

How to Tame Category Scoring to Produce Quality MQLs

INTERMEDIATE | ADMIN



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FACTS



What are scoring categories?



VS



Scoring Categories

[+ Add Scoring Category](#)

NAME 	START DATE	FOLDERS	CREATED	ACTIONS
A&E Scoring Category	All historical activity	 /FACTS/A&E	Nov 4, 2019 2:39 PM	
Advanced Accounting Scoring Category	May 19, 2020	 /FACTS/Advanced Accounting	May 19, 2020 4:28 PM	
FACTS Ed - Coaching	Apr 22, 2021	 /FACTS/1_FACTS Ed Coaching	Apr 22, 2021 2:42 PM	
FACTS Ed - EANS	Apr 22, 2021	 /FACTS/2_FACTS Ed EANS	Apr 22, 2021 2:42 PM	
FACTS Ed - ESSA	Apr 22, 2021	 /FACTS/3_FACTS Ed ESSA	Apr 22, 2021 2:43 PM	
FACTS Ed - Inst. Services	Apr 22, 2021	 /FACTS/4_FACTS Ed Inst Services	Apr 22, 2021 2:43 PM	
FACTS Ed - PD	Apr 22, 2021	 /FACTS/5_FACTS Ed PD	Apr 22, 2021 2:43 PM	

Scoring categories

Where it shines best

- Multiple companies in a Pardot business unit that go to different sales people.
- Multiple products that go to different sales people.
- You do NOT allow prospects to have the same email address.
- You have repeating engagement studios free.
- You want a dash of chaos in your world.



Scoring categories

How it's different than the overall score

- Scoring categories only pays attention to assets in a folder for scoring.
- Overall scoring ignores what's in the scoring category folders.
- If you remove something from a scoring category folder (i.e. archive an email or old engagement studio), it drops every prospect's score that was associated with that asset.
- You can not manually change a person's category score or adjust with importing a file.
- You can only adjust a scoring category through automation.
- You do not have the luxury of a "Change scoring category to X" function.

Wisdom

If you can avoid the scoring category, live a happy and content life without it.



“

Still here? Well, aren't you the adventurous one.

Let's go!

”



Secrets to success

Problem	Solution
You need a way to identify a marketing qualified lead (MQL) that's ready for sales to look at.	Create MQL automation for every scoring category.
You need to suppress someone who already has the product or send them to your customer service team.	Create a dynamic list of who is a current client with that product to use as a suppression for MQL creation.
You need a way for someone to automatically reduce their score to re-qualify as a MQL in the future.	Create repeating engagement studios for every scoring category to reduce scoring. (Note: limited # of repeating engagement studios)

MQL automations & Asset is Active list

Identify what's ready for sales

Rules

- | | |
|-------------------------------------|--|
| Prospect score for Scoring Category | Prospect's score on Category TMG Scoring Category is greater than 149 |
| Prospect list | Prospect isn't on list Tuition Management Asset is Active |
| Prospect list | Prospect isn't on list Disqualify - TMG |
| Rule Group | Match any <ul style="list-style-type: none">Prospect default field: 'Email' doesn't contain 'factsmgt.com;nelnet.net;test'Prospect default field: 'School Name' doesn't contain 'FACTS;Nelnet;test' |

Actions

MQL automations

And automatically reduce score.

Actions

Add prospect to list [Nurture - TMG](#)

Change prospect custom field value [MQL Date](#) to 'today'

Increment prospect field value [Increment MQL Counter](#) by 1

Change prospect custom field value [MQL - TMG - date stamp](#) to 'today'

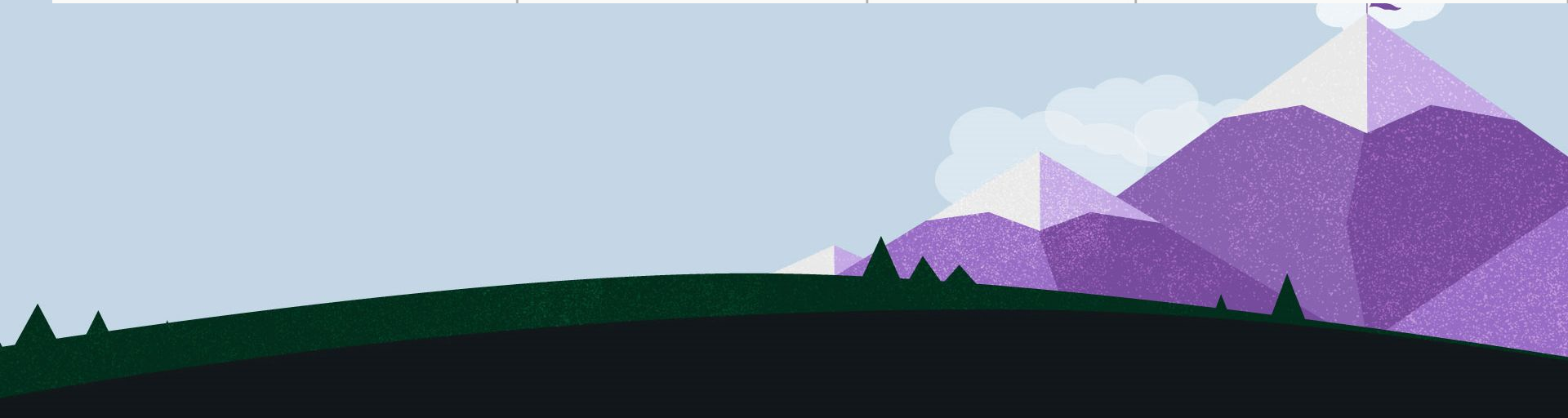
Increment prospect field value [Increment MQL - TMG - counter](#) by 1

Change prospect custom field value [Most Recent MQL](#) to 'TMG'

Passing onto sales

Most Recent MQL Reason

Account Name/Company	Due Date	Last Modified... ↓	Most Recent MQL Reason
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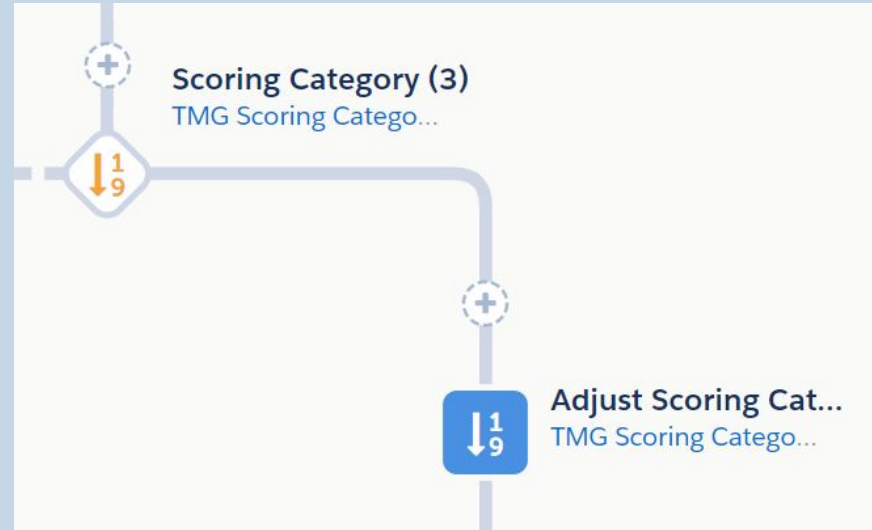


Reduce score

Utilize engagement studio to cut a score in half (example: to 75 pts)

ES Logic:

- Is the person on the “Nurture - TMG list”?
- A TMG category score higher than 900? -825.
- A TMG category score higher than 800? -725.
- A TMG category score higher than 700? -625.
- Repeat pattern until...
- A TMG category score higher than 100? -25.
- A TMG category score higher than 100? -25.
- A TMG category score higher than 100? -25.
- A TMG category score higher than 90 -15.
- A TMG category score higher than 80 -5.



Recap: Secrets to success

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Thanks for listening!



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