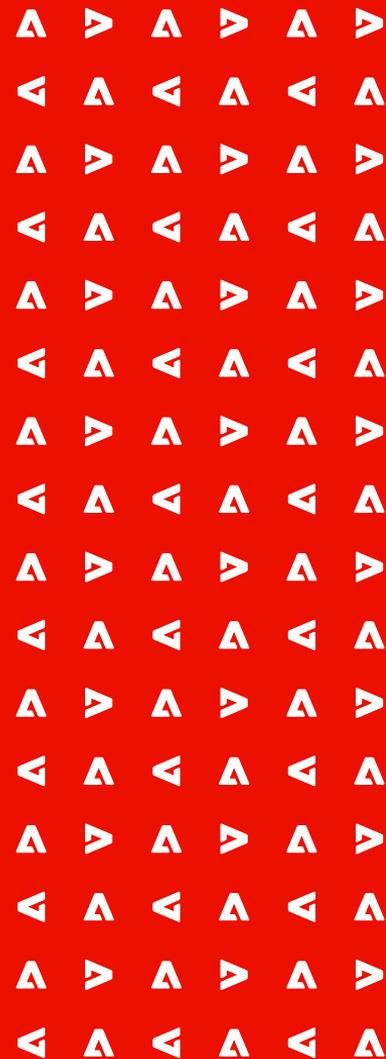




# Person Scoring Mastery with Marketo Engage: Localized Nuances in a Global Framework

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# Introductions



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# Principles of scoring



## Agreement between Marketing & Sales

- Relevant individual data points of a good lead
- Relative worth compared to each other
- Minimum total score to hand over a lead to Sales team



## Evaluate the model periodically

- Which leads converted successfully?
- What was their overall score before the handover?
- Which data points were key drivers for success?
- Does the scoring model need an update?

# The basics of scoring in Marketo Engage

Demographic Score + Behavior Score = Person Score

how **interesting** a person is  
to your company

how **interested** the person  
is **in** your company

# Typical topics to score on

## Demographics

Industry  
Company size  
Job role  
Seniority  
...

## Behavior

Email clicks  
Web visits  
Events attendance  
Chat interaction  
Social interaction  
...



But wait...  
My regional teams  
focus on different  
market segments.

# When is local flexibility required?



- **Industries:** The economic landscape differs per country
- **Communication channels:** Different platforms in use per country
- **Stakeholders:** Different relevant job roles per product type

# The solution: Scoring matrix

Demographic matrix	Priority 1	Priority 2	Priority 3
High values	20 pts	10 pts	7 pts
Medium values	10 pts	7 pts	3 pts
Low values	5 pts	3 pts	1 pt

## Things to consider when defining your scoring matrix:

- ❑ Set up a different matrix for demographic and behavior elements
- ❑ Which topics remain global and which can be adjusted locally?
- ❑ Number of priorities:  
How many different topics are you asking for the local team's input on?
- ❑ Number of value options:  
How many individual values are you rating within your topics?
- ❑ Individual values:
  - Align relative worth with global scores
  - Define common scenarios and test your overall scoring for them

# Collecting input from markets

Is a market allowed to skip a topic?

Local option to set topic priority

Local option to set value levels

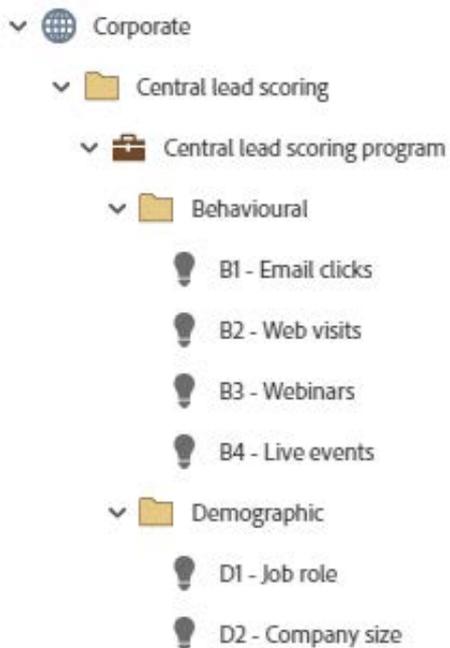
Yes/No	Demographic / Behavioral	Topic	Priority	Values	Score
REQUIRED	Demographic	Industry	Prio2	Technology	High
				Fashion	High
				Retail	Medium
				Manufacturing	Medium
				Healthcare	Low
				...	Low
Yes	Demographic	Company size (employees)	Prio3	>1000 employees	High
				250-999 employees	Medium
				1-249 employees	Low
No	Behavioral	Page visits on your local website	Prio2	Product information pages	Low
				Pricing pages	Medium
				Demo request pages	High

Sometimes local individual values are required



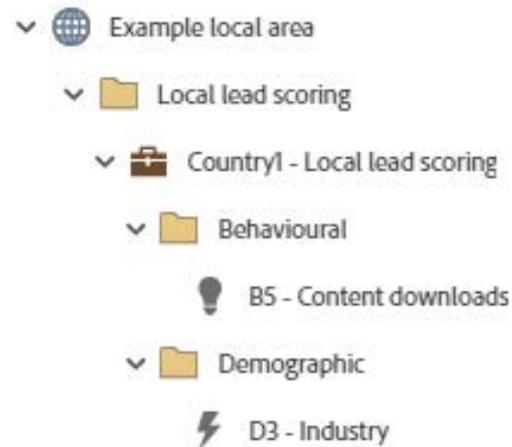
# Set this up in Marketo Engage

# How to set this up in Marketo Engage



## Create two versions of the scoring program:

1. A central program that runs all scoring that cannot be updated locally.
2. A local copy with the scoring elements that are configurable.

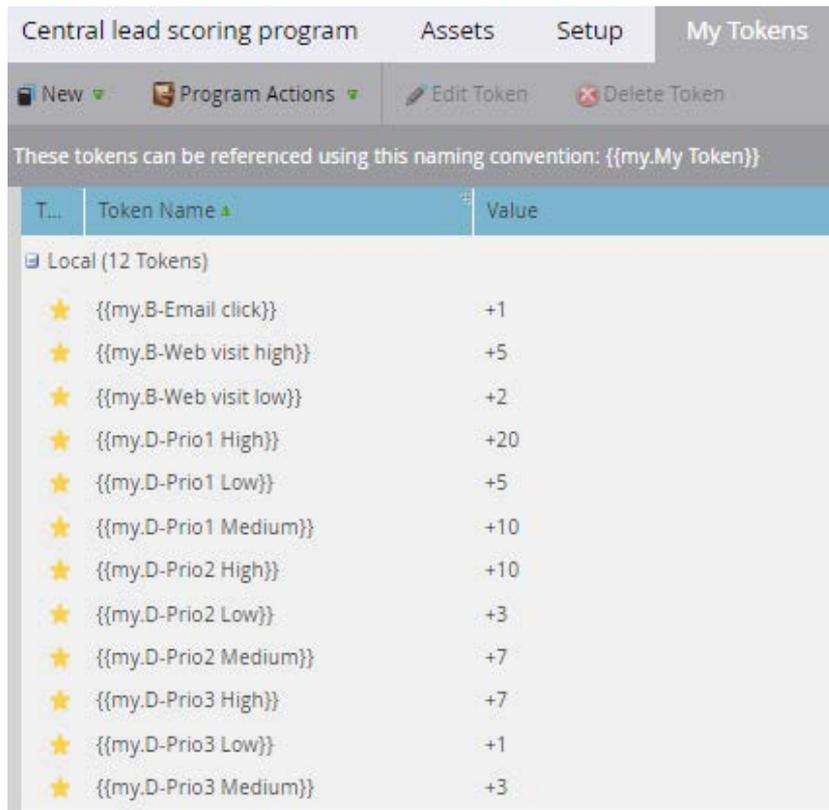


**Champion Tip:** Not sure where to start? You can import a scoring program from the import library [here](#).

# How to set this up in Marketo Engage(cont.)

## **Champion Tip:**

Set up your scoring values as tokens within your program.



