



Visual Scoring – the 360° View:

5 Steps for Getting Started with
Easier, Faster and More Effective
Lead Scoring

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Lead Scoring – For Most a Great Idea in Concept, But Not in Practice

Lead scoring is a great thing – once in place, it can be a fast and easy way to help you and your salespeople prioritize and value every lead. Traditional scoring models give points to individuals as they take actions on your websites or display certain buying behaviors. This is also known as digital body language.

But lead scoring is fraught with problems. On one hand, you must have the data and expertise necessary to create a lead scoring model; on the other hand, you have to get your sales team to buy into several ideas:

- You and your sales team must agree as to what qualifies as a high quality lead.
- You must be able to codify the definition of a high quality lead into an understandable and reliable scoring system.

Some salespeople resist the idea that a number or code can tell them the value of a lead. They can't easily see why one lead scores high and another low. And when they don't understand something, they're far less likely to use it. Other salespeople love the idea that a number or code can tell the story but often grow frustrated by apparent random patterns as to why some leads score high. It only takes a few situations where a lead is mis-scored (after all, no model is perfect) to cause sales reps to lose confidence. Anecdotal stories about bad scores go flying through the sales team as proof that scoring doesn't work.

A New Way of Lead Scoring – Visual Scoring

At Tableau Software, we've found a different way of doing lead scoring. We call it "Visual Scoring". Visual Scoring not only lets sales reps literally see why one lead is better than another but also lets them semi-customize the score to their personal selling style. Since

we launched Visual Scoring, we've shortened our sales cycle by 14% and seen our conversion rates (from lead to sale) increase by 22%. And guess what? We've tightened the marketing-sales funnel – our partnership with our sales team has never been better.

The best way to understand what we mean by lead scoring is for us to share with you one of our favorite Visual Scoring dashboards. The dashboard in Figure 1 provides a 360° view of every customer in our Salesforce CRM database.

We can see everything going on with any particular person or account - including support cases, website visits, trials, downloads, and seminar attendance - all in a single view. Every sales rep automatically gets a dashboard relevant to their specific territories. Reps can exclude certain types of activities when they believe that those activities don't add to understanding the sales quality of a lead. They can drill down into any bit of information by clicking on it. There are even options to select a time period for when those activities occurred, or to filter to a single account or group of accounts.

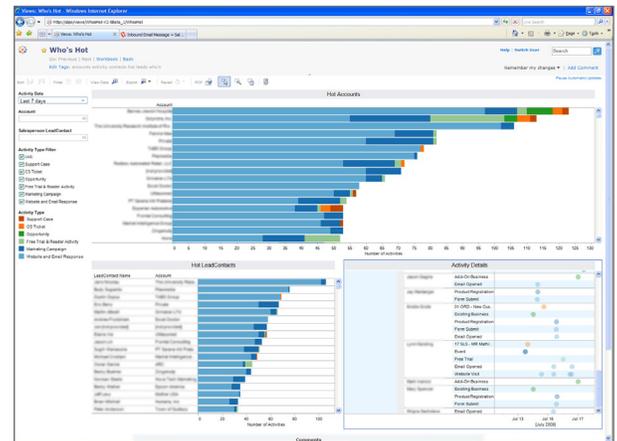


Figure 1: The most active accounts and contacts rise to the top of a Visual Scoring dashboard based on everything we know about them. Activities are colored by their type such as campaign participation or free trial downloads. One can also select an account or multiple accounts and see how active everyone associated with that account has been. The bottom right view displays all the associated activities for any selected account or contact on a timeline.

This interactive dashboard gives insights into accounts and territories that might not otherwise be visible. It's particularly useful in making sure we reach out to the right people at the right time. For example, if several red support cases appear next to an account, we realize we need to pick up the phone and check in with the account's primary contacts.

A view like this replaced scoring models typically used by BtoB sales and marketing departments to determine which prospects are ready to engage with us. And the sales team loves it.

