Lead Scoring

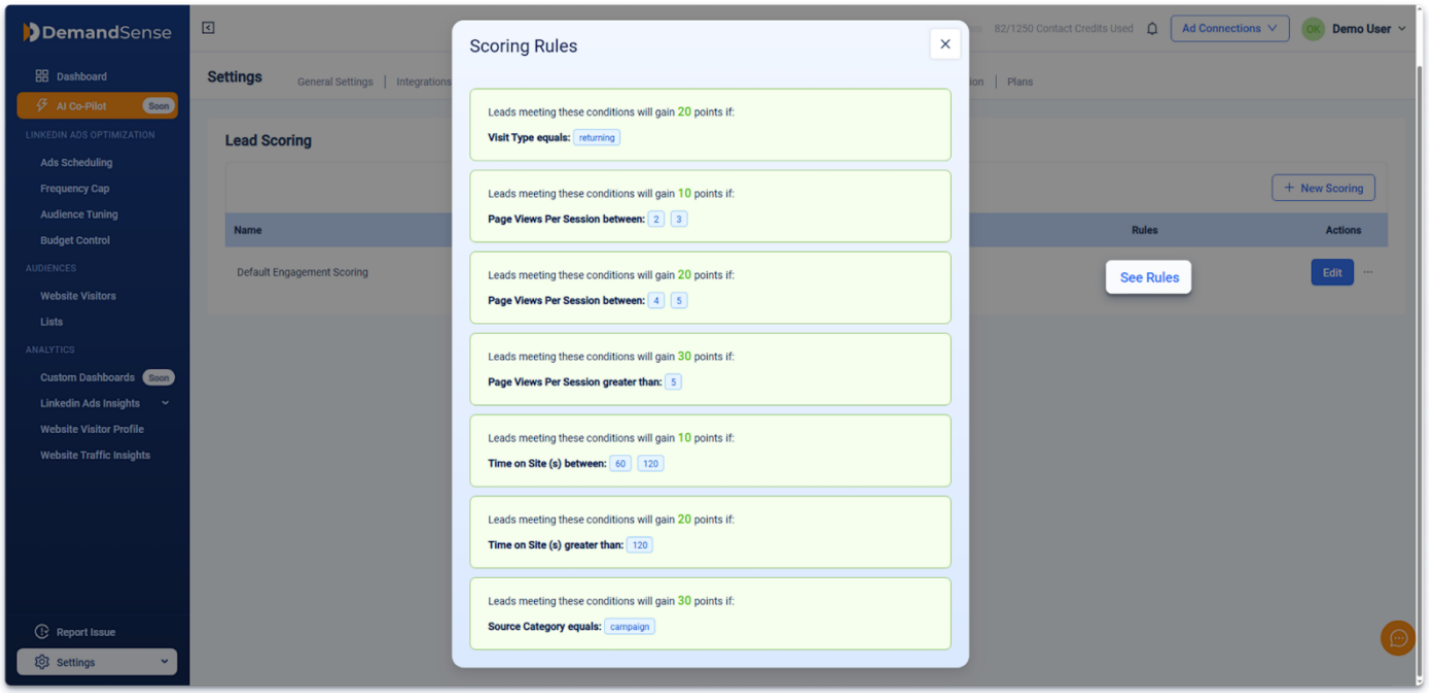
Website Visitor Identification · https://knowledgebase.demandsense.com/docs/lead-scoring/

Lead Scoring allows you to evaluate and rank your leads based on two key criteria: how well they match your ideal customer profile (**Fit**) and how they interact with your website and content (**Engagement**). Fit Scoring encompasses both Firmographics Scoring (company-related attributes like industry and size) and Business Identity Scoring (individual or business verification attributes like job title or country). This guide walks you through the full setup process step by step.

Engagement Scoring: Measure Lead Activity

While Fit Scoring looks at *who* your leads are, **Engagement Scoring** measures *what they do*. This helps you understand which leads are showing strong interest through their behavior on your site or platform.