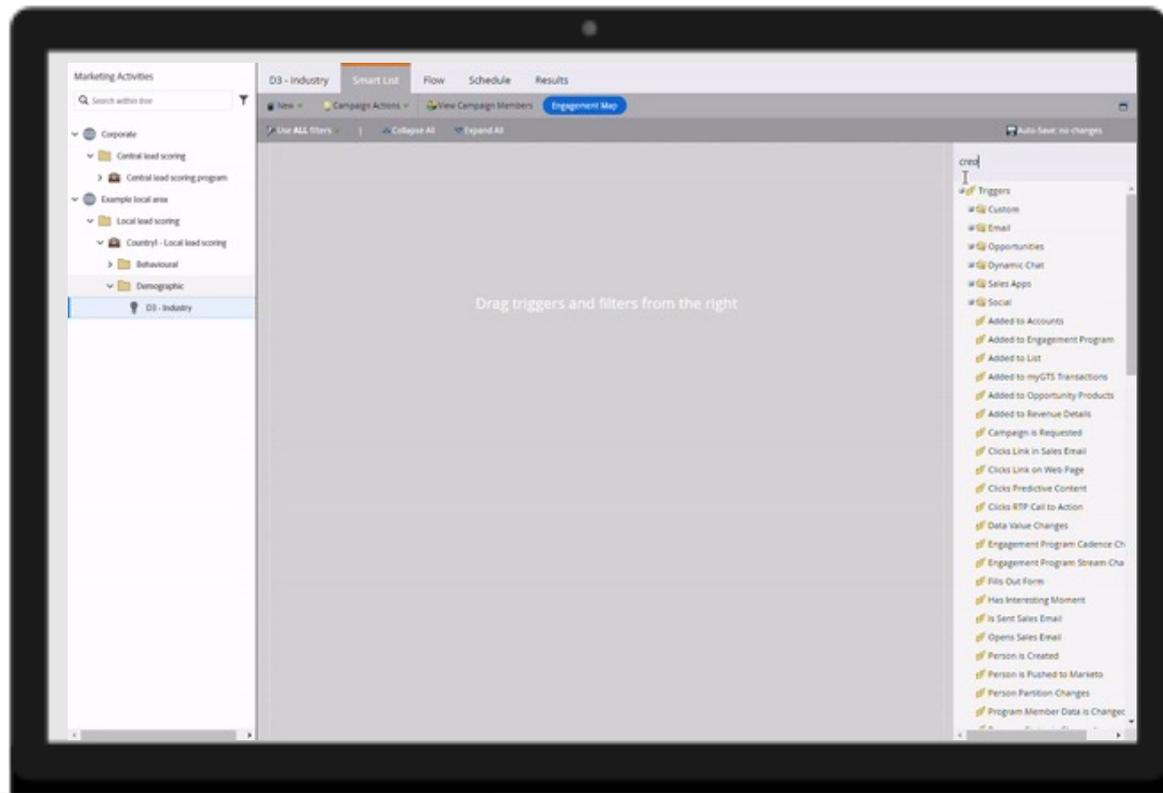
Central lead scoring program    Assets    Setup    My Tokens

New    Program Actions    Edit Token    Delete Token

These tokens can be referenced using this naming convention: {{my.My Token}}

T...	Token Name	Value
Local (12 Tokens)		
★	{{my.B-Email click}}	+1
★	{{my.B-Web visit high}}	+5
★	{{my.B-Web visit low}}	+2
★	{{my.D-Prio1 High}}	+20
★	{{my.D-Prio1 Low}}	+5
★	{{my.D-Prio1 Medium}}	+10
★	{{my.D-Prio2 High}}	+10
★	{{my.D-Prio2 Low}}	+3
★	{{my.D-Prio2 Medium}}	+7
★	{{my.D-Prio3 High}}	+7
★	{{my.D-Prio3 Low}}	+1
★	{{my.D-Prio3 Medium}}	+3

