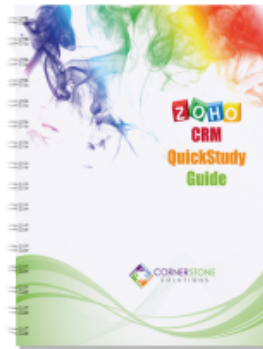


Setting Up Zoho CRM Scoring



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Need help? Set up something on my calendar
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What is Scoring?

When you have lots of Leads or Deals to follow up with, sometimes you need help in prioritizing the list. Scoring records based on specific criteria is a great way to help you quantify which records have the most promise for moving forward with a Lead, Contact, Account, or Deal.

When you create a rule set for one of these modules, you will see the calculated scores display in two places: at the right of the Business Card view and in a new Score Summary Section at the bottom of each record.

Setting Up

1. Click **Tools, Setup**, under Automation click **Scoring Rules**.
2. Select a module from the drop-down list at the top left (Leads, Contacts, Accounts, or Deals). Each module can only have one set of scoring rules. Though each rule can contain up to 25 sets of criteria. Not available in the Free Edition of Zoho CRM.
3. Click the **+Add** button to add your first criteria.
4. Continue to add criteria.
5. Click the **Run Scoring Rules for all Records** at the top of the screen.

Connecting Touchpoint Sources

In order to see the Touchpoint scores (Email or Phone or Survey or Campaigns) on a record, you must have connected them to CRM.

1. Click **Tools, Setup**:
 - a. For POP email, click **Email Settings** (under General)
 - b. For Gmail, click **Google** (under Extensions & APIs)
 - c. For Outlook, click **Others** (under Extensions & APIs) and download and install the Plug-in for Microsoft Outlook.
 - d. For Phones, click **Others** (under Extensions & APIs) and select PhoneBridge
 - e. For Zoho Survey, click **Zoho** (under Extensions & APIs) and select Zoho Survey.
 - f. For Zoho Campaigns, this must be configured from the Zoho Campaigns app side.
 - g. For Facebook and Twitter, click **Social** (under Extensions & APIs) and click **+Add Account** for each social profile.

Overview of Setting Up the Rules

- Recruit someone to help you
- Review list of recent top Closed-Won Deals, and/or
- Review list of top accounts from your accounting package
- Look for trends
- Start to develop criteria that good Leads/Deals have in common

- Create a list of all of the fields in your database
- Add any missing fields you can think of
- Send list to Employees and ask them to rate fields as Critical, Important, Some Influence, Negative, or Not Important or ask for suggested relative scores
- Ask employees for suggestions of missing fields

- Use this worksheet to define which fields you will use for adding scores to records.
- Don't add too many. Try to focus on the important ones.
- Add new fields as necessary to your database.
- Update existing picklist values for Industry or Lead Source.
- Retroactively fill in values for the records (or at least all records for the past year).

- Use the worksheet to create the Score Rules for Fields only (Tools, Setup, under Automation click Scoring Rules)
- Run the Rules
- Create or Add Fields to List views (Score, Positive Score, Negative Score)
- View the records... sort by highest scores.
- Re-review Top Leads/Deals
 - Did they have the largest scores?
 - Why did some large scores not convert?
 - What are you missing?
- Look for more trends and tweak the scores
- Rerun Rules

- Setup additional touchpoint connections where appropriate (see the previous page).
- Then add touchpoint criteria, one area at a time.
- Run Rules and test again.
- Add Touchpoint fields to List view (Touchpoint Score, Positive Touchpoint Score, Negative Touchpoint Score)
- Tweak as necessary.

Lead Touchpoints

Email Insights	Score
For every email opened (default +5 points)	
For every email clicked (default +8 points)	
For every email bounced (default -10 points)	
For every email response received (default +10 point)	

Call	Score
For every missed call (default -10 points)	

Survey	Score
For every Survey responded (default+10 points)	

Campaigns	Score
Email Opened (default +8 points)	
Email Clicked (default +10 points)	
Email Bounced (default -10 points)	

Facebook	Score
For every comment (default +10 points)	
Post liked (default +10 points)	

Twitter	Score
@Mentions (default +10 points)	
Message (default +10 points)	

Contact Touchpoints

Email Insights	Score
For every email opened (default +5 points)	
For every email clicked (default +8 points)	
For every email bounced (default -10 points)	
For every email response received (default +10 point)	

Call	Score
For every missed call (default -10 points)	

Survey	Score
For every Survey responded (default+10 points)	

Campaigns	Score
Email Opened (default +8 points)	
Email Clicked (default +10 points)	
Email Bounced (default -10 points)	

Facebook	Score
For every comment (default +10 points)	
Post liked (default +10 points)	

Twitter	Score
@Mentions (default +10 points)	
Message (default +10 points)	

