LeanData Account Scoring Guide

Overview

Why is Account Scoring used?

LeanData Account Scoring allows your business to roll up the most relevant scoring metrics to power account-level analytics and lets you identify the most relevant accounts to orchestrate the best engagement strategy. Use custom scoring to define the best scoring metrics and score accounts using any scoring field on your Leads and Contacts.

Account Scoring Functionality includes:

- Aggregates Lead and Contact scores to their Matched Accounts
- Native within your Salesforce environment
- Configurable score weighting
- Automatically refreshes once per day

**Checkpoints prior to setting up Account Scoring:**

- LeanData Matching (Lead2Account Tagging) must be enabled and run prior to use.
- Work with LeanData Customer Success to configure appropriate tagging rules within your Salesforce instance.
- Field Mappings must be set up (numeric custom account field) first before setting up Account Scoring Modifier and a Field Mapping may be created for each score type and operator pair (details below).

Setting up Account Scoring

In order to set up the Account Scoring section of LeanData first, let's set up Field mappings.

Field mappings are used to determine which Account field you wish to map the aggregate account score to.

1. You can go to the LeanData application within your Salesforce instance and click into the matching section, click the Account Scoring section and the Field Selection page.
2. Click on the + symbol by **Add row**
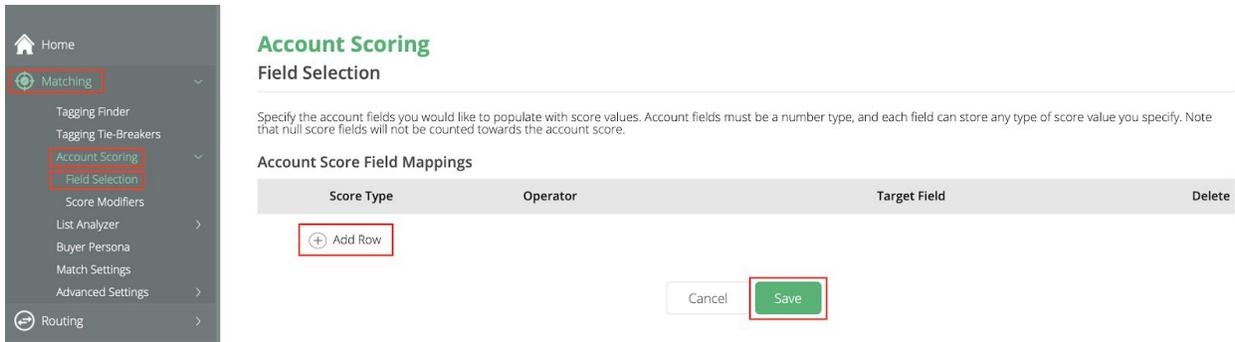
3. Specify your Account Fields Mappings

Managing Account Score Field Mappings

1. **Score Type**: Specifies the types of Lead and Contact scores to consider (positive, negative or both)
2. **Operator**: Determines what LeanData does with the scores that are rolled up to the Matched Account; Examples: sum score, median score, minimum score, etc.
3. **Target Field**: These are the fields that LeanData will populate with the calculated account score values.

a . NOTE: Account Scoring fields must first be created in your Salesforce instance to show up in the Target Field drop down.

4. Remember to save your changes before exiting the Account Scoring Field Mapping Page

Creating an Account Score Modifier

1. Navigate to the LeanData Tab and Click on **Score Modifiers** under **Account Scoring** in the left sidebar
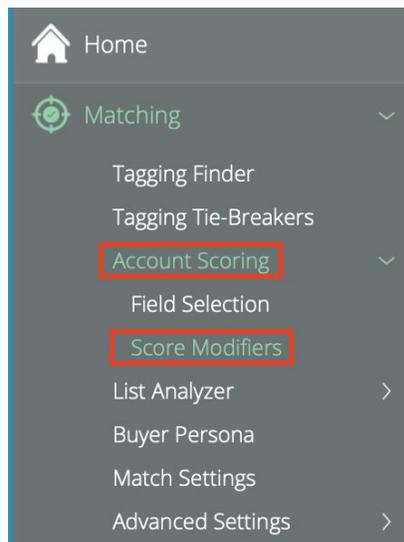
2. Determine your Account Score Modifiers

Account Scoring

Score Modifiers

Account Scoring aggregates lead and contact scores to their matching accounts (score source fields are specified via Lead Field and Contact Field). Conditions specified below will multiply the lead and contact score by the associated modifier value (e.g. modifier of 5 multiplies existing score by 5, modifier of 0 will result in a 0 score). For Account Scoring to work, the Matching product must be enabled. Note that 'Save and Run' will not clear any fields, it will only calculate updated scores based on the modifier rules below.

Lead Field	Contact Field	Operator	Value	Modifier	Delete

+ Add Row

Cancel   Save   Save and Run

Managing Account Score Modifiers

Make sure that the **Enable Account Scoring** setting is enabled (check box).

1. **Lead Field:** Selects the Lead field that stores the relevant score to roll up to the Account level
2. **Contact Field:** Selects the Contact field that stores the relevant score to roll up to the Account level
3. **Lead Field:** This is the Lead field you will evaluate to determine whether to apply a modifier
4. **Contact Field:** This is the Contact field you will evaluate to determine whether to apply a modifier
5. **Operator:** Determines how to detect the modifier criteria (e.g. Contains, Does Not Contain, Greater Than, etc.)
6. **Value:** Is used with the Lead/Contact field criteria and operator to determine which Leads and Contacts will have a score modifier applied to them
7. **Modifier:** This will determine how LeanData will modify the Lead and/or contact score before rolling it up to your Account score field (e.g. a modifier of 2 will double the score, a modifier of 0 will zero out a score)
8. **Save:** This will save the Account Score Modifier settings, but will not run the Account Scoring job (it will run automatically every evening)
9. **Save and Run:** This will save the Account Score Modifier settings and trigger a scoring job to run immediately.

Best Practices

1. **Zero out certain titles:** Test titles, interns, consultants
2. **Increase scores based on titles:**
   A. If a Sales Ops or Sales Operations title is the target buyer for product, increase their score 10x
   B. For Head Of/Director/VP/Vice President titles, increase their score 20x
3. **Reporting:** Create reports with accounts that have scores above or below a certain threshold
4. **Segmentation: Segment nurture emails, communications and marketing pushes based on account scores**

Questions? Contact support@leandatainc.com