Engagement Scoring is enabled by default with a set of predefined rules to get you started. These can be edited, deleted, or expanded upon at any time. The default setting includes the following scoring rules:



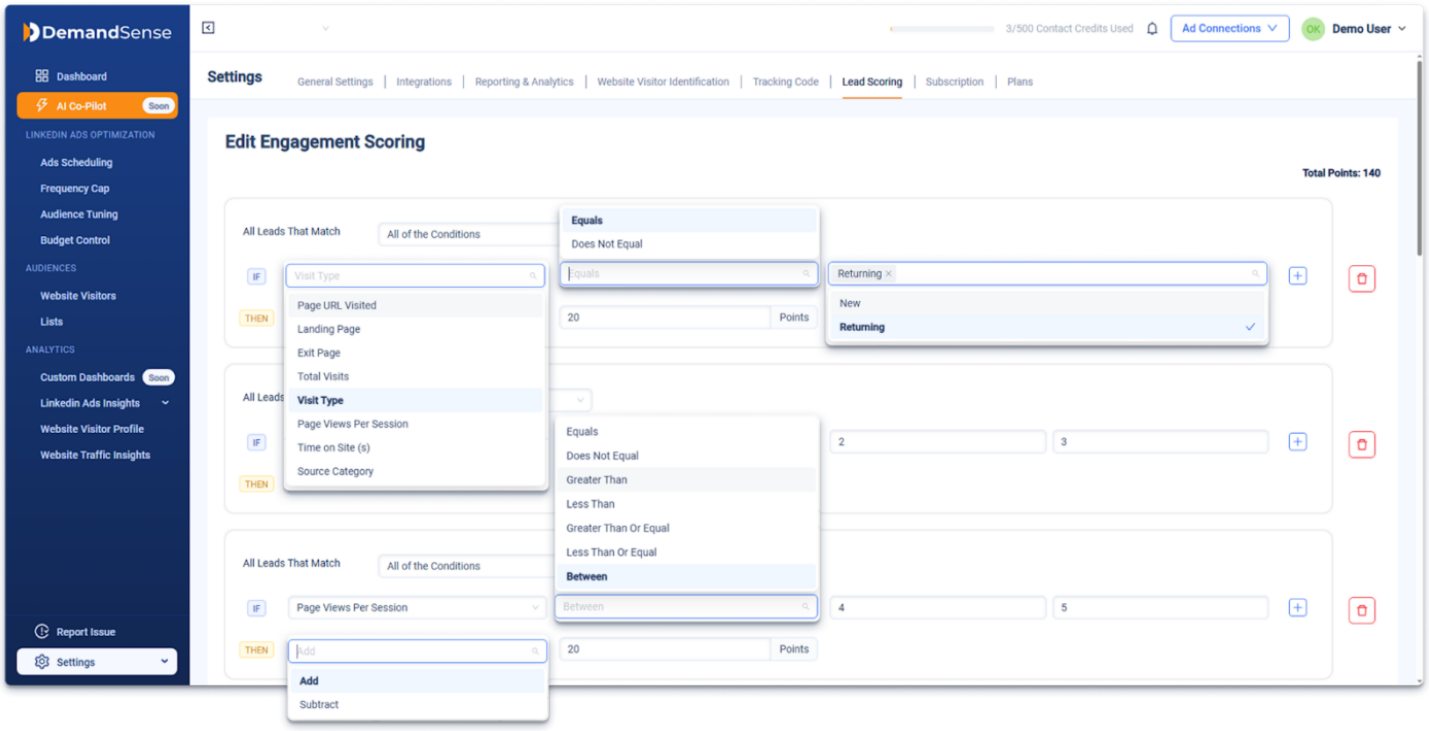
You can define additional rules that give or remove points based on specific actions, such as visiting a pricing page, time on site, total visits, etc.

How It Works

Each Engagement rule starts with an "**IF**" condition setup, where you:

- Select a Property from the available options (e.g., Page URL Visited, Landing Page, Exit Page, Total Visits, Visit Type, Page Views Per Session, Time on Site (s), Source Category).
- Select a Condition (e.g., equals, does not equal, greater than, less than, greater than or equal, less than or equal, between).
- Input a Value to match against.

For the "**THEN**" action, select an Action (Add or Subtract) and input the Number of Points to assign.



You can add multiple conditions using the "**+ Add Condition**" button to build more complex rules and apply grouping logic to control whether all conditions must be met ("All of the Conditions" - AND) or just any of them ("Any of the Conditions" - OR). While you can assign more than 100 points across all rules, the total Engagement Score a lead can receive is capped at 100.

Fit Scoring: Identify High-Quality Leads

Fit Scoring helps you assess how closely a lead aligns with your target audience using demographic, firmographic, or business identity data. Fit Scoring is divided into two distinct types, which you select when creating a new scoring model: *Firmographics Scoring* and *Business Identity Scoring*.

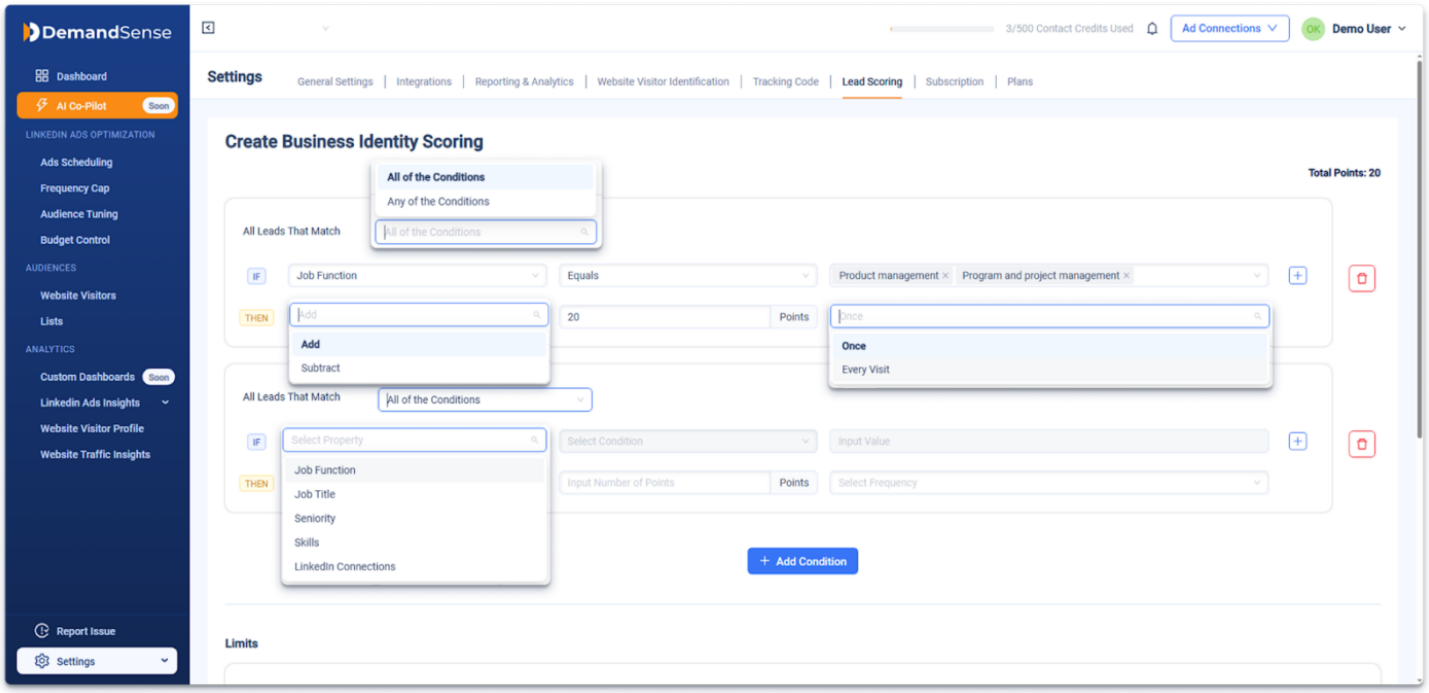
- **Firmographics Scoring**: Focuses on company attributes such as Company Name, Industry, Headquarters Country, Company Description, or Company Size (e.g., “Industry is SaaS” or “Company Size > 50 employees”).
- **Business Identity Scoring**: Focuses on individual or professional attributes such as Job Function, Job Title, Seniority, Skills, or LinkedIn Connections (e.g., “Job Title contains Manager” or “Seniority is Director”).

