# Lead Scoring Logic Flow (Salesforce CRM)

## 🔹 Step 1: Firmographic Scoring

Assign points based on how closely a lead matches your Ideal Customer Profile (ICP).

|  |  |  |
| --- | --- | --- |
| Criteria | Rule | Points |
| Industry | Target industry (e.g., Manufacturing) | +10 |
| Company Size | 50–500 employees | +8 |
| Annual Revenue | $10M–$100M | +6 |
| Title/Role | Decision-maker (e.g., VP, Director) | +10 |
| Region | Target geography | +5 |

Max Firmographic Score: 39

## 🔹 Step 2: Behavioral Scoring

Assign points based on how engaged the lead is with your brand.

|  |  |  |
| --- | --- | --- |
| Behavior | Rule | Points |
| Website Visits | ≥3 visits in 7 days | +7 |
| Email Opens | Opened ≥2 emails | +5 |
| Form Submissions | Downloaded a resource | +10 |
| Demo Request | Requested product demo | +15 |
| Webinar Attendance | Attended live or watched replay | +8 |
| Clicked Ads | Clicked campaign ad | +3 |

Max Behavioral Score: 48

## 🔹 Step 3: Negative Scoring (Optional)

Deduct points for non-ICP behaviors.

|  |  |  |
| --- | --- | --- |
| Behavior | Rule | Points |
| Bounced Email | Undeliverable address | -10 |
| Unsubscribed | From marketing emails | -10 |
| Job Title | Intern / Assistant | -5 |
| Generic Email | e.g., info@company.com | -3 |

## 🔹 Step 4: Score Tiers + Routing

|  |  |  |
| --- | --- | --- |
| Total Score | Tier | Action |
| 70+ | Hot Lead | Route to Sales (immediate) |
| 40–69 | Warm Lead | Nurture Campaign |
| <40 | Cold Lead | Low Priority / Auto Nurture |

## 🔧 How to Implement in Salesforce

- Custom Fields: Lead Score (numeric), Lead Tier (formula)  
- Salesforce Flow / Process Builder: Automate scoring on field updates  
- Reports/Dashboards: Visualize lead tiers by source, rep, region  
- Integration: Sync behavior data via Pardot, HubSpot, or API feed