

# Lead & Account Scoring Implementation Guide

A 4-week roadmap to build and launch your lead scoring and routing engine.

This guide provides a structured, phase-by-phase approach to designing, building, and launching a lead and account scoring model with automated routing. Each phase includes specific activities, responsible parties, and measurable outputs to keep your implementation on track.

<b>Phase 01</b>	<b>Define ICP &amp; Scoring Criteria</b>	Week 1
<b>Phase 02</b>	<b>Build the Scoring Model</b>	Week 2
<b>Phase 03</b>	<b>Configure Routing &amp; SLAs</b>	Week 3
<b>Phase 04</b>	<b>Measure &amp; Optimize</b>	Week 4+

# Define ICP & Scoring Criteria

## DISCOVERY

Align your team on ideal customer profile (ICP) attributes and the behavioral signals that indicate buying intent. This phase translates your go-to-market strategy into concrete, scoreable data points.

### Key Activities

- 1 Analyze your last 12 months of closed-won deals to identify the firmographic attributes (industry, employee count, revenue, tech stack) most correlated with conversion.
- 2 Interview sales and CS leaders to surface the behavioral signals (pricing page visits, demo requests, content downloads, product usage) that reliably predict pipeline progression.
- 3 Define fit scoring criteria with point values: assign weights to each firmographic attribute based on correlation strength from your win analysis.
- 4 Define intent scoring criteria with point values: assign weights to each behavioral signal based on recency, frequency, and historical conversion impact.
- 5 Document negative scoring signals (competitor domains, student emails, unsubscribes, bounced emails) that should deduct points or disqualify leads.

### Deliverables

- ICP attribute matrix with weighted point values
- Behavioral signal catalog with point assignments
- Negative signal and disqualification rules
- Stakeholder sign-off on scoring criteria

# Build the Scoring Model

## CONFIGURATION

Implement the scoring model in your MAP/CRM. Configure fit scores from firmographic data, intent scores from behavioral triggers, and composite scoring that combines both dimensions into actionable lead tiers.

### Key Activities

- 1 Configure demographic/firmographic scoring rules in your marketing automation platform (MAP) using the ICP attribute matrix from Phase 01.
- 2 Set up behavioral scoring triggers for key intent signals: page visits (with recency weighting), form submissions, email engagement, content downloads, and product usage events.
- 3 Build the composite score formula that combines fit + intent into a single lead score, ensuring both dimensions are weighted appropriately for your sales motion.
- 4 Define four lead tiers based on composite score ranges: Tier 1 (Hot, immediate routing), Tier 2 (Warm, prioritized follow-up), Tier 3 (Nurture, marketing sequence), Tier 4 (Disqualified/low fit).
- 5 Test the model against 90 days of historical leads to validate that tier distribution matches expected conversion rates and adjust thresholds as needed.

### Deliverables

- MAP/CRM scoring rules (live)
- Behavioral trigger configuration
- Composite score formula documented
- Tier definitions with score thresholds
- Historical backtest results and adjustments

# Configure Routing & SLAs

## ENABLEMENT

Connect your scoring model to automated lead routing. Define assignment rules by territory, segment, and tier, set response-time SLAs for each tier, and train reps on the new workflow.

### Key Activities

- 1 Build automated routing rules that assign Tier 1 and Tier 2 leads to the correct rep based on territory, segment, account ownership, and round-robin fallback logic.
- 2 Configure Tier 3 leads to enter marketing nurture sequences automatically, with re-scoring triggers that promote them when they cross the Tier 2 threshold.
- 3 Set response-time SLAs by tier: Tier 1 within 5 minutes, Tier 2 within 1 hour, Tier 3 marketing touch within 24 hours. Configure escalation alerts for SLA breaches.
- 4 Train sales reps on the new scoring model: what the tiers mean, how to interpret lead scores, expected response times, and where to find lead intelligence in the CRM.
- 5 Run a one-week pilot with a subset of reps to validate routing accuracy, SLA compliance, and identify any scoring edge cases before full rollout.

### Deliverables

- Automated routing rules (live)
- Nurture sequence integration for Tier 3
- SLA definitions with escalation workflows
- Rep enablement session (recorded)
- Pilot results and adjustment log

# Measure & Optimize

## ITERATION

Track scoring accuracy, routing efficiency, and conversion rates by tier. Use data to continuously refine scoring weights, tier thresholds, and routing rules as your market and product evolve.

### Key Activities

- 1 Monitor conversion rates by tier weekly to validate that Tier 1 leads convert at significantly higher rates than Tier 2, and Tier 2 higher than Tier 3.
- 2 Track speed-to-lead metrics by rep and tier, targeting 90%+ SLA compliance. Identify reps or territories with persistent SLA breaches for coaching.
- 3 Review scoring accuracy monthly: analyze leads that converted despite low scores (false negatives) and high-score leads that never converted (false positives) to refine weights.
- 4 Adjust tier thresholds quarterly based on volume and conversion data. As your model improves, tighten Tier 1 criteria to keep the hottest leads truly hot.
- 5 Conduct a monthly scoring review with marketing and sales leadership to discuss model performance, emerging signals (new intent sources, product changes), and upcoming ICP shifts.

### Deliverables

- Weekly conversion-by-tier dashboard
- Speed-to-lead and SLA compliance report
- Monthly scoring accuracy review
- Quarterly threshold adjustment log

# Launch Checklist

## Week 1

- ICP firmographic attributes identified and weighted
- Behavioral intent signals cataloged with points
- Negative scoring rules defined
- Stakeholder sign-off obtained

## Week 2

- Fit scoring rules configured in MAP/CRM
- Behavioral triggers live and firing
- Composite score formula implemented
- Four lead tiers defined with thresholds
- Historical backtest validated

## Week 3

- Routing rules live for Tier 1 and Tier 2
- Nurture sequences connected for Tier 3
- SLAs set with escalation alerts
- Rep enablement session delivered
- Pilot completed and adjustments made

## Week 4+

- Weekly conversion-by-tier reporting active
- Speed-to-lead tracking operational
- Monthly scoring review cadence set
- Quarterly threshold review scheduled