

The New Way to Score Accounts Built on the Customer Journey



CaliberMind



Traditional lead scoring is failing.

Traditional lead scoring takes into account a variety of predetermined factors that help in qualifying a leads propensity to purchase. Savvy businesses will likely have established scoring criteria that includes a combination of demographic attributes, lead source and estimated budget.

Popular marketing automation tools such as Marketo and Hubspot, may also complement this data with what they call “behavioral attributes,” which by their definition includes online activity such as page views, email engagement or content downloads.

So, what’s wrong with this strategy? The “behavioral attributes” used by traditional lead scoring models are focused on the top of the funnel.

But, today’s B2B buyer journey is more complex, non-linear and circular than ever before.



Account Based changes everything.

Just when you thought you have arrived at lead scoring nirvana, came Account-Based Marketing and changed everything; now instead of scoring individual leads you need to score entire accounts, but traditional CRM & Marketing Automation systems were never built to handle accounts. Without account scoring (as well as Leads to Account Matching which is table stakes in today's ABM world), your inside sales rep can be qualifying John, your marketing team can be emailing Jennifer and your outside sales rep can be showing demos to Kevin, all without knowing that they all belong to the same company. This creates confusion not only for your buyers that may find themselves in different sales cycles, but also for your marketing team that is wasting resources and could potentially delay or lose the sales opportunity.

For lead or account scoring technology to provide value, it has to be smarter. According to Gartner, 70 percent of leads are lost from poor follow-up. But, with hundreds of leads coming in every day, how do you prioritize? Organizations need a full-time, intelligent system for monitoring successes and failures. One that automatically adjusts the scoring based on real-time data and results.



So, let's get to it. What's better?

At CaliberMind, we've tackled this problem through the consolidation of data, the integration of essential applications and dynamic lead and account scoring functionality. The platform integrates fit, intent and engagement data from multiple internal and external data sources, your marketing automation tools, CRM, support, chat, web and product. A lead or account score is assigned that dynamically changes based on product engagement, firmographic, demographic and behavioral criteria. Automated triggers then push this data to feed Salesforce, your marketing automation tools and more.



A new account scoring model built on the customer journey.

Fit + Intent + Engagement

That's It.



Fit.

Refers to leads and accounts that fit the Ideal Customer Profile of who your company is trying to market and sell to. Preferably, fit refers to your ICP + AI-assisted scoring. Think of ICP as the firmographic, technographic, geographic, etc. filters you apply to your data to narrow your accounts to your target market, plus an incredibly powerful machine that considers thousands of variables to see if those accounts are similar to your healthy customers, open opportunities, or whatever you decide is best for your business to build your model from.

Data Type	Data Source	System	Tracking Method
Company Data (Firmographics)	Enrichment Vendors	CRM	Integrations API calls (e.g. Clearbit, Discover Org, D&B)
People Data	Enrichment Vendors	CRM	Integrations API calls
Org Chart Data	Enrichment Vendors	CRM	Integrations API calls



Intent.

Intent data shows what people at companies are searching for and consuming on the internet (not just your website). This is a signal of possible “intent” based on their current interests relative to historical data. Intent data can be from first party (your web properties) such as: anonymous website visitors, forms etc’ or third party web properties such as keywords searches and industry publications (aggregated by vendors such as Bombora), online review sites (G2 Crowd, Capterra), niche publications, public forums etc’ (we use a proprietary CaliberMind’s crawler to scan and index those). At CaliberMind we assign different score based on the level of intent - Low, Medium, High.

Data Type	Data Source	System	Level of Intent	Tracking Method
Form Submission	Internal	Marketing Automation	High	Integration and Incoming Webhooks
Basic Web Analytics	Internal	Web Analytics	Medium	Integration (e.g. Google Analytics, Adobe Analytics)
Anonymous website visits	Internal	Website	Medium	CaliberMind.js, Integration IP lookup
Google Searches, keywords, industry publications	External	Varies	Medium	API calls (e.g. Bombora, Tech Target)
Online Review Sites	External	Varies	High	API calls (e.g. G2 Crowd, Capterra etc’)
Niche publications, public forums, job sites etc’	External	Varies	High	CaliberMind's web crawler
Employee Referral	Internal	Varies	High	Link Tracking
Customer Referral	Internal	Varies	High	Link Tracking



Engagement.

Engagement aggregates activity from all the people who are interacting with your company at the account level so you can understand and act on this response and behavior. Ideally, you want to focus on high-value activity. For example, we prioritize companies that spend time on our product pages more than those that visit high-level blog posts because it's a better signal, of course, of who may be evaluating our product. Having the ability to track people who are not in your database (and are therefore anonymous) is an important capability.

Data Type	Data Source	System	Level of Intent	Tracking Method
Email Engagement	Internal	Marketing Automation	High	Integration Incoming webhooks
Product usage (B2B SaaS)	Internal	Product data warehouse	High	Integration (via Redshift)
Live chats	Internal	Chat app	Medium	Integration (e.g. Drift, Intercom)
Meetings held	Internal	CRM	High	Integration
Ad campaigns	Internal	Advertising Platforms	Low	URL shortener Integration (e.g. Terminus, Madison Logic, Metadata.io)
Trial signups (B2B SaaS)	Internal	Product data warehouse	High	SQL Importer, Integration
Transactional emails (B2B SaaS)	Internal	Product data warehouse	Low	SQL Importer, Integration
Social Media	Internal	Social Media Management Platform	Low	URL shortener Integration (e.g. Buffer, HootSuite, Oktopost)
SDR Outbound Campaign	Internal	CRM + Outbound tools	Low	Integration API Calls (e.g. Outreach, Salesloft)
Webinar (Attendee)	Internal	Marketing Automation	Medium	Integration
IRL Events (Attendee)	Internal	Marketing Automation	Medium	Integration List upload
Content Syndication	External	Content Syndication platforms	Medium	List upload API integrations (e.g. NetLine, Demand

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together.

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