Thalox

Two-Dimensional Lead Scoring in HubSpot

Written by

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Executive Summary

Lead scoring has long been a crucial component of the sales and marketing process, helping businesses prioritize and focus their efforts on the most promising leads. However, traditional lead scoring methods often fall short in providing a comprehensive view of a lead's potential.

This whitepaper explores the concept of **Two-Dimensional Lead Scoring**, a more advanced approach that combines behavioural and demographic data to yield a more accurate assessment of lead quality. We discuss its components, implementation, benefits, and challenges.

After the general introduction and discussion, we will show how to set this up in HubSpot.

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Introduction

In today's highly competitive business landscape, understanding your leads and prospects is paramount to success. Traditional lead scoring has been a reliable tool for sales and marketing teams to identify and prioritize leads based on specific criteria. However, as customer data becomes more readily available and complex, a more nuanced approach is necessary. As things are constantly changing, it is essential to establish a specific timeframe for revisiting your scoring model.

Two-Dimensional Lead Scoring is an innovative method that considers both behavioural and demographic data when evaluating leads. By combining these two dimensions, businesses gain a more comprehensive view of their potential customers, enabling more precise targeting and personalized engagement.

The system assesses leads based on two primary factors: their alignment with your ideal customer profile and their interactions and behaviors with the brand. Behavioral "fit" is rated on a scale from 1 (indicating high activity) to 4 (reflecting low activity), while demographic "fit" is represented using letters, with "A" (closest to your ICP) and "D" (farthest) for evaluation.
An example could look like this:

Ideal Lead = A1

Date range: All time

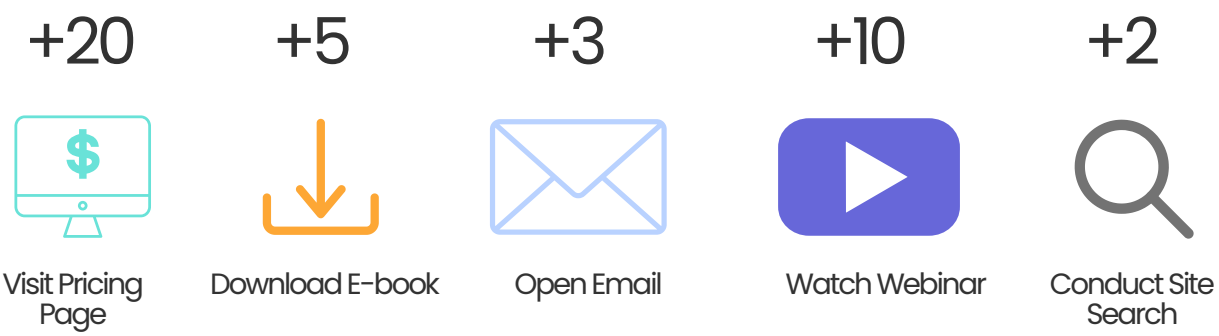
HUBSPOT IMPLIZIT CONS	A	B	C	D	TOTAL
1	0	357	2.201	571	3.129
2	1	740	4.748	1.257	6.746
3	1	261	818	86	1.166
4	0	58	101	5	164
Report Total	**2**	**1.416**	**7.868**	**1.919**	**11.205**

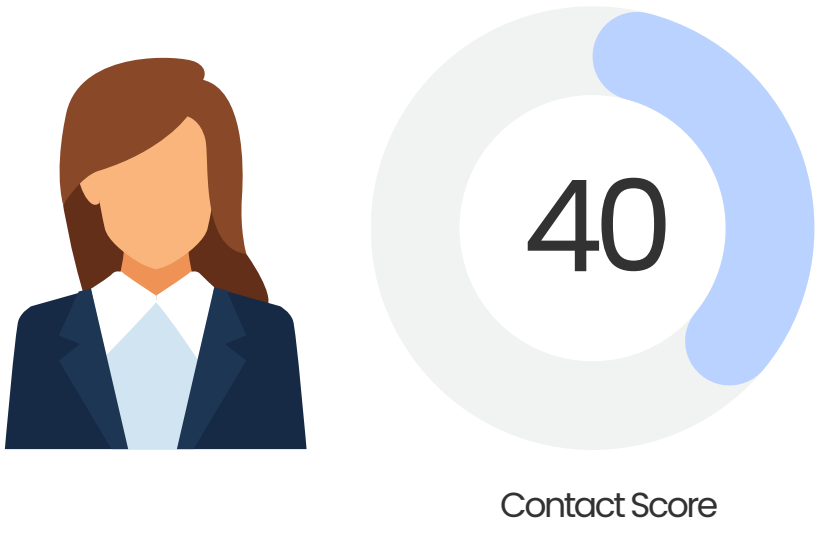
Traditional Lead Scoring

Traditional lead scoring typically relies on one dimension, often behavioral data alone. Behavioral scoring assesses a lead's engagement with a company's digital assets, such as website visits, email opens, and content downloads.

This approach is valuable but may miss vital information about a lead's fit for a product or service. Or the behavioural data and the demographic data is combined in one single number which makes it hard for the sales team to see immediately where to focus on this specific lead. This costs time and money.

For example:

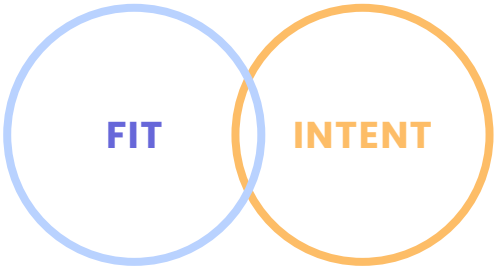




The Need for Two-Dimensional Lead Scoring

The limitations of traditional lead scoring have become increasingly apparent. It often fails to differentiate between leads who are highly engaged but not an ideal fit for the product and those who might be a perfect fit but have shown minimal engagement.

Two-Dimensional Lead Scoring addresses this gap by considering both behavioral and demographic data.



Components

Behavioral Scoring

Behavioral scoring evaluates a lead's interactions with a company's digital channels. This includes factors like:

- Website visits and pages viewed
- Email opens and click-through rates
- Social media engagement
- Content downloads
- Form submissions

Behavioral scoring helps identify leads actively interested in a company's offerings.

Two-Dimensional Lead Scoring

Demographic Scoring

Demographic scoring focuses on lead characteristics.
This can include:

- **Company size and industry**
- **Job title and seniority**
- **Geographic location**
- **Budget and purchase authority**

For exemple:

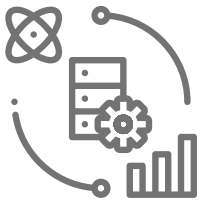
Property	Value	Points
Job title	C-Level, VP	+13
Company revenue	$250M+	+17
Industry	Fintech	+20
Location	US or Canada	+10

Demographic scoring provides insights into whether a lead aligns with the target customer profile.

To define the right parameters we recommend to establish a “contract” between marketing and sales and align on those and also define a time period to revisit them.

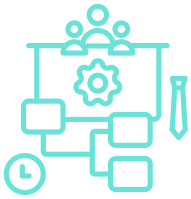
Implementation and Data Integration

To implement Two-Dimensional Lead Scoring effectively, businesses need to integrate and analyse behavioural and demographic data seamlessly. This involves:



Data Collection

Gathering behavioural data through tracking tools and demographic data from lead forms and external sources.



Data Integration

Combining and centralizing data into a unified database or Customer Relationship Management (CRM) system.



Scoring Algorithms

Developing algorithms that weigh and evaluate the importance of each dimension based on specific business objectives.



Regular Updates

Continuously updating lead scores as new data becomes available.

Benefits of Two-Dimensional Lead Scoring

Increased precision

By considering both behavioural and demographic data, Two-Dimensional Lead Scoring provides a more accurate assessment of lead quality.

Improved lead nurturing

Targeted and personalized engagement strategies based on lead scores lead to higher conversion rates.

Better resource allocation

Sales and marketing teams can focus their efforts on leads with the highest potential, optimizing resource allocation

Enhanced customer segmentation

A more nuanced understanding of leads allows for more refined customer segmentation strategies.

Challenges and Considerations

While Two-Dimensional Lead Scoring offers substantial advantages, businesses should be aware of potential challenges, such as:

- **Data quality**: Inaccurate or incomplete data can lead to flawed scoring.
- **Privacy concerns**: Handling and analysing demographic data requires careful consideration of data privacy regulations.
- **Algorithm complexity**: Developing and maintaining scoring algorithms can be resource intensive.

How to Implement Two-Dimensional Lead Scoring

Before you start setting up your Two-Dimensional Scoring in HubSpot you should talk with sales to define the Ideal Customer Profile and rate the actions and data points where you want to score on.

Click on the following article and video to see how to set up a general scoring model in HubSpot:



Important Note: Score Properties Have Been Replaced

As of August 31, 2025, score properties have been replaced by new scoring tools. You can no longer create, edit, or update score properties. To continue scoring contacts and customers, use the following tools:

- Lead Scoring Tool – Build scores based on engagement and fit criteria. Available in Marketing Hub and Sales Hub Professional or Enterprise.
- Customer Health Scores – Analyze customer health in the Customer Success Workspace. Available in Service Hub Professional or Enterprise.

👉 Learn how to migrate your score properties and watch demo videos on the HubSpot Community

👉 Explore our eBook about the lead scoring tool to get started

Two-Dimensional Lead Scoring

Since you have understood how to setup a general scoring model in HubSpot it will be easy to set up a Two-Dimensional Lead Scoring in HubSpot and finally create a report.

First step is to create two new scoring properties which we will name HubSpot Score Explicit for the demographic data and HubSpot Score Implicit for the behavioural data:

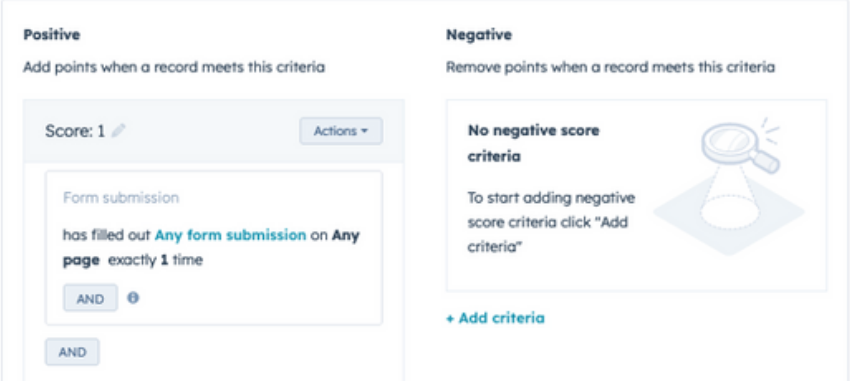


*If you do not have access to create new properties, please reach out to your HubSpot admin.

If you already have a scoring model in place you are also able to copy (clone) your existing scoring field including all the parameters in there. Afterwards you just need to delete either the demographic or the behavioural parameters, to have the demographic and the behavioural parameters separated.