The 6 Secret Ingredients to Visual Scoring

So what makes a visual scoring system effective? There are 6 qualities we've found that are necessary for a "Visual Scoring" lead system to improve sales and marketing activities over traditional algorithm-based scoring methods.

1 **A Complete View – or at least as complete as you can make it**

The most active accounts and individuals rise to the top based on all their activity, not just marketing data. Typical scoring models are built using firmographic information such as title, industry, and company size, as well as behavioral data like website visits, email click throughs, search data, and trial downloads. But missing are support cases, customer service tickets, and sales opportunity information that can help paint a more complete picture.

In this view, all the data is included and you can easily see how many of each activity type went into the Visual Score. You can even look at individual activities presented on a timeline. Time based analysis is wildly important and completely lost in most traditional scoring matrixes.

Of course, for a lot companies, a complete view is nirvana – everyone talks about getting there but no one actually can. So if your "complete view" can't be 100% complete, then use what you've got to get started and

focus on incrementally adding sources. What's great about visual scoring is that since it's so clear as to what goes into the score, it's easy to say "I could make this better if I could get call center records" in a way that management can understand. Visual scoring not only helps you build the case for a complete view but also helps you show exactly how you will make use of the additional data.

2 **User Friendly - all you need is a browser to start analyzing**

Sorted and colored bar charts are a powerful way of communicating data and easy to understand. In our dashboards, different activity types are colored by the level of engagement they most likely indicate from dark blue, relatively cold website visits to red hot support cases. And instead of presenting unruly scales caused by sizing and multiplying presumed hot activities we encode them with color.

For the systems manager, there is no scoring algorithm to maintain. So there are no worries when your business model changes or you add new assets to your website. The data pieces speak for themselves so you don't have to continually adjust and modify your scoring programs. As you add more data sources from around the company to get that complete view, those sources can be integrated into the dashboards.

3 **Actionable - much more than a static dashboard or list of scored contacts**

Relationships and influencers can be hidden in your data. So besides just a sorted list of accounts and contacts we have the ability to ask additional questions such as, "Show me every person associated with this hot account, and not just the most active ones" or "Show me account XYZ and all their activities over the past two years. Who did them and when?" Imagine asking a table of scored accounts more questions.

At any time the sales rep can link to the account or contact or activity in your CRM system. Or they can jump to which email a lead opened or which pages the lead looked at on the site. You're not trapped in the view but freed to explore and investigate with a click of the mouse.

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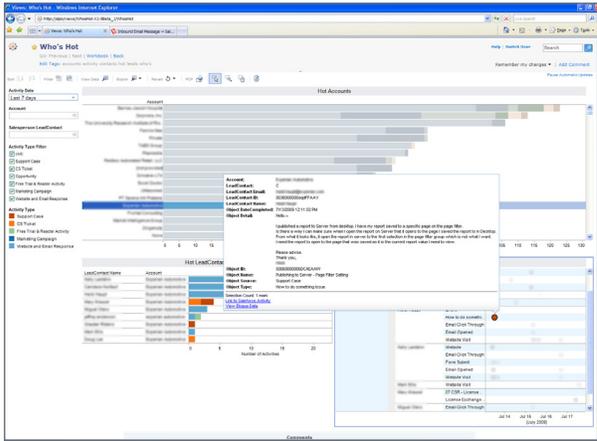


Figure 2: The Visual Scoring dashboard is very dynamic and actionable. You can ask additional questions of the data, link out to other applications, or see every transaction that went into the account or contact's score.

4 Customizable – as unique as your sales reps themselves

Because no one view is perfect and typically any answer leads to new questions, this dashboard enables salespeople to virtually customize the visual scoring to their own needs and, just as importantly, their style of selling. They can also filter on activity type - maybe they've been converting a lot people trialing software lately so they want to drill into that data. They can filter on time - maybe they were on vacation last week and want to see what was going on while they were gone. Or they want to see what happened today or yesterday.