When creating Fit Scoring rules, you define conditions and assign scores based on how well a lead matches them. You can choose to apply the score when **"*All of the Conditions*" *(AND)*** or when **"*Any of the Conditions*" *(OR)***, giving you flexibility in how you identify high-quality leads.

How It Works

Just like with Engagement, each Fit rule starts with an "**IF**" condition setup, where you:

- Select a Property from the available options for the chosen scoring type.
- Select a Condition (e.g., contains, does not contain, equals, less than, etc.).
- Input a Value to match against.



For the "**THEN**" action, input the Number of Points to assign (you can add or subtract points based on the condition). Frequency options allow you to choose whether the score is applied only once per lead or every time the lead visits your site.

You can add multiple conditions using the "+ Add Condition" button to build more complex rules. Although the total of all assigned points can exceed 100, the maximum Fit Score a lead can achieve is capped at 100.

This step is optional — you may skip it if you're only interested in tracking engagement.

Score Decay: Keep Your Data Fresh

Leads can become stale over time if they stop interacting with your brand. To reflect this, you can apply **decay rules** to gradually reduce scores for inactive leads.

Decay can be set up independently for Fit and Engagement scores. When enabling decay, you choose:

- **How much** the score should decrease (e.g., 25%, 50%, 75%, or 100%)
- **How often** it should decrease (e.g., after 1, 3, 6, or 12 months of inactivity)

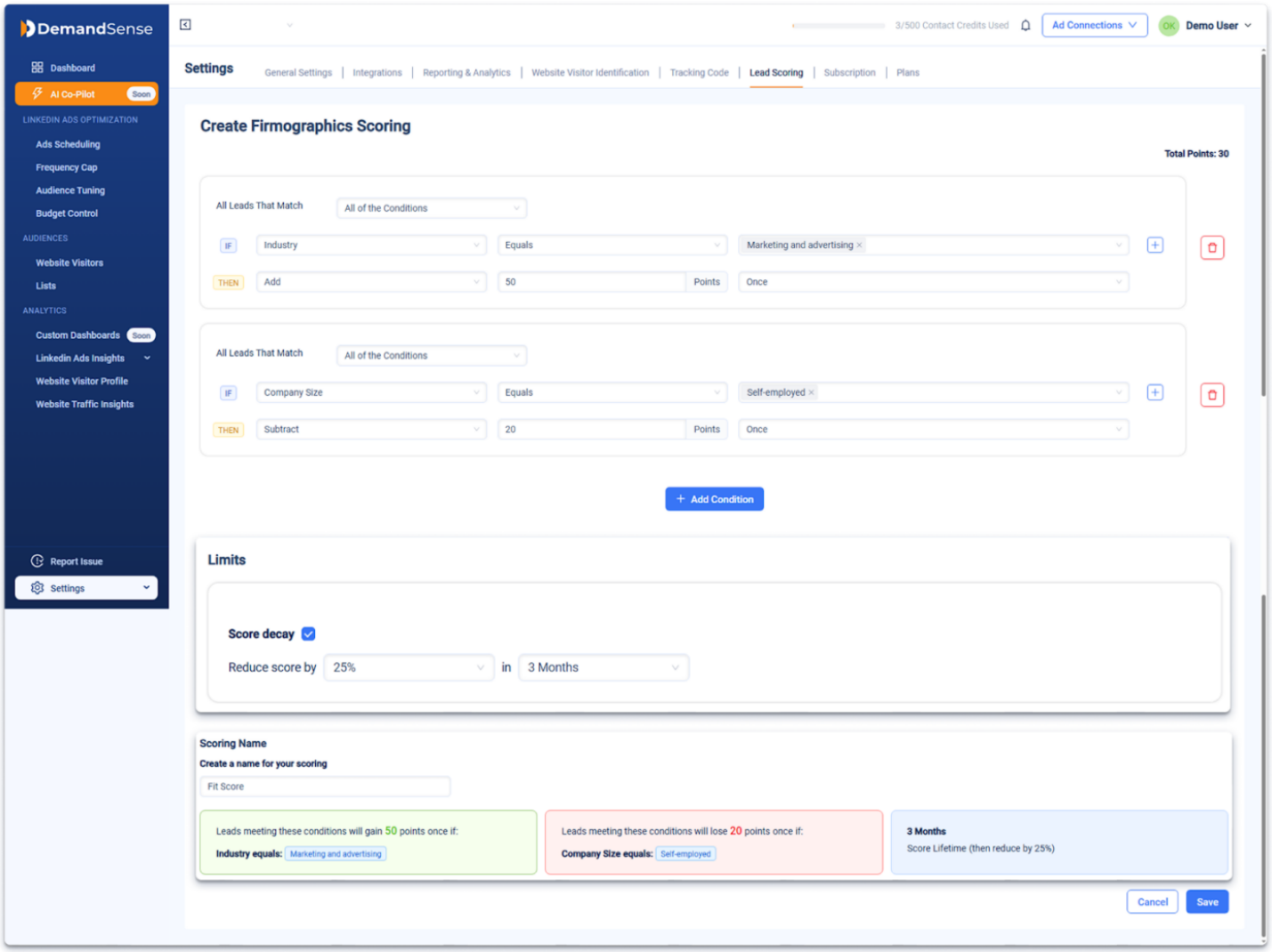
For example, if a lead hasn’t engaged in 3 months and you’ve set a 25% decay, their score will be automatically reduced by 25%. As soon as the lead becomes active again, the decay timer resets.

