



## E-Marketing for Microsoft Dynamics CRM

# Advanced Lead Scoring For B2B Companies


## LEAD ANALYZER


c360 Solutions E-Marketing is an integrated eMarketing platform that enables ALL forms of lead and demand generation activity. The Lead Analyzer module is an advanced solution for B2B companies to automate the flow of leads from capture to closure. The Lead Analyzer provides for robust Lead Scoring and Lead Routing in a user-friendly, non-technical interface.


### Lead Scoring


c360 Lead Analyzer allows users to configure advanced scoring rules with the click of a mouse. Users select the type of data they wish to score on and assign value to the various data points in each category. Lead Analyzer provides for scoring on four sets of data gathered by the marketing platform.

Time on Site in one session	Enabled	Time (secs)	Points	Remove
	<input checked="" type="checkbox"/>	600	10	
Number of Page Views in one session.	Enabled	Count	Points	Remove
	<input checked="" type="checkbox"/>	5	10	

 **Web Analytics** – Score on individual and company web browsing activity including time spent on one session, pages visited, lifetime visits, downloads, key pages, referring domains and location to name a few.

 **Campaign Response** – Score leads on how often they engage with your outbound email campaigns. Here you can score on "opens" and "clicks" of any campaign.

 **Forms & Dialogs** – Scoring on the completeness and accuracy of data provided is valuable to the efficacy of your scoring model. c360 also allows for users to assign different values to multiple choice questions/answers. If someone answers Question A one way, they receive a point value of X; Question B another way, a point value of Y.

 **Demographic/Profile** – Score on demographic information such as title, location, email validity....etc. Scoring is available on both contact and account/company levels.

Scoring profiles in c360 are fluid and companies can manage multiple profiles by campaign, campaign type, region, product and time period.

## LEAD ROUTING

Once you define the scoring rules, you are now ready to take the next step and start routing your leads to the appropriate channel. With c360, you can use the simple interface shown below to set up routing rules for leads based on what “interest group” they fall into. Interest groups are pre-set scoring ranges. There is no logical limit to the amount of interest groups a company can use but most settle on between 3-6 groups.

Once a lead falls into a particular group for the first time, a simple check box defines the action(s) you take on the lead. The actions are dependent upon group entry. Once a lead scores out of a group (up or down) they are removed from the action and the actions for the new group will apply.

Dashboards eMarketing Web Forensics Lead Analyzer eDialog CRM Reports Admin

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Lead Routing <span style="float: right;">Save All</span>										
Group Name	Begin Range	End Range*	Log Activity	Send Alert	Add Task	Add Lead	Add Opportunity	Add To Trigger	Trigger Name	Remove
Very Low	0	24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Choose One...	
Medium Interest	25	99	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Choose One...	
High Interest	100	500	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Choose One...	
Trigger Campaign	501	999	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Choose One...	

\* For Max End Range, enter 999

### Routing Actions

- ⇒ Log Activity – logs any website activity in the record in c360 and in Microsoft Dynamics CRM.
- ⇒ Send Alert – sends an email to designated personnel that c360 has detected activity.
- ⇒ Add Task – adds a sales follow up task assigned to the sales representative in the CRM (phone call, follow up, etc).
- ⇒ Add Lead – creates a new lead in CRM (if lead does not exist) or it will append existing leads.
- ⇒ Add Opportunity – creates a new opportunity for the sales representative in CRM.
- ⇒ Add to Trigger – enrolls the lead in a pre-built trigger email marketing campaign.