



Presented by **Ecclesiastical**

Session four:

**Tools to help you use social media
to influence lead generation**

Lead Scoring Checklist

**(how to recognise
a possible customer)**



An introduction to Lead Scoring

High levels of competition and crowded market places have made lead generation a major challenge for today's insurance brokers.

Identifying warm leads can be tricky, with most issues stemming from a lack of agreement as to what constitutes a qualified lead (a warm 'primed' customer).

At a high level, a prospect becomes a lead when they take a defined action to enter your sales funnel. In a social context – **they have engaged with your social efforts at a stage where you can begin to help them with a product.**

One way of measuring how qualified a prospect is through Lead Scoring. Meaning you'll be ranking followers and connections based on their likelihood of converting into a customer, or more simply their readiness to make a purchase.

Lead scoring can involve the use of numbers, 1-10 for example, or words like 'hot' or 'cold'.

Leads enter funnel

Cold

Warm

Hot

Sale

You'll be ranking followers and connections on their readiness to make a purchase.



Lead scoring checklist

This example checklist considers certain actions that a connection could make on social media that can feed into a lead score.



Critical (10-15 points)

- Explicitly states they are ready to buy
- Expresses a business challenge you can solve
- Mentions your company or product with positive sentiment
- Uses key terms that align with your product offering

Important (5-9 points)

- Retweets, likes, or shares your content with comments
- Clicks on a link in one of your posts
- Uses key terms that align with your company
- Follows your company or you



Influencing (1-4 points)

- Retweets, likes, or shares your content without comments
- Follows industry thought leaders
- Uses key terms that aligns with conferences or events related to your industry

Undesirable (-10 points)

- Mentions your company or product with negative sentiment
- Explicitly states they have recently purchased from a direct competitor



Now build your own checklist...

Align any actions with your objectives and consider what types of interactions mean the most to you and your business.

You may tailor the number of points depending on the social network. For example, a comment on Twitter could be worth 5 points, whereas a comment on a LinkedIn post (where you are more likely to have a business focused audience) could be worth 9 points.

Our checklist only considers behaviour on social media. However, **your checklist should also include qualifying criteria** such as:

Job title

Are they in the buying position or a key decision maker?

Industry

Do they operate in an industry that your products or services are relevant to?

Location

Is their business located in an area that your business serves?

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How to advertise on social media

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