

## Sirius Decisions Scoring Program Overview

The Sirius Decisions Scoring Program is built to support the standard Sirius Decisions Scoring Model, including the implicit and explicit scoring rules and matrixed lead assignment. The program can be edited to support non-standard implementations, but the workflows (Smart Campaigns) would need to be adjusted in such cases. Non-standard implementations would include different scoring values associated with various actions, changes to the matrix that assigns the overall rank, and more.

Following are the requirements (or pre-requisites) for the Sirius Decisions Scoring Program to work out of the box, supporting the standard Sirius model:

### Explicit Scoring

- **Job Level** field
  - Custom Marketo field
  - With the following values:
    - CXO, VP, Director, Manager, Specialist, Consultant and Coordinator
  - **Note:** Job Level is a different field than Job Title. In the Sirius Decision Scoring Program, there is a Smart Campaign that looks at many disparate job titles and normalizes them into the Job Level categories you see above.
- **Industry** field
  - With the following values:
    - Software, Manufacturing, Healthcare, Government, Natural Resources, Chemicals, Education
- **Department** field
  - With the following values:
    - Marketing, Sales, IT, HR, Legal
- **Region** field
  - With the following values:
    - NA, EMEA, Asia (to specifically categorize these three regions)
    - **Note:** Other field values are allowed, as long as the three above are consistent across the database.
- **Num Employees** field
  - Confirm that this standard Marketo field exists in your Marketo database as a number field and that numeric values are used for field values.
  - **Note:** if a different field contains the number of employees at a company, that field can be used in place of the standard Num Employees field, but the field reference

will need to be changed in all the 'Set Employee Range...' Smart Campaigns. To change what field is referenced, go to Sirius Decisions Scoring Model / Explicit Scoring Rules / Employees / Set Employee Range. Then go into each Smart Campaign and change the Smart List attribute for each from Num Employees to the alternative field.

- **Employee Size** field
  - Custom field within Marketo, type 'String'

## Implicit Scoring

- The following 8 custom fields, type 'Score' need to be added to Marketo
  - Booth Conversation, Booth Visit, Seminar Attendance, Web Activity High Value, Web Activity Std Value, Webinar Attendance, Webinar Registration, White Paper Download
  - **Note:** the field names must be an exact match to the above names
- Some of the Sirius Scoring Model triggers for implicit behaviors are tied to changes in standard Marketo program statuses. Therefore, ensure that you use the same standard Marketo program statuses as follows:
  - Booth Visit = change in program status to: **Tradeshow > Visited Booth**
  - Booth Conversation = change in program status to: **Tradeshow > Influenced**
  - Seminar Attendance = change in program status to: **Roadshow > Attended**
  - Webinar Registration = change in program status to: **Webinar > Registered**
  - Webinar Attendance = change in program status to: **Webinar > Attended**
  - White Paper Download = change in program status to: **White Paper > Downloaded**
  - **Note:** if you use different program statuses to represent such behaviors in Marketo, you will need to go into the following campaigns and change the program status reference in the trigger:
    - Sirius Decisions Scoring Model / Implicit Scoring Rules / In Person Events / In-Person Event Counters / **Booth Visit**
    - Sirius Decisions Scoring Model / Implicit Scoring Rules / In Person Events / In-Person Event Counters / **Booth Conversation**
    - Sirius Decisions Scoring Model / Implicit Scoring Rules / In Person Events / In-Person Event Counters / **Seminar Attendance**
    - Sirius Decisions Scoring Model / Implicit Scoring Rules / Webinars / **Registered for Webinar**

- Sirius Decisions Scoring Model / Implicit Scoring Rules / Webinars / **Attended Webinar**
- Sirius Decisions Scoring Model / Implicit Scoring Rules / White Papers / **White Paper Download Counter**

