

Practical B2B Lead Scoring

UNDERSTAND AND ASSESS

TIME: 60 minutes | OUTPUT: A small, explainable scoring model ready for historical review.

Name / team: _____ Date: _____

Work with sales to identify signals that indicate a good fit and meaningful interest. Begin with a few reliable signals. This is a planning worksheet, not a guarantee of conversion or a preconfigured CRM calculator.

Key idea

Fit describes whether an account or person matches your intended customer. Engagement describes what they do. Keep these dimensions visible separately so frequent activity does not hide poor fit. Treat missing information as unknown.

Illustrative model only: target industry +10 fit; relevant role +10 fit; consultation request +20 engagement; attended product session +5 engagement. Example review gate: fit at least 10 and engagement at least 20, with no explicit exclusion. Validate before adopting.

Who is our intended customer, and which needs can we reliably serve?

Which historical outcomes will we use to assess usefulness?

Which data is reliable enough to score, and which remains unknown?

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BUILD YOUR WORKING PLAN

Define a first scoring model

For each signal, specify the data source, points, maximum repetition, and expiration where appropriate. Separate a true exclusion from a negative signal. A personal email address or missing job title alone is not proof of poor fit.

Signal / definition	Fit or engagement	Points / cap	Expiry / evidence
Target industry			
Relevant buying role			
Consultation request			
Meaningful event activity			
Explicit exclusion			

What combination triggers human review, and who reviews it?

When should old activity stop contributing? How do repeat actions avoid inflation?

What happens when sales rejects a scored lead or later changes its outcome?

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VALIDATE AND TAKE ACTION

Completion checklist

- ☐ Sales and marketing agree on each signal and its definition.
- ☐ Fit and engagement can be explained independently.
- ☐ Repeated activity is capped and stale activity is addressed.
- ☐ Explicit exclusions have evidence and a review process.
- ☐ Won, lost, accepted, and rejected examples have been reviewed.
- ☐ A pilot owner, sample period, and review date are recorded.

Measure what changes

Track sales acceptance: accepted scored leads / reviewed scored leads. Also inspect missed good leads below the threshold; acceptance alone can hide low coverage.

Our baseline / target / data source / review date:

Suggested implementation rhythm

Review a representative historical sample, including weak and strong outcomes.

Pilot with human review before automatic high-volume routing.

Compare outcomes by score band, then adjust one assumption at a time.

First action / accountable owner / due date:

Open issue / decision needed / approver:
