How-To Optimise MCAE (Pardot) Scoring Rules And Categories

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About me

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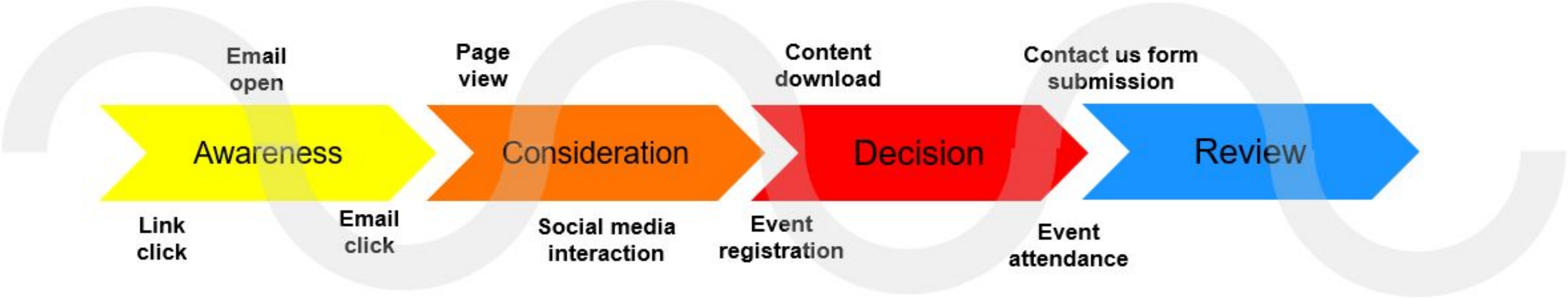
Wärtsilä – Finnish company, founded 182 years ago
Wärtsilä is a global leader in innovative technologies and lifecycle solutions for the marine and energy markets.

Agenda

- Introduction to MCAE scoring and scoring categories
- Identifying and ranking key touchpoints across the customer journey
- Developing a customised scorecard for specific business needs
- Technical setup – your lead strategy
- Reviewing this lead strategy

MCAE Scoring = interest and intent

- A score in MCAE is a numerical figure assigned to a prospect once they engage with tracked marketing activities.
- The score shows **implicit interest** in a product, solution or service offered by your business.
  - Meaning this is information used to assume or suggest a prospects' interest – **NOT** directly expressed by the prospect
- The score itself can increase (and/ or decrease) whenever they engage with marketing activities (providing they are tracked).



***MCAE offers a scoring system (scoring rules) by default which can be customised for your specific business needs and lead generation strategy.

A prospects score can be changed by:

1. Modifying scores during imports
2. Changing a prospects score manually
3. Resetting a prospects score to Zero

MCAE Grading = prospect value

- The Grade is a letter assigned to a prospect based on their profile – and how well it matches your businesses set criteria.
  = <u>Your ideal customer profile</u>

- The Grade measures **explicit information** provided by the prospect such as, **job title**, **location** and **company size**.
  - Use progressive profiling in forms to capture more prospect data

- A Grade runs from **F** to **A** – increasing in increment of thirds so F , F+ , E- , E , E+ , D- etc to A

- All **NEW** prospects enter MCAE with a <u>**grade D**</u> by default.

How are they used together?

The score is used to help us understand and determine the prospects level of interest – **Implicit information**

➕

The Grade is used to measure how interested we should be in the prospect – **explicit information based on the prospect profile**

Scoring & Grading

High score + **High grade** = a highly interested prospect, who is of high value/ importance to your business

- You will be use both to identify likely prospects that could be potential leads.
- The Grade and score are calculated independently.
- A lead should only be generated when both the prospect **Score** and **Grade** meet the requirement you set.

How can we optimise this for our specific business needs?

Score Card – Scoring rules

Based on a MQL threshold score of 100

- The score card should reflect the touchpoints you want track and score accordingly. Aggregating towards an overall score or scoring category.

Ask yourself…what are we currently tracking, what aren't we tracking and what should you be? (start small!)

- You are trying to identify touchpoints that are the most influential and generate the most engagement.
- Rank webpages with the same methodology (Page actions)

The task = <u>*isolate touchpoints or engagements across a customers' journey that impact the buying decision process.*</u>

How to do this?

1. Map all of the touchpoints you want to track (can any be grouped?)
2. Rank the touchpoints – based on influence and volume of engagement
   - Utilise audits, reports and prospect activity data
   - If you have activated **Engagement history in Salesforce** you can view activity on the lead and contact level
3. Apply an appropriate score for each touchpoint

Scoring Rules

Custom Redirect Click	5
Email Open	8
Event Checked In	20
Event Registered	15
File Access	5
Form Handler Submission	15
Form Submission	15
Page View	8
Webinar Attended	20
Webinar Invited	5
Webinar Registered	15

Scoring Categories

- Scoring categories can provide your business with very powerful scoring segmentation.