#### ○ **High Value Web Pages**

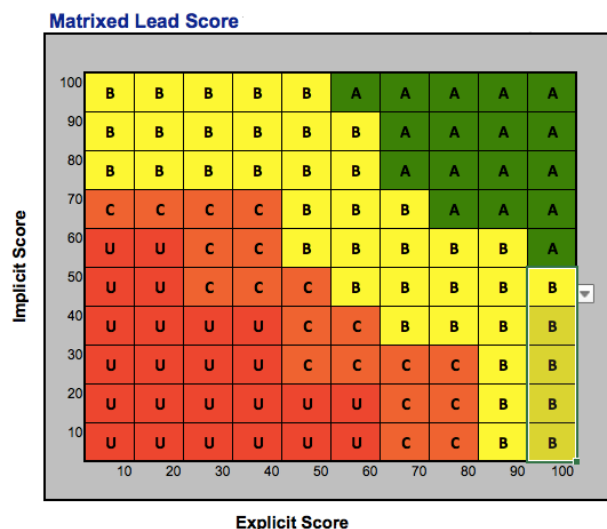
- Define the high value web pages by going to Sirius Scoring Model / Implicit Scoring Rules / Web Activity / High Value Web Pages and in the 'High Value Webpage Counter' Smart Campaign, enter the URLs for high value pages in the 'Visits Web Page' Smart List trigger.
- **Note:** you can choose to use 'contains' or 'is' for the trigger rule, but if using 'is', ensure you put the entire URL. You could also pull a second 'Visits Web Page' trigger and use 'is' for one of the triggers, and 'contains' for the other.

#### ○ **Standard Value Web Pages**

- Define the standard value web pages by going to Sirius Scoring Model / Implicit Scoring Rules / Web Activity / Standard Value Web Pages and in the 'Std Value Webpage Counter' Smart Campaign, enter the URLs for standard value pages in the 'Visits Web Page' Smart List trigger.
- **Note:** you can choose to use 'contains' or 'is' for the trigger rule, but if using 'is', ensure you put the entire URL. You could also pull a second 'Visits Web Page' trigger and use 'is' for one of the triggers, and 'contains' for the other.

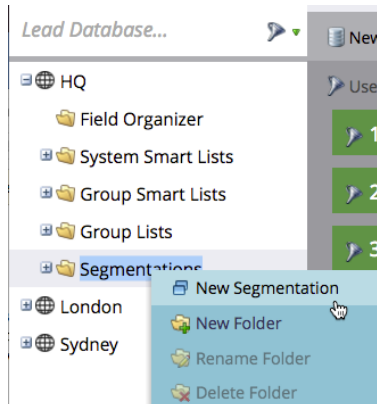
## **Matrix Lead Scoring**

The matrixed lead scoring component of the Sirius Decisions Scoring Model is handled by Marketo's segmentation. As a lead's implicit and explicit scores change, the segmentation rules evaluate the scores and, if appropriate, change the segmentation from A, B, C or U, as per the Sirius Matrixed Lead Score



seen here.

In order to enable the matrixed scoring in Marketo, create a segmentation in Marketo called 'Sirius Rank', with segments for A, B, C and U as follows (the Default will be created automatically).



First create the new segmentation:

Ord...	Segment
1.	A
2.	B
3.	C
4.	U
5.	Default

Then create the segments (Default is created automatically):

Here are the rules for each Segmentation, within the Segmentation Smart List.

For Segmentation A, we will provide more detailed instructions, which you can then repeat using the Smart List settings and filter rules for B, C and U on the next few pages.

**Note:** be sure to use the 'between' operator, which will enable you to enter the range for each.

**Note:** notice that the filters alternate between Implicit and Explicit.

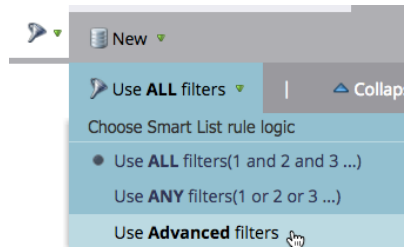
**Click on Segment A in the tree, then click on the Smart List tab within the segment.**

Segmentation Smart List for A

Create the following by dragging in multiple Implicit filters and multiple Explicit filters and alternating them as shown here:

1 - Implicit	Implicit between 91 - 100	⬇
2 - Explicit	Explicit between 51 - 60	⬇
3 - Implicit	Implicit between 71 - 100	⬇
4 - Explicit	Explicit between 61 - 70	⬇
5 - Implicit	Implicit between 61 - 100	⬇
6 - Explicit	Explicit between 71 - 100	⬇
7 - Implicit	Implicit between 51 - 60	⬇
8 - Explicit	Explicit between 91 - 100	⬇

For the Segmentation Smart List filter logic, change the drop down to 'Use Advanced Filters', like this:



In the Advance Filter field for A, enter the following:

**(1 and 2) or (3 and 4) or (5 and 6) or (7 and 8)**

Follow the instructions on the next 3 pages for segments B, C and U as follows:

## Segmentation Smart List for B

▶ 1 - Implicit	Implicit between 71 - 100	⬇
▶ 2 - Explicit	Explicit between 1 - 40	⬇
▶ 3 - Implicit	Implicit between 51 - 100	⬇
▶ 4 - Explicit	Explicit between 41 - 50	⬇
▶ 5 - Implicit	Implicit between 1 - 50	⬇
▶ 6 - Explicit	Explicit between 91 - 100	⬇
▶ 7 - Implicit	Implicit between 1 - 60	⬇
▶ 8 - Explicit	Explicit between 81 - 90	⬇
▶ 9 - Implicit	Implicit between 31 - 70	⬇
▶ 10 - Explicit	Explicit between 61 - 70	⬇
▶ 11 - Implicit	Implicit between 41 - 90	⬇
▶ 12 - Explicit	Explicit between 51 - 60	⬇

## Advanced Filter Rule for B:

(1 and 2) or (3 and 4) or (5 and 6) or (7 and 8) or (9 and 10) or (11 and 12)

## Segmentation Smart List for C

▶ 1 - Implicit	Implicit between 1 - 30	↓
▶ 2 - Explicit	Explicit between 61 - 80	↓
▶ 3 - Implicit	Implicit between 21 - 40	↓
▶ 4 - Explicit	Explicit between 51 - 60	↓
▶ 5 - Implicit	Implicit between 21 - 50	↓
▶ 6 - Explicit	Explicit between 41 - 50	↓
▶ 7 - Implicit	Implicit between 61 - 70	↓
▶ 8 - Explicit	Explicit between 1 - 20	↓
▶ 9 - Implicit	Implicit between 41 - 70	↓
▶ 10 - Explicit	Explicit between 21 - 40	↓

### Advanced Filter Rule for C:

(1 and 2) or (3 and 4) or (5 and 6) or (7 and 8) or (9 and 10)



## Segmentation Smart List for U

▶ 1 - Implicit	Implicit between 1 - 20	⬇
▶ 2 - Explicit	Explicit between 41 - 60	⬇
▶ 3 - Implicit	Implicit between 1 - 40	⬇
▶ 4 - Explicit	Explicit between 21 - 40	⬇
▶ 5 - Implicit	Implicit between 1 - 60	⬇
▶ 6 - Explicit	Explicit between 1 - 20	⬇

### Advanced Filter Rule for U:

(1 and 2) or (3 and 4) or (5 and 6)

**After you finish creating the segmentations, right click on the Sirius View segmentation in the tree and select 'Approve'**

**Note:** it might take some time to approve, so be patient as this is a one-time operation.

## Lead Routing

Lead routing in the Sirius Decisions Scoring Model is based on a lead changing membership from segment to segment, such as moving from B to A, or B to C, etc.

It is up to you to decide the exact workflow that should be triggered based on these changes; however, we've built some basic rules as a starting point.

Go to Sirius Scoring Model / Lead Routing to view the 4 Smart Campaigns setup for lead routing. They are:

- Send to Field Sales – when a lead becomes a member of **Segment A**
- Send to Telemarketing – when a lead becomes a member of **Segment B**
- Marketing MQL Nurturing – when a lead becomes a member of **Segment C**
- Marketing Long-term Nurture – when a lead becomes a member of **Segment U**

To change the flow for each condition, simply open the appropriate Smart Campaign referenced above, and edit the flow.

Also included within the Lead Routing folder are a few sample alerts. The emails are blank, but were created as placeholders.