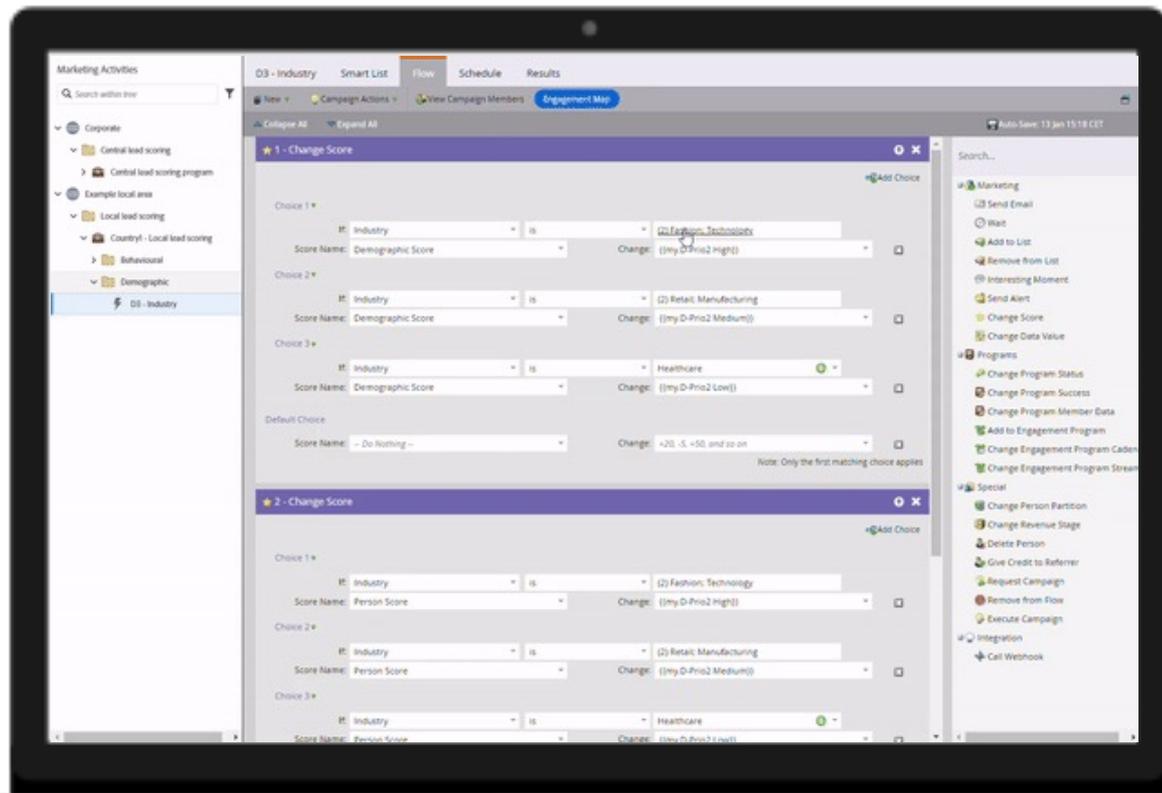
# Adjusting your local Smart Campaign



## Key focus point:

1. Set up your triggers and filters to score only on the first capture of data.

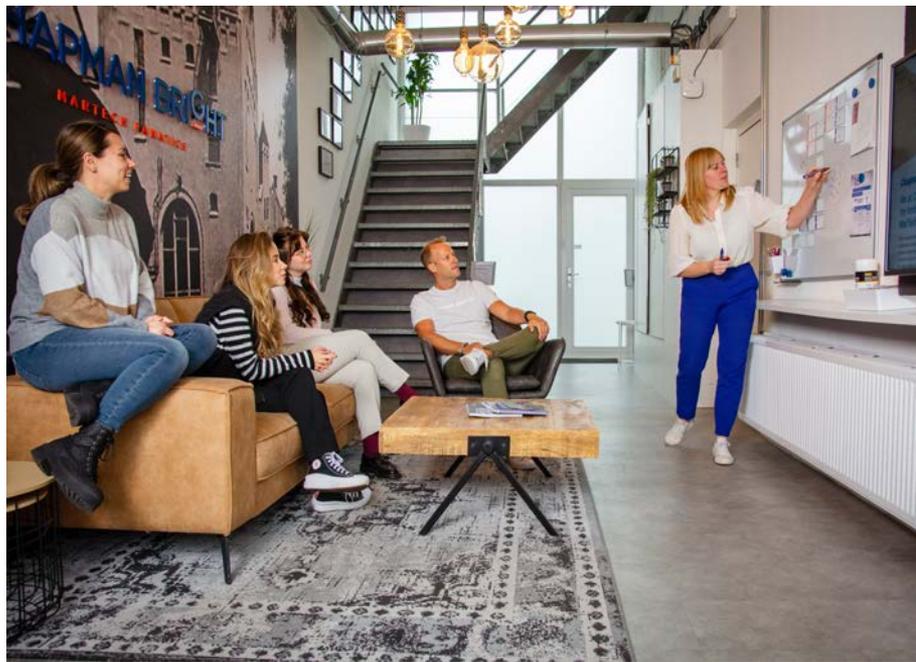
# Adjusting your local Smart Campaign(cont.)



## Key focus points:

2. Make sure your choices are mutually exclusive.
3. Make your updates in both flow steps so Person Score is updated in an identical way to Demographic Score.

# How did we fare in DHL with this model?



- Almost fully deployed in all 139 markets.
- Vast majority of markets made at least minor adjustments to their scoring model.
- Good trust level in local teams.
- Evaluating the model is not possible yet, as initial data is still building up.

# Key Takeaways



Ensure your lead / person scoring model is consistent throughout your organization.



Balance this with local relevance by allowing for adaptations based on a clear matrix.



Create your overall program first - Then separate it into a local and a global version.



Naming conventions matter, here as well. Use consistent token and smart campaign names



Evaluate your model periodically, both on a global and a local level.

## Poll:

On a scale of 1-5, how prepared do you feel to implement changes or best practices for local flexibility based on the content?

- 1 not at all prepared
- 2 slightly unprepared
- 3 slightly prepared
- 3 prepared
- 4 extremely prepared



# Take the next step today.

## Don't have a scoring model in place yet? Here's how you can get started:



Do this [lead scoring exercise](#) together with your sales team.



Import the scoring program from Marketo Engage's [Program Import Library](#).



Set up your tokenized scores in the Program Tokens.



Build out your Smart Campaigns to cover all scoring elements.

## Already have a scoring model?



Check when it was last evaluated.



Monitor conversion statistics over time and between different markets / product lines.



Review and update your model periodically, building in local flexibility if needed.

# Appendix

- [Person/Lead scoring exercises](#)
- [Marketo Library lead scoring program](#)
- [Adobe Summit session from Champions on Lead Scoring](#)
- [Inspiration on scoring elements to include in your model](#)
- [A Champion's take on lead scoring on Marketing Nation Community](#)