- You can use scoring categories with folders—by connecting the two, all content and activities related to that folder are scored to that specific category.

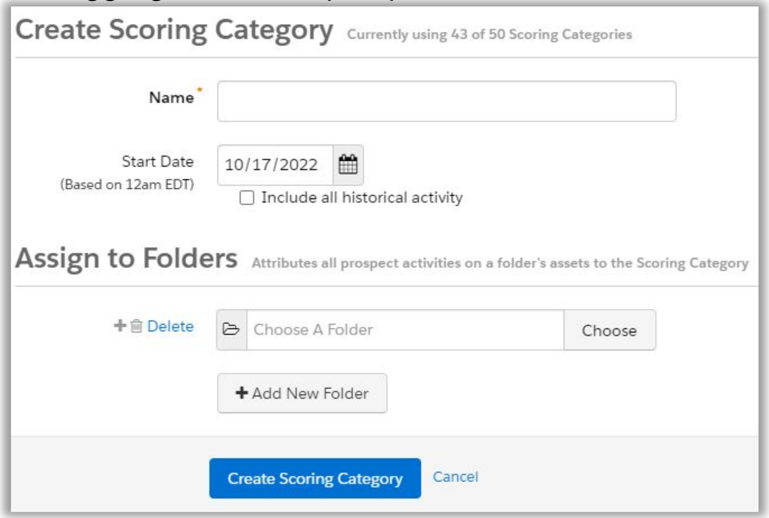
NOTE – when categories aren’t tied to a specific folder the category score must be added via a completion action.

- Scoring rules that don’t have a category and folder associated are aggregated to the prospect overall score

- You **DON’T** need a category for everything!

Key considerations:

1) Scoring category updates sync with Salesforce approximately every 15 minutes.
2) Only 50 categories
3) Scoring categories can be manually edited from prospects records
4) Aren’t supported with person accounts
5) Are included with full prospect csv. Reports



Navigate to: *Settings/scoring/Add scoring category*

Scoring Categories in practice

First look at your existing business structure and product/ service offering or portfolio.

So, say you work for an automotive company, selling a range of vehicles from **hatchbacks**, **saloons**, **coupes** and **SUV's**.

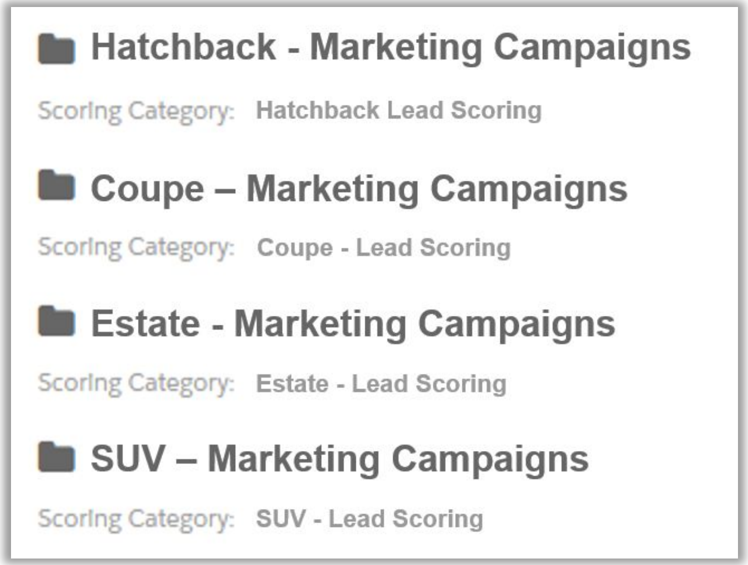
Suggested categories:

1) Hatchback
2) Saloon
3) Coupe
4) SUV

*** Are the journeys and decision making different for each category?

Benefits over an overall score approach:

- As categories allow you to score prospects on more than one product it's easier to identify and determine the level of interest per category.
- Cross-selling and upselling opportunities
- More granularity when analysing prospect activity for lead qualification/ conversion



Remember

- A prospects overall score can be reset (without impacting a specific scoring category).

How can we optimise this for lead generation strategy?

