

Lifecycle Stage	Marketing				Sales		Service		Other
	Visitor	Subscriber	Lead	MQL	SQL	Opportunity	Customer	Evangelist	
Definition [1]	Anyone coming to the website regardless of channel	Anyone who has filled out any form.	Someone who matches our ICP and MQL demographics but hasn't yet exhibited behaviors to show enough buying intent DEMOGRAPHICS - Geo location - Company Size - Persona	Meets "Lead" criteria and has a lead score of 100+	Contact has been made (ie. Discovery meeting booked) and prospect has NOT been otherwise disqualified	HS deal associated with contact record	Signed contract	Has helped to spread the good word about the product/service	Disqualified or asked to be removed
Contact Owner [3]	N/A	Marketer	Marketer	Sales Person	Sales Person	Sales Person	Service Person	Service Person	Marketer
Data Indicators [4]	Visits any pixelated page	Fills any form	Fills contact form Provides data matching our MQL demographic criteria: -- Role -- Company size -- Geography -- Industry	HubSpot score reaches 100+ and marketer verifies demographic match on contact record	Deal card created in discovery pipeline --OR-- Associated deal card is marked as "Closed Lost"	Deal card moved to "Closed Won" stage of Discovery pipeline. This initiates a new deal card in the first stage of the appropriate Opportunities pipeline.	Deal stage is marked as closed won.	Manual lifecycle stage change at the contact level	Discovery deal card is moved to "Disqualified" stage --OR-- Manually updated by sales person
Behavioral Indicators [5]	--	--	--	--	--	--	--	- left a review - gave a referral - filled out NPS - volunteered for case study - backlink or on-site promo - guest blog - featured in newsletter	--
Change Trigger [6]	N/A	Utility workflow - Enrollment criteria should be "Create Date" is known.	Utility workflow - Enrollment should be demographic data match.	Utility workflow - Marketing and Sales teams notified when HubSpot score > 100	--	--	--	--	--
Lead Statuses	--	--	--	-- New -- Working	-- Qualified	-- Opportunity	-- Qualified	--	-- Disqualified
Deal Pipeline Stages	--	--	--	--	Stages of discovery pipeline	Stages of MRR/Project/Licensing pipeline	--	--	--
Expected time spent at each stage (for ideal customer)	--	--	--	--	--	--	--	--	--
Supporting Marketing Activities [2]	--	--	Marketer or BDR scrubs every incoming lead to standardise and supplement data using 3rd party tools like Zoom Info and LinkedIn	--	--	--	--	--	--
Supporting Sales Activities [7]	--	--	--	--	--	--	--	--	--
Supporting Service Tasks [8]	--	--	--	--	--	--	--	--	--
Task Assignments	--	--	--	--	--	--	--	--	--
Platform Setup [9]	Install pixels on all digital properties	Setup forms	"Update Lifecycle to Lead" Utility Workflow	--	Build a discovery pipeline	Separate out sales pipeline	--	-- NPS surveys -- Referral campaign	-- Custom field: Do Not Market to -- Utility workflow: Set as do
Segmentation Lists	--	--	Buyer persona lead list	-- Buyer persona MQL list -- Key behavioral segmentation list (ie. viewed 100 pages in 2 days)	--	--	-- Exclusion list: Customers	--	-- Exclusion list: Disqualified -- Sanitation list: mark as non-marketing contact

Link to HubSpot Score Settings		https://app.hubspot.com/property-s					
Information-Based Scoring				Behavior-Based Scoring			
Lead Criteria				Marketing Emails			
Field	Value	Points	Implemented	Action	Value	Points	Implemented
Persona/Role	[Primary Persona]	25	<input checked="" type="checkbox"/>	Opened in 60-day period	2+	10	<input checked="" type="checkbox"/>
	[Cohort/Secondary Persona]	15	<input checked="" type="checkbox"/>		0	-5	<input checked="" type="checkbox"/>
	[Unqualified Persona]	-100	<input checked="" type="checkbox"/>	Clicked in 60-day period	2+	15	<input checked="" type="checkbox"/>
Company Size	[Ideal]	20	<input type="checkbox"/>		0	-10	<input checked="" type="checkbox"/>
Location	[Ideal]	15	<input type="checkbox"/>	Forms			
Industry	[Ideal]	15	<input type="checkbox"/>	Action	Value	Points	
Additional Data				Submission	Lead Magnet	25	<input checked="" type="checkbox"/>
Profile	Value	Points			Deep Dive Content	50	<input type="checkbox"/>
Lifecycle Stage	MQL	100	<input type="checkbox"/>		Foot In the Door Offer (FITDO)	100	<input type="checkbox"/>
Phone Number	[known]	10	<input type="checkbox"/>		Subscriber	5	<input checked="" type="checkbox"/>
Urgency	7+	15	<input type="checkbox"/>	Page Visits			
Associated Company Info				Action	Value	Points	
Profile	Value	Points		[general page]	1	1	<input checked="" type="checkbox"/>
Technology	[match]	10	<input type="checkbox"/>	[service page]	1	5	<input checked="" type="checkbox"/>
				[landing page] (HubSpot)		5	<input checked="" type="checkbox"/>
				[careers]	2+	-25	<input checked="" type="checkbox"/>
				Returned to site in less than 2 weeks	3+	15	<input checked="" type="checkbox"/>
				Social			
				Action	Value	Points	
				LinkedIn Post Clicked	1	1	<input checked="" type="checkbox"/>
				Twitter Post Clicked	1	1	<input checked="" type="checkbox"/>
				Referrals			
				Action	Value	Points	
				[visit from target referral site]	1	5	<input type="checkbox"/>
				Watch Data			
				Action	Value	Points	
				Webinar Attendance	1	25	<input type="checkbox"/>
				Video Play	1	5	<input type="checkbox"/>
				Unengaged			
				Action	Value	Points	
				Hasn't visited site	>= 180 days	-25	<input checked="" type="checkbox"/>
				Hardbounce	1	-50	<input checked="" type="checkbox"/>
				Unsubscribed from all email	1	-100	<input checked="" type="checkbox"/>
				Opted out of email newsletter	1	-25	<input type="checkbox"/>