Two-Dimensional Lead Scoring

After having created those two new fields start giving points to the different parameters like in this example:

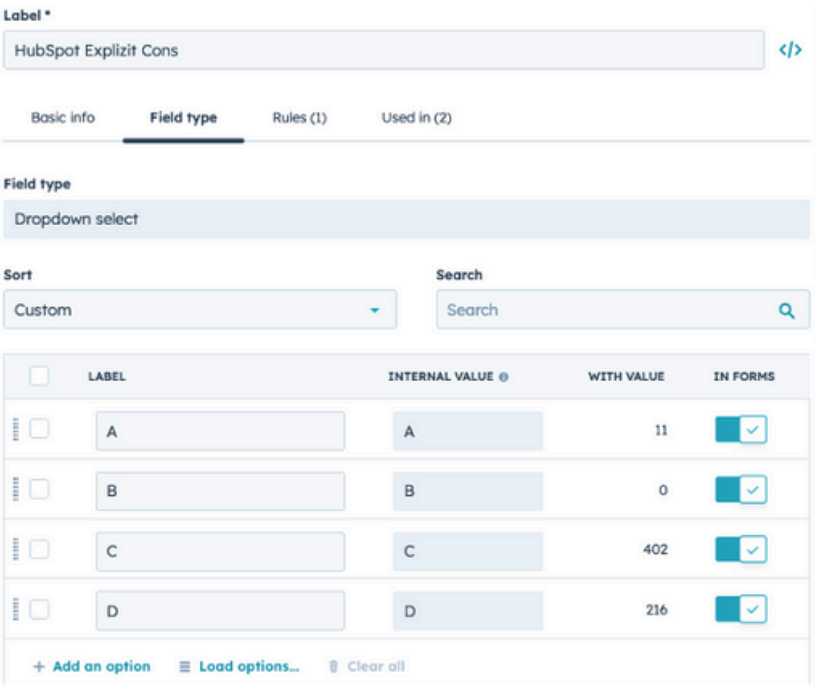


*I'm not a big fan of giving negative points but if you like you can do that.

Please note the maximum points a contact / lead could gain – in our example the maximum score for explicit score is 20 as well as for the implicit score. This is important for the next step.

Since you now have an implicit and explicit score field in place, you have to decide how to name the aggregated property. We named our properties the following:

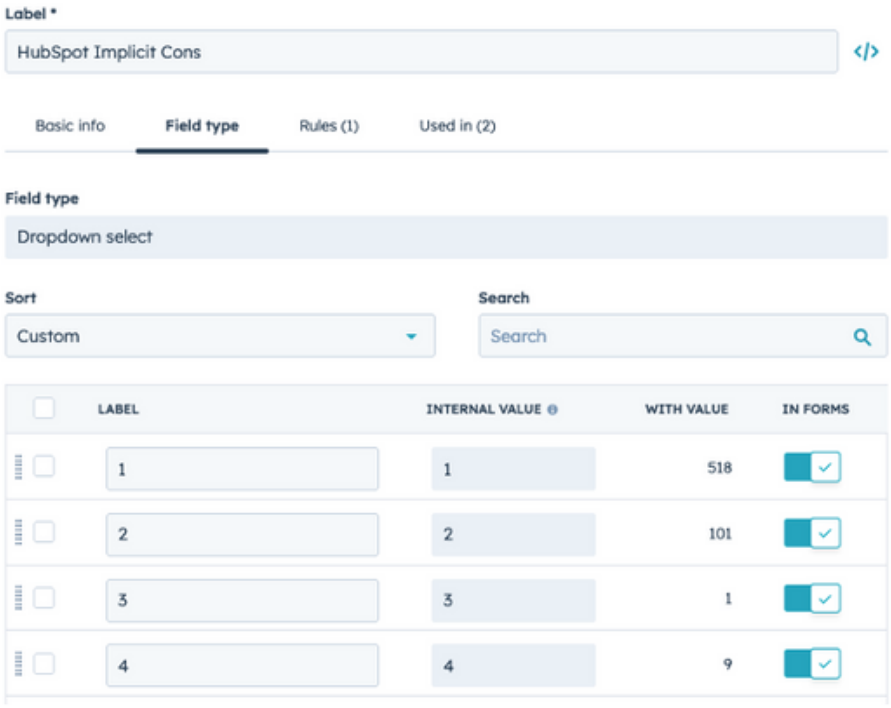




We decided to go for a dropdown select field to avoid any manual manipulation which could happen through a simple open text field.

