MarTech Whitepaper

LeadScore™

An Automated Lead Scoring System Using Make and Airtable

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Content

Introduction

Given the limited nature of resources, such as time, finances and manpower, the highest-ROI course for any agency is to prioritise leads effectively and focus on the most important accounts at any given time.

For this, lead scoring is a proven method that uses lead data to identify which potential customers are more likely to convert, ensuring that sales teams focus on the most valuable prospects.

However, traditional lead scoring systems often rely on manual processes or expensive CRM software, leading to delays in scoring, inefficiencies and unnecessary manual labour.

LeadScore™ is an **automated lead scoring system** that listens for signals from leads and prospects—such as website visits, email opens, social media engagement, etc—and assigns a score (or updates existing score) to contacts on a list, based on the assigned weight of each signal.

This approach streamlines the lead management process, ensuring that businesses can effectively score leads based on real-time data from multiple sources, automatically.

LeadScore™ is easy to build using **Make** (formerly Integromat), **Airtable**, and public **APIs** of the different data sources (e.g. socials, CRM, web analytics).

Why Automate Lead Scoring?

An automated lead scoring system improves the efficiency of sales teams by:

- **Reducing manual effort**
  Automating the collection and evaluation of lead data from various platforms eliminates the need for manual effort.

- **Increasing accuracy**
  Real-time scoring ensures that no valuable lead slips through the cracks.

- **Improving response time**
  With notifications and automatic follow-ups, hot leads receive timely attention from sales teams.

- **Personalising outreach**
  Tailored follow-up actions based on lead behavior increase engagement and conversion.

Using tools like Make and Airtable allows businesses to automate lead scoring without investing in expensive CRM systems, making it accessible to smaller businesses or teams with limited technical resources.

Components of the Automated System

- **Airtable for Lead Data Storage and Scoring**
  - Airtable serves as the central database where all lead data is collected and stored.

  - Each lead is assigned a score based on factors such as demographic information, behavioral data, and firmographics.

  - Automated scoring rules in Airtable allow dynamic updates to the lead score as new information is received.

- **Make for Workflow Automation**
  - Make acts as the automation engine, integrating various platforms like email marketing tools, CRM systems, and website analytics.

  - Triggers and actions in Make update the lead's Airtable record in real time, ensuring that the score reflects the latest interactions and behaviors.

  - Follow-up actions like email campaigns or sales alerts can be automated once certain lead scores are met.

Step-by-Step Guide:

Building the Automated Lead Scoring System

Step 1: Define Your Lead Scoring Criteria

Before building the system, it is important to define what factors contribute to a lead's value. Common criteria include:

- **Demographics**
  Job title, company size, industry.

- **Engagement Metrics**
  Email opens, website visits, form submissions, content downloads.

- **Behavioral Data**
  Time spent on website, specific page views, interactions with your brand.

- **Firmographics**
  Company revenue, number of employees, location.

Each criterion should be assigned a score, which will be used in the final lead evaluation.

Step 2: Set Up Airtable as Your Lead Database

Create a new Airtable Base with the following fields:

- **Lead Information**
  Name, email, company, job title, etc.

- **Engagement Data**
  Email opens, clicks, website visits, content downloads.

- **Lead Score**
  This is a formula field where the final score will be calculated.

<u>Example formula:</u>

```
Lead Score = (IF({Job Title} = "CEO", 10, 0) +
IF({Company Size} > 500, 5, 0) + {Website Visits} * 2
+ {Email Opens} * 1)

// This formula dynamically updates the lead score as new data
is fed into Airtable.
```

Step 3: Integrate External Data Sources Using Make

Make allows for seamless integration between Airtable and external data sources:

- **Email Marketing**

  Connect your email marketing tool (e.g., Mailchimp, ActiveCampaign, Sendgrid) to automatically update the lead's Airtable record based on email opens and clicks.

- **Website Analytics**

  Integrate with website analytics tools (e.g., Google Analytics) to track lead behavior on your site. For example, every time a lead visits your site or views a key page, the lead score is updated in Airtable.

- **CRM**

  Sync your CRM (e.g., HubSpot, Salesforce) with Airtable to ensure all customer interactions contribute to the lead score.

Step 4: Automate the Scoring Process in Airtable

Once your data sources are connected, set up Airtable's formula fields to calculate the lead score in real time. As new interactions occur (e.g., emails opened, visits to specific pages), Airtable will automatically adjust the score.

Step 5: Trigger Automations Based on Lead Scores

Use Make to set up triggers and workflows that activate when a lead reaches a certain score threshold:

- **Sales Alerts**

  Send a Slack or email notification to the sales team when a lead's score crosses a pre-defined threshold.

- **Follow-up Emails**

  Automatically send a follow-up email or personalized campaign to leads that show high engagement but haven't yet converted.

Benefits of an Automated Lead Scoring System

- **Efficiency**

  Sales teams no longer need to track or evaluate leads manually, allowing them to identify and focus on high-value prospects quickly and easily.

- **Accuracy**

  Real-time, automated updates ensure that the lead score reflects the most current data and is free from error, improving reliability and decision-making value.

- **Scalability**

  The system can handle a large volume of leads without added manual effort, making it ideal for growing teams and agencies.

- **Personalisation**

  Automated follow-ups and nurturing campaigns can be tailored to each lead's behavior, improving engagement and conversion rates.

Conclusion

By implementing an automated lead scoring system using Make and Airtable, agencies can streamline their lead management process, improve the accuracy of their lead evaluations, and ensure timely, personalised follow-up actions.

This approach empowers sales teams to focus on high-value prospects and increases overall sales efficiency.

LeadScore™ is a cost-effective solution for businesses of all sizes, eliminating the need for expensive CRM systems while providing robust automation and scalability.

About the Author

As a low-code developer & automation specialist, Oku-obong Ntuk develops intelligent automations for key marketing tasks, like lead management, campaign tracking and dynamic advertising.

He builds custom software, internal tools and interactive dashboards that make it easy to visualise data and manage digital marketing campaigns, helping digital teams save time, work more efficiently, and stay organised.

His work helps digital agencies achieve operational efficiency and drive growth.

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