If you prefer to keep scores static, you can skip this step entirely.

Review & Save

Once you’ve configured your Engagement, Fit, and (optionally) Decay settings, you’ll be taken to a final review screen, where you will see:

- A complete summary of all rules and actions you’ve created.
- Color-coded indicators:
  - **Green** for positive scoring rules
  - **Red** for negative scoring rules
  - **Blue** for decay settings



Before you can save, you'll need to assign a name to your scoring model(s). This summary is read-only. To make changes, return to the relevant step.

Editing an Existing Scoring Model

You can edit any scoring model at any time. When editing, you'll be able to:

- Update the name of the scoring model
- Modify Fit or Engagement rules
- Adjust or enable/disable decay settings

Once changes are saved, new leads will be scored according to the updated logic. Note that default Engagement rules can be fully customized or deleted if they don't fit your needs.

Re-Scoring Historical Leads

Whenever you create or edit a scoring model, you'll have the option to **apply the scoring to past leads** based on their recent activity.

You can choose to re-score:

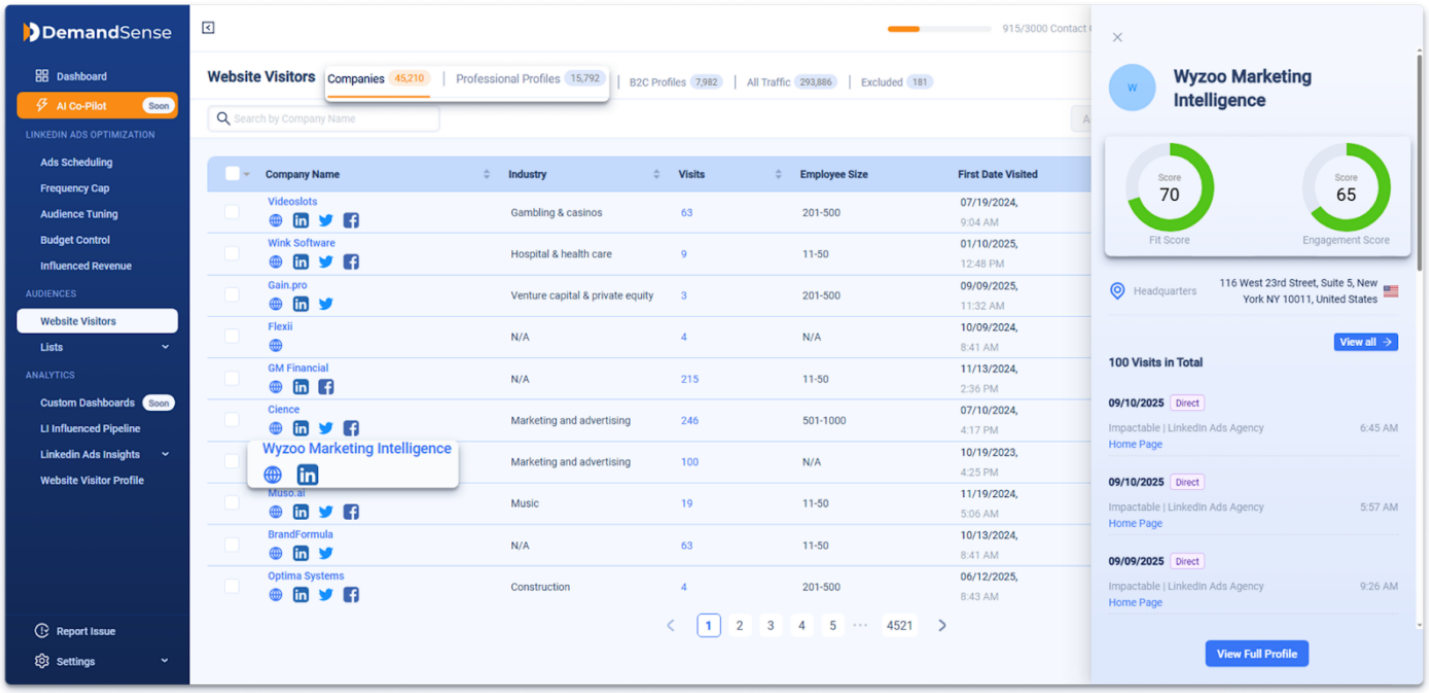
- Leads active in the last 1 month (default)
- Last 3 months
- Last 6 months
- Last 12 months
- Or apply the rules only to new leads moving forward

This gives you full control over how scoring logic is retroactively applied and ensures consistency across your lead database.

Viewing Lead Scores

Once your scoring model is set up and applied, you can view the Fit and Engagement scores for identified leads in the ***Website Visitors*** tab under the ***Audiences*** section. This provides detailed visitor data at both the company and professional profile levels.

- **For Companies**: Navigate to Website Visitors > *Companies*. Select a company to view its profile sidebar, which displays the Fit Score and Engagement Score as circular progress indicators, along with additional info like headquarters, total visits, and traffic sources.
