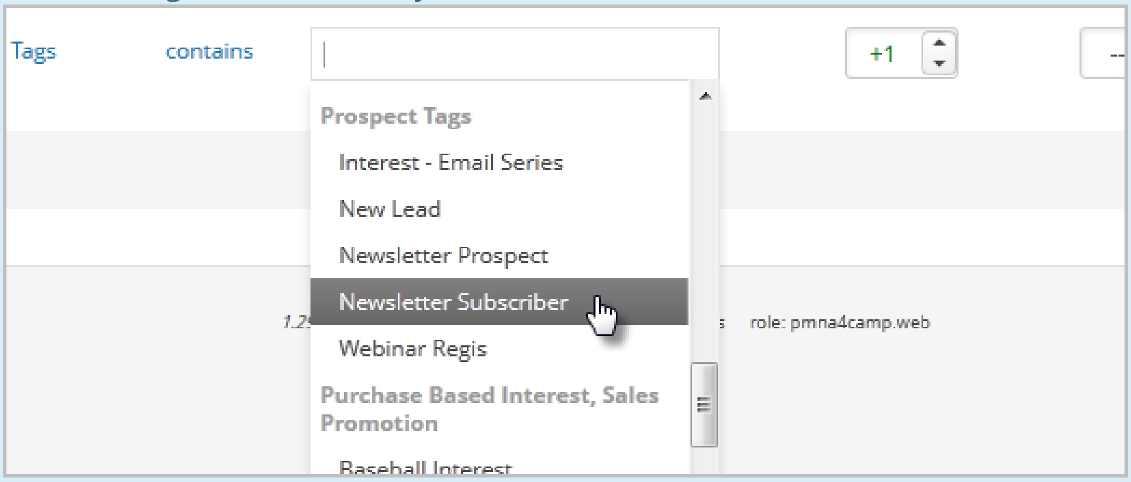
10. Choose **Tags** as the first parameter.



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



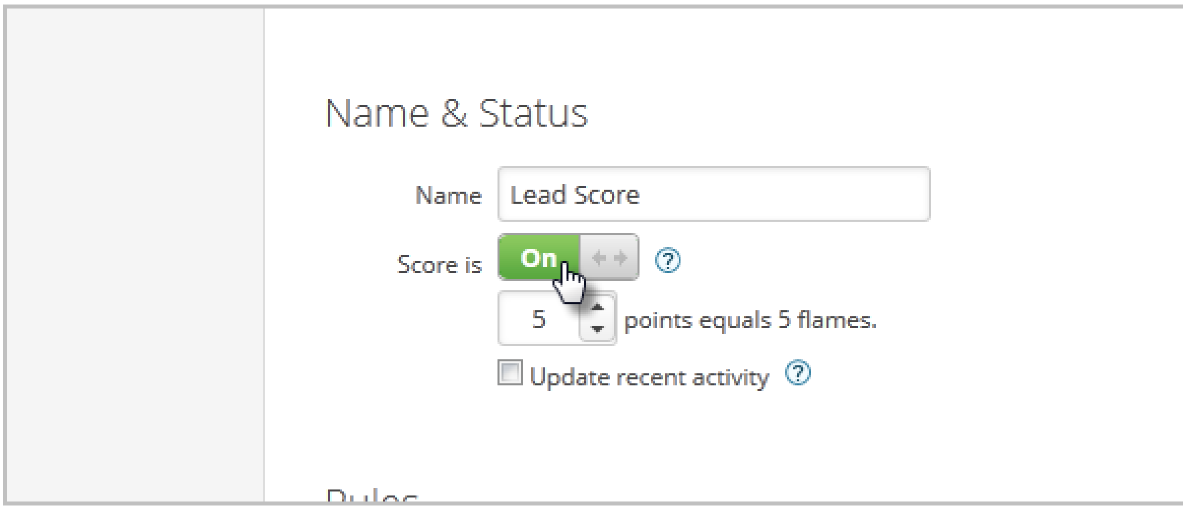
12. Select the tag(s) that will satisfy this rule.



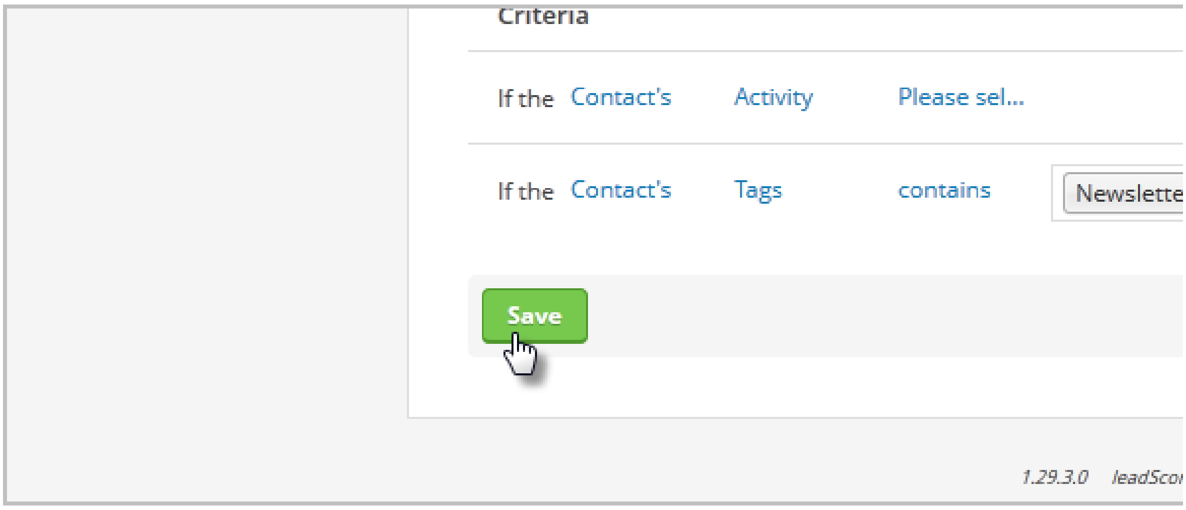
Multiple Tags

If you add more than one tag when defining one criteria line, the system will apply the points as long as the Contact record has at least one of the tags.

13. Be sure the Score is enabled by sliding it to the green *On* position.



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



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.