Two-Dimensional Lead Scoring

The implicit values are 1, 2, 3, 4 where **4 is the best "fit"** and **1 the "worst".**



Now you must decide at which score in the specific field you want to assign a new consolidated value. We recommend starting simple and start with 25% steps for each field (implicit and explicit). In our example that would be like this:

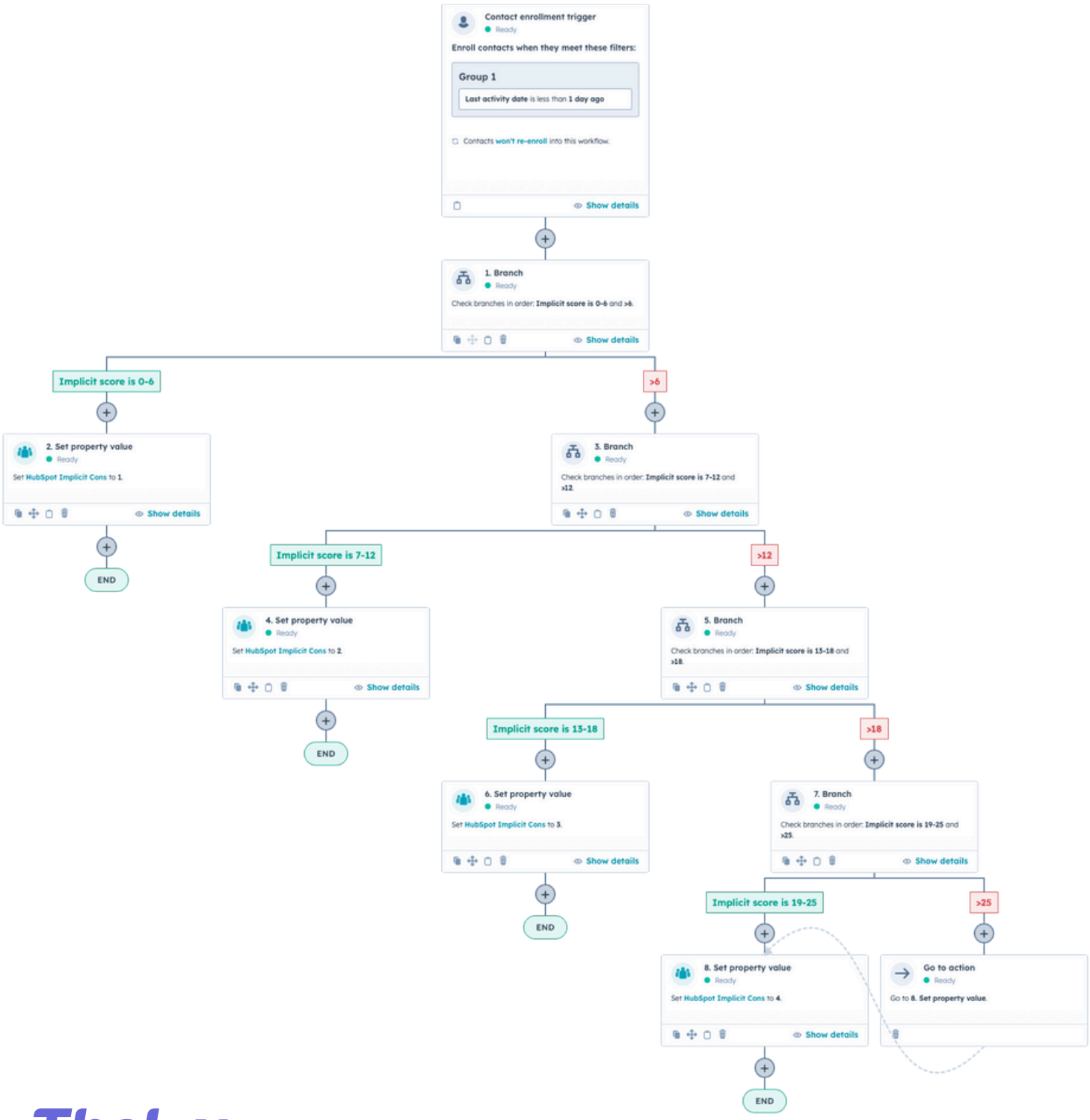
Maximum: 20	HubSpot Score Explicit	Value HubSpot Explicit Cons
0% - 25%	0 - 5	D
26% - 50%	6 - 10	C
51% - 75%	11 - 15	B
76% - 100%	16 - 20	A

