Account Scoring

BuzzBoard

Pre-Scoring Checklist

Account fit score is a leading indicator that surfaces accounts that have a need for your product or service. In contrast, traditional lead scoring is a lagging indicator—you don't score the individual's behavior until after they have taken an action.

Before building your account fit score, you should make sure you have captured in your CRM basic firmographic details about your target accounts.

> **INSTRUCTIONS**
> Use this checklist to identify the basic parameters you need to know about each target account before starting your go-to-market motions.

Do I have the basic business information about each account?

- ☐ Business Name
- ☐ Civic Address
- ☐ Phone Number
- ☐ Website URL

Do I have next-level business firmographics about each account?

- ☐ Employee Count
- ☐ Business Category
- ☐ # of Locations
- ☐ Are they a B2B/B2C/Remote Only business?

Use this space to identify other basic parameters you should know about your target accounts.

- ☐ _____
- ☐ _____
- ☐ _____

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Digiographic-Enabled Account-fit Score

With basic firmographic data identified for each account, you can start building out a simple account scoring model. However, an account fit score is the most meaningful when it is based on how each account matches your Ideal Customer Profile, as indicated by a combination of firmographic, technographic, and digiographic signals.

> **NOTE**
>
> Define a scoring metric that best works for you. For example, you can choose to score between "1-10", "1-100". "-10 to 10", etc.

See examples below that illustrate the concept of scoring for a specific parameter.

Scoring a Technographic Signal

Suppose your product is a great fit for businesses that use Hubspot or Salesforce, a good fit for businesses that use Pardot, and not a fit for everyone else.

Scoring on Online Advertising Signal

If your product works great for businesses that are in growth mode, score them high if they are spending actively on online advertising.

CRM/MARKETING AUTOMATION PLATFORM USED	SCORE
Hubspot	10
Salesforce	10
Pardot	5
All Others	0

RUNNING FACEBOOK ADS	SCORE
Yes	10
No	0

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Digiographic-Enabled Account Scoring Model Grid

The table below has some commonly used *digiographic* signals to get you started. Note that it's important to score based only on signals that you can capture in your CRM, and that best define your ICP. Many of these *digiographic* signals are indicative of a need for your product or service–by scoring based on buyer need, you'll be able to identify prospects that have use for your product and to whom you can immediately start outreach.

ICP PARAMETERS	QUESTION	SCORE
Technographic Data	Which CRM/Marketing Automation Platform do they use?	[enter in your score here]
Hiring	Is the company hiring currently?	[enter in your score here]
Advertising	Is the business actively advertising—Google, Display, Facebook, Yelp?	[enter in your score here]
Ecommerce	Is business ecommerce enabled?	[enter in your score here]
Local Listing Presence	Do they have claimed listings in online directories?	[enter in your score here]
Social Media Presence	Does the business have a company page on major social platforms?	[enter in your score here]
Online Reputation	Do they have reviews/rating on—Google Business Profile, Facebook, Yelp, Other?	[enter in your score here]
Online Security	Does the business carry required online security certifications? (SSL, DNS, DDoS Protection)	[enter in your score here]
Funding	Has the business received any funding—Grant, PPP, Loan, etc.?	[enter in your score here]

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ICP PARAMETERS	QUESTION	SCORE
[Enter your own scoring parameter here]		[enter in your score here]
[Enter your own scoring parameter here]		[enter in your score here]
[Enter your own scoring parameter here]		[enter in your score here]
[Enter your own scoring parameter here]		[enter in your score here]
[Enter your own scoring parameter here]		[enter in your score here]
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[Enter your own scoring parameter here]		[enter in your score here]

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Account Fit-Score Calculation

EXAMPLE

To illustrate, we will calculate a very simple account fit score based on two simple firmographic signals - number of employees and number of locations. In this example, we have learned by analyzing our past opportunities that businesses with 11 to 100 employees and 2 to 15 locations are the best fit for our product, so "Employee Count" and "Number of Locations" are important elements of our Ideal Customer Profile. *(We've learned that businesses with 101 to 200 employees are less than ideal, but viable in many instances, and businesses with 51 or more locations are not only not a fit to our ICP, but engaging with them is counter productive.)* This simple model will produce a "fit score" - a quantified measurement of how close each account matches your Ideal Customer Profile - that enables your sales team to simply focus on the highest scoring accounts.

EMPLOYEE COUNT	SCORE
1 to 10	2
11 to 50	10
51 to 100	11
101 to 200	5
201 +	0

NUMBER OF LOCATIONS	SCORE
1	0
2 to 15	10
16 to 50	10
51 to 100	-2
100+	-2

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Instrument the Scoring Model in Your CRM

Now that we have built a simple account fit scoring model using two signals, we can implement it as a formula field in our CRM. In this example, we create the formula on the account object in Salesforce. Note that we capture more granular values for Employee Count and Number of Locations in Salesforce than we choose to score on at this time and that's ok - for now, we simply score zero for those values.

```
CASE( Employee_Count,
"1 to 10",2,
"11 to 50",10,
"51 to 100", 11,
"101 to 200",5,
"201 to 500", 0,
"501 to 1,000",0,
"1001+", 0,0)
+
CASE( Number_of_Locations,
"1",0,
"2 to 15",10,
"16 to 50", 10,
"51 to 100",-2,
"100+", -2,0)
```