2024

Lead Scoring

Spok Inc. sought a partner who would understand its needs, goals, and database while providing strategic recommendations to meet or exceed company goals. While it has a small in-house team, it is seeking a strategic partner with deep HubSpot product knowledge to assist it in creating a workable lead-scoring program.
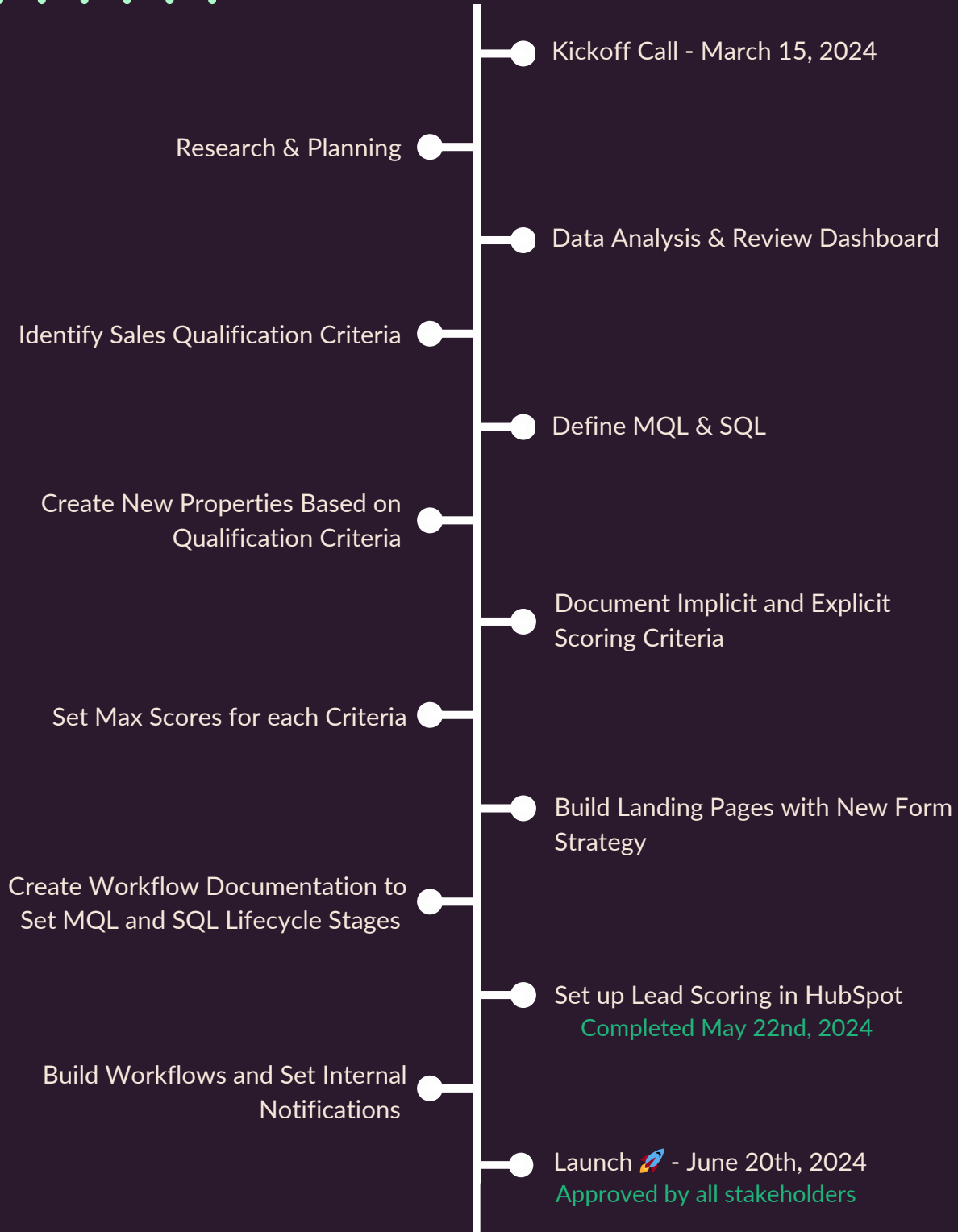
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Project Timeline

Estimated Completion: 90 Days

Kickoff Call - March 15, 2024

Research & Planning

Data Analysis & Review Dashboard

Identify Sales Qualification Criteria

Define MQL & SQL

Create New Properties Based on Qualification Criteria

Document Implicit and Explicit Scoring Criteria

Set Max Scores for each Criteria

Build Landing Pages with New Form Strategy

Create Workflow Documentation to Set MQL and SQL Lifecycle Stages

Set up Lead Scoring in HubSpot
Completed May 22nd, 2024

Build Workflows and Set Internal Notifications

Launch 🚀 - June 20th, 2024
Approved by all stakeholders

Every week, the team met to address any concerns found in the research, identify what was needed from cross-functional teams and assign tasks to various project stakeholders to complete before the next meeting.

Planning took the most time, but we feel very confident that we've completed all necessary steps to begin collecting new data. This data will inform lead scoring and provide us with data we can now measure and use to inform our strategy going forward.

Why Lead Scoring?

The sales team at Spok, Inc., uses another CRM to track sales progress. In Marketing, we need their help to identify the qualifying criteria.

The sales team comes in, and together, we identify the criteria for good-fit leads that we require to sync from their CRM or collect natively in HubSpot.

We also discovered we didn't know what happens to a lead beyond being an Opportunity or Customer. **We needed to close the loop.**

Could there be an opportunity to enable the sales teams with leads that have gone cold or weren't ready to buy just yet? We didn't know.

The operations team is here to help! They are working to close the loop by syncing closed lost data to HubSpot.

The Challenge & Solution

It's OKAY that we don't have the data for scoring criteria! We can start collecting it.

First, we need to identify the Object (Contacts, companies, etc.) where the new properties should be created. Then, we create the new properties and sync them where needed.

WAIT! Don't we need to add this information to the forms? **YES**!

We saw this as an opportunity to develop a structured form strategy. Customers are willing to provide just a little more information for each stage of your buyer's journey. Thankfully, HubSpot forms allow us to use Queued Progressive fields when we have known information to enable the ability to collect new data.

As we advance, we'll be able to collect new data on our inbound leads and prospects who engage with our content. We will have a clearer picture of marketing-generated leads and their progression through the Buyer's Journey. And **Best YET,** Sales will know which contacts are true handraisers and reach out to them right away.

Final Solution

With Lead Scoring setup, a new form strategy to support the necessary information to inform the lead scoring, the marketing team can more easily identify contacts they can engage, and sales will know the hottest leads more readily. Ultimately, increasing productivity and increasing the Opportunity to Customer (Closed Won) rate.

The team will continue to use their new form strategy on newly created content and complete a form-swapping process for their existing content.

The Spok, Inc. Marketing Team now has a dashboard that shows how lead scoring works and flags items for review and further inspection.

They are now empowered and will demonstrate their contribution to the company's success to the leadership team.

Of course, this will begin sales and marketing alignment and open the door to better cross-functional collaboration and outcomes.

HubSpot Tools Used

- Dashboards & Reports
- Custom Report Builder
- Contact and Company Objects
- Contact and Company Properties
- Forms
- Landing Pages
- CTAs
- Email
- Workflows
- Projects

About Spok, Inc.

Spok, Inc. is the powerhouse behind more than 2,200 hospitals and healthcare systems providing communication services for clinical communications. Their customers send over 100 million messages monthly and depend on strong and capable communication systems to ensure patient safety.