5 Accurate & Trustworthy

Algorithm-based scoring can be great when you have millions of consumers you're marketing to and computers making decisions. But in BtoB selling where salespeople use their best judgments, it's important not to obfuscate important relationships between data variables and leave people uncertain as to how the math is performed. In Visual Scoring all the data is literally shown so there is no mystery surrounding what's going on or whether data inputs are missing.

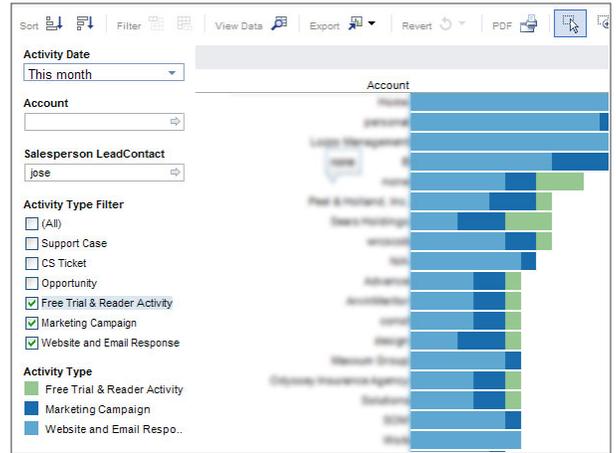


Figure 3: People can customize the Visual Scoring dashboard to answer specific questions they have. They can select time ranges, specific accounts, or even the type of activities they want to build the score with.

6 Effective

The ability of real people to see how someone percolated to the top (scored high) means they can be more effective in follow up. And ultimately people trust and use what they can see. Arcane numbers that are impossible to understand are not trusted. With trust, understanding, and actionable data comes high tool adoption and improved sales pursuit rates.

5 Steps for Getting Started with Visual Scoring

How can you get started with Visual Scoring?

1. First, review your data – where is it?

What can it tell you about the activities your prospects engage in? Can you access it easily? Do your own analysis on what activities are associated with high sales conversion rates? Whether you end up doing Visual Scoring, this conversion analysis will help with all your programs.

2. Second, talk to your sales teams.

Which kinds of activities tend to lead to closed sales? If you did create customized Visual Scoring dashboards for them, would they use it?

3. Third, be sure to pick software and systems that make it easy to maintain and support this.

Manually updating dashboards on a regular basis is a huge time stealer - especially now when there are alternatives for low-cost, easy-to-maintain applications that enable you to make this all come together.

4. Fourth, pilot a basic dashboard where the activities leading to sales are clearly identified by account and by sales rep.

Pick 2-3 sales reps to show this to – ask them how it would help them sell. Don't be surprised when each one has a different style. Iterate the dashboard until most pilot reps are saying they'd use the dashboard.

5. Finally, roll it out and promote its use.

Just putting it out there will not mean reps will change their ways and adopt it automatically. You have to get them to change behavior, which can be hard. But when they see they can be more efficient and make more money, they will want to adopt their behavior.

Does It Work?

We mentioned some hard metrics at the top of the paper that are worth repeating: since we launched Visual Scoring, we've shortened our sales cycle by 14% and seen our conversion rates (from lead to sale) increase by 22%. In addition to the hard metrics of shortening our sales cycle and seeing our sales conversions increase, we know from our sales team's anecdotal stories that it works.

We'll leave you with a quote one of our account managers, "The Who's Hot dashboard is worth checking often throughout the day. I can very quickly see what's going on right now which helps me reach out to people while we are top of mind. But it also gives me bigger picture view. 'Wow, XYZ company is in the top 5 most activities over the last 30 days, but on any given day never would come up on my radar.' Obviously this makes a huge difference in my effectiveness and how I approach selling."

And making selling more effective is a big part of any marketer's job.

About Tableau

Tableau Software helps people see and understand data. Ranked by Gartner and IDC in 2011 as the world's fastest growing business intelligence company, Tableau helps anyone quickly and easily analyze, visualize and share information. More than 10,000 companies get rapid results with Tableau in the office and on-the-go. And tens of thousands of people use Tableau Public to share data in their blogs and websites. See how Tableau can help you by downloading the free trial at www.tableausoftware.com/trial.