Overview

This template helps you score and prioritize leads based on engagement, demographics, and negative interactions. It calculates a total lead score and assigns a priority level, guiding your follow-up actions.

Please make a copy of this template to personalize it by selecting File > Make a copy.

Step 1: Add Your Customer Details

1. Open the file in Microsoft Excel or Google Sheets.
2. Go to the Lead Scoring sheet.
3. Fill in the following details for each lead:
    - Customer Name/ID: Enter the name or ID of the customer.
    - Email Address: Provide the customer’s email.
    - Last Interaction Date: Enter the most recent interaction date (optional).

Step 2: Record Engagement Activities

1. **Fill in the counts for engagement actions in the respective columns:**
    - Email Open Count (Last 30 Days): How many emails they’ve opened.
    - Link Click Count (Last 30 Days): Number of times they clicked links in your emails.
    - Resource Download Count (Last 30 Days): Count of resources (e.g., eBooks, guides) they’ve downloaded.
    - Pricing Page Visit Count (Last 30 Days): Times they visited your pricing page.
    - Purchase Count: Number of purchases made.
    - Repeat Purchase Count: Number of repeat purchases.

Step 3: Fill Demographic Information

1. For each demographic criterion, select "Yes" or "No" in the appropriate columns:
    - Ideal Customer Profile: Does the lead match your target customer profile?
    - Target Location: Is the lead located in your target area?
    - Buying Authority: Does the lead have the authority to make purchasing decisions?

Step 4: Note Negative Interactions

1. Select "Yes" or "No" for any negative actions:
    - No Opens (Last 5): Did they fail to open the last 5 emails?
    - Unsubscribed: Have they unsubscribed from your emails?
    - Marked as Spam: Did they mark your email as spam?

Step 5: Review Automatic Scoring

1. The template calculates the following automatically:
    - Engagement Score: Based on engagement actions.
    - Demographic Score: Based on "Yes" responses to demographic criteria.
    - Negative Score: Subtracts points for negative interactions.
    - Total Lead Score: Combines all scores into a final lead score.
    - Priority Level: Assigns a priority based on the total score.

Step 6: Take Action

1. Based on the Priority Level, follow these recommendations:
    - Hot Lead (15+): Immediate follow-up.
    - Warm Lead (10-14): Follow-up within 24 hours.
    - Lukewarm Lead (5-9): Follow-up within a week.
    - Cold Lead (0-4): Nurture with content.
    - Inactive (Below 0): Review the relationship.

Tips for Best Results

- **Regularly update the data to ensure accurate scores.**
- **Sort or filter leads based on scores to prioritize effectively.**