- **For Professional Profiles**: Similarly, in Website Visitors > *Professional Profiles*, select an individual profile to see their Fit and Engagement scores alongside personal details such as job title, contact info, and behavioral data.



Lead Scoring enhances this by using identity resolution, behavioral tracking, and machine learning to reveal intent signals, helping you qualify leads based on real engagement.

Use Cases

Here are several practical use cases to illustrate how Lead Scoring can be applied to enhance your sales and marketing strategies:

- **Prioritizing Sales Outreach**: Use high combined Fit and Engagement scores to identify leads most likely to convert, allowing your sales team to focus efforts on prospects with the greatest potential, such as those in your target industry who have repeatedly visited relevant pages.
- **Marketing Segmentation and Nurturing**: Segment leads based on their scores to deliver personalized campaigns—for instance, send educational content to low-engagement leads to build interest, or promotional offers to high-fit leads showing moderate activity.
- **Sales and Marketing Alignment**: Establish shared scoring criteria to align teams on what constitutes a "hot" lead, reducing friction and ensuring everyone works from the same definitions of lead quality.
- **Performance Monitoring and Optimization**: Leverage score decay to flag inactive leads for re-engagement campaigns, and analyze scoring trends over time to refine your rules and better

match your evolving ideal customer profile.

Summary

Lead Scoring helps you better understand and prioritize leads by assigning points based on who they are (via Fit Scoring, including Firmographics and Business Identity) and how they engage. With flexible rules, customizable decay, and options to re-score past leads, you can fine-tune your approach to match your sales and marketing goals. Scores are readily viewable in the Website Visitors tab for quick insights and action.