Technical setup – the lead strategy

Choosing the right automation tool = Automation Rules vs Engagement programs

Automation Rules

Key considerations:

- Starts in a paused state for the user to review before starting
- Depending on what tier of MCAE you have purchased you will have a limited number of automation rules (50-150)
- Advisable to have **one Automation rule per category** to reduce complexity (less to go wrong!)
- Finish previewing before starting!!

Engagement Programs

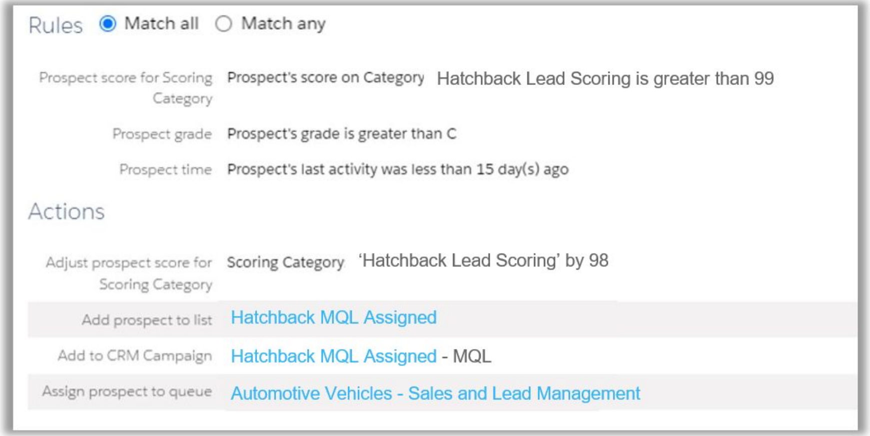
Key considerations:

- Start in a paused state
- Utilise dynamic lists to look for prospect that match your desired criteria (score + grade)
- Depending on what tier of MCAE you have purchased you will have a limited number of repeat engagement programs
- Max of 300 steps per engagement program
- Test your program before starting!!

Remember -*You'll need to specify if these actions are to repeat and if so, how often?*

Technical set up – Lead Criteria

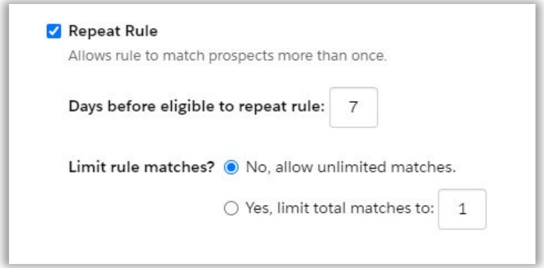
Now set your criteria, who are the kind of prospects that you want to push for qualification?



Who shouldn't be considered a lead?

- Competitors, job seekers, suppliers etc

How often should a prospect repeat the action?



Who in your organisation is going to handle the leads?

- A queue
- Or a specific user

How is your Org sync with Salesforce?

- Is contact and lead creation enabled?
- Or is task creation the only option?

Does a new lead need to be created or should a task be assigned?

- New lead creation
- Tasks (remember, tasks don't have a lead path/ stages)

Is the prospect score reset?

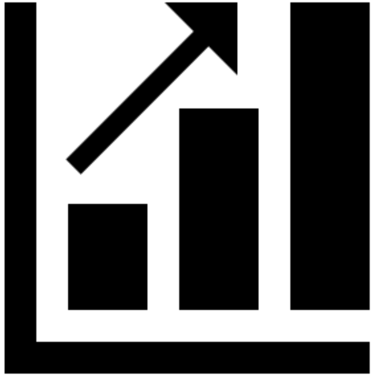
Remember! *actions are executed from top to bottom – so structure them in the order you intend them to applied*

Reviewing your scoring strategy

- How many leads are converting per category (are there any trends?)
- What's your opportunity 'lost vs won' rate? – are the leads of good quality
- Are certain categories performing better than others (should the threshold be changed per category)
- Do any touchpoints need to be reviewed or adjusted?
- Is the repeat time sufficient? Should this be shortened or extended

Performing well? Then ask yourself…

- How can we shorten the customer journey (prospect lifecycle)
- How can we increase the share of existing customers?
- How can we win new customers (improve data acquisition)
  - How can generate more prospects
  - How can we generate more leads



Collaboration!

Make sure you work with…

- Pre sales or customer success functions
- Marketing operation colleagues
- Wider marketing team
- Campaign owners
- Sales
- Strategy team
- Product managers

It is important that these functions know

1. How this process works
2. What is a marketing lead
3. What action is needed
4. How to understand prospect activity

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Thank you!

We appreciate your attendance at this session. If you have any questions please reach out to us via Goldcast or use the information below. We hope you enjoy the rest of the conference!

Speaker Chris Meah