How-to-instructions on setting up lead scoring

Lead scoring allows for you to organize and prioritize leads based on specific information a lead has provided, or important event activity the lead has taken a part in.

SharpSpring enables you to define custom lead scoring parameters.

This article will provide an overview on defining and configuring lead scoring.

Configuring Lead Scoring

SharpSpring has different lead statuses. Leads can have scores attributed to them that, when paired with a lead's status, detail how a lead or contact is interacting with your business. The only lead statuses that do not display a score are the Contact and Customer lead statuses.

SharpSpring's scoring feature, called Lead Scoring, allows you to configure how to approach leads based on how they interact with your content.

To access and configure the Lead Scoring feature, do the following:

- In SharpSpring's top toolbar, click Contacts > Lead Scoring.
- Drag the sliders to the desired range in the Lead Score Ranges section.
- Modify point totals in the following Fit rule sections:

Section	Modification
Contact Information	Modify point totals for contact information data.
Persona	Click + Add Rule and modify point totals for persona rules.
Custom Attributes	Click + Add Rule and modify point totals for custom field data.

- Modify point totals in the following **Engagement** rule sections:
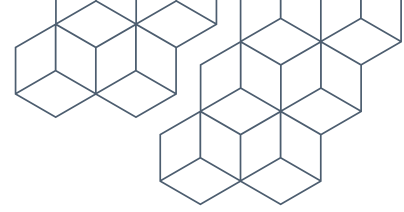
Section	Modification
Activity	Modify point totals for various platform features.
Social	Click + Add Rule and modify point totals for social media interactions.
Pages	Click + Add Rule and modify point totals for page visits.
Media	Click + Add Rule and modify point totals for media asset views.

Modify the following time settings in the **Activity and Decay Timing** sections:

Section	Modification
Lead Activity Period	Click the drop-down menu and choose the desired month range.
Lead Score Decay	Click the slider to toggle the Lead Score Decay feature.
Rate of Decay	Enter the number of weeks for the half-life decay.

Click Save and Rebuild All Lead Scores.

Lead Score Ranges

Lead Score Ranges is a scoring feature that you can set to determine what lead score makes for a great lead, a good lead, or a bad lead.

Using the sliders adjusts the lead scores to represent lead values. Once these sliders are set, you can see the number of leads you have that fit the desired lead score range.

Ranges in the graph will not populate if less than 1% of the total database is within that range. It will only populate after 1% of the total has the lead score in the range.

Lead Scoring Criteria: Fit

The Fit section is where rules are set to measure how well a lead aligns to your target audience based on persona, custom attributes, and information.
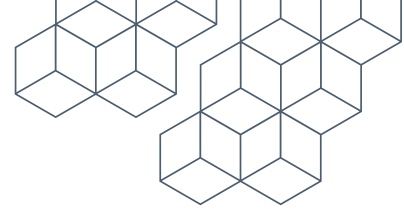
Criteria	Description
Persona	Configure how many points are attributed when a lead has a specific persona.
Custom Attributes	Configure leads based on custom lead fields.
Contact Information	Configure lead scores based on a contact's personal information.

Lead Scoring Criteria: Engagement

The Engagement section is where rules are set that reflect how engaged a lead is with your content. This can provide a way to sort out which leads are most engaged.

Criteria	Description
General Activity	Configure leads based on more common actions.
Social	Configure leads based on interactions with a social profile.
Media	Configure lead scores based on when the lead interacts with media content, such as an image or video.
Pages	Configure lead scores to provide points to a lead based on which webpages a lead visits.

Activity and Decay Timing: Lead Score Time Settings

Keep lead scores updated by disregarding old engagement events with your Lead Activity Period, and use the Lead Score Decay feature to set the timeframe for when the score is half as valuable.

Setting	Description
Lead Activity Period	Choose the time frame after which SharpSpring will ignore activity that led to incremented lead scoring.
Lead Score Decay	Choose the half life of lead scores.
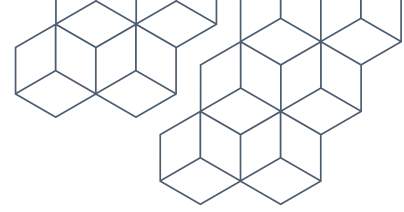
Lead Score decay is a natural event, not a save event. As such, decayed lead scores will not be trigger for dynamic lists or automation. Lead scores that are updated through lead actions (such as a site visit) will fire. However, if someone's lead score naturally decays past a threshold designated in a trigger, then the trigger will not fire.

Lead Score Calculations

Based on the your custom configured scoring rules, leads will receive incremental or decremental points based on those rules.

For example, if in your Engagement section you have a page rule where someone visits the page http://www.example.com/request-service, the lead may receive 10 points. The points will then be reflected on the Lead Score.
At any time, you can review the total components of a specific contact's lead score by clicking on their score in the Contact Manager.
Lead Scores calculate:

When a lead has yet to be scored. When a new lead is added, their information and event activities are indexed against the Lead Score settings, and an initial lead score value will be calculated.
On the lead's last event activity date (such as a site visit or an email click), or the date at which
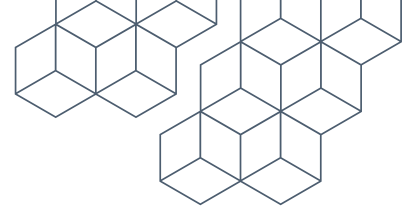
Lead Score Story

Clicking the overall Lead Score of a lead in the Contact Manager will open that lead's Lead Score Story. The Lead Score Story displays information on the various interactions that a lead has with your content.

These interactions are displayed individually across different metrics. In addition, the Lead Score Story shows the current Lead Score for the lead, the Lead Score without decay, and the overall percentile that the lead's individual Lead Score is in when compared to your other leads.

To access a lead's Lead Score Story, do the following:

- In SharpSpring's top toolbar, click Contacts > Contact Manager.
- Use the Contact Manager's search features to filter leads.
- Locate the desired lead.
- In the Lead Score column, click the lead's Lead Score.

The Lead Score Story details the various ways that the lead has interacted with your content. The available parameters are as follows:

Parameters	Description
First and/or Last Name Provided	The lead entered their first or last name in a form. The lead has a first name, a last name, or both, and the respective fields in the form are not blank.
Title Provided	The lead entered their title in a form. The lead has a specific title, and the title field in the form is not blank.
Email Provided	The lead entered their email in a form. The lead has an email address, and the email address field in the form is not blank.
Forms Completed	The lead has completed a form.
Email Clicks	The lead has clicked through an email.
Media Views	The lead has viewed Media Center assets with trackable links.
Social Interactions	The lead has interacted with a published social media post. Interactions include clicking on links or images within the post, as well as utilizing the individual social media platform's interaction features for the post.
Pages Visited	The lead has visited landing pages or blogs.
Campaign Pages Visited	The lead visited any page that is somehow associated with a campaign. These may be referring pages, or those pages with UTMs or wildcards.