Maximum: 20	HubSpot Score Implicit	Value HubSpot Implicit Cons
0% - 25%	0 - 5	1
26% - 50%	6 - 10	2
51% - 75%	11 - 15	3
76% - 100%	16 - 20	4

Two-Dimensional Lead Scoring

Now you are all set to create a workflow which assigns the new values to the “Cons” fields when a certain threshold is met.

A program could look like this for the implicit scoring:



Two-Dimensional Lead Scoring

Since the graphic is for sure hard to read it is always about asking the value of the implicit score field in a branch and then use the function “Set contact property value” to a certain value. The “No” path will always ask for the next threshold level as shown above.

Clone the workflow and do the same for the explicit information you like to consolidate.

If you are a HubSpot professional you could also use a calculated properties instead of using the workflow described above.

To learn more about calculated properties click here.



These would be the formulas for calculated fields:

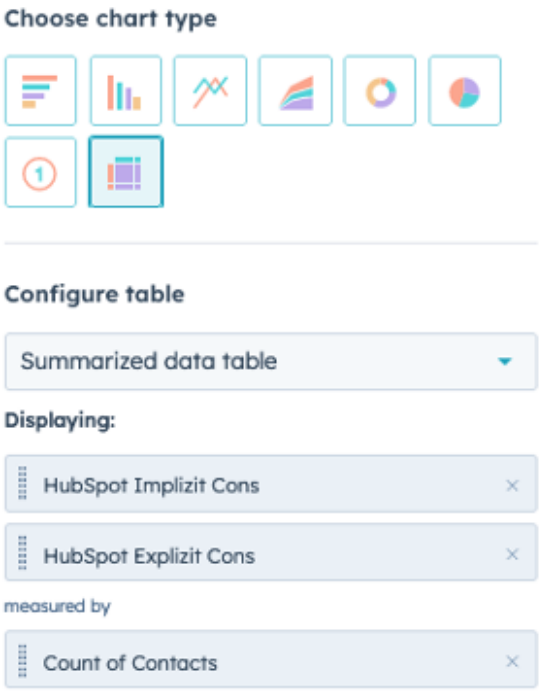
if(([properties.hubspot_score_explizit] > 15), "A",
if((([properties.hubspot_score_explizit] < 16) &&
([properties.hubspot_score_explizit] > 10)), "B",
if((([properties.hubspot_score_explizit] < 11) &&
([properties.hubspot_score_explizit] > 5)), "C", "D")))

if(([properties.hubspot_score_implizit] > 15), 4,
if((([properties.hubspot_score_implizit] < 16) &&
([properties.hubspot_score_implizit] > 10)), 3,
if((([properties.hubspot_score_implizit] < 11) &&
([properties.hubspot_score_implizit] > 5)), 2, 1)))

The explicit values are A, B, C, D where **A is the best “fit” and D the “worst”**.

Two-Dimensional Lead Scoring

Last step is to create a report. Just drag and drop the two fields “HubSpot Explicit Cons” and “HubSpot Implicit Cons” in an individual report and you are all set:



The result of the report should look like this:

Date range: All time

HUBSPOT IMPLIZIT CONS	A	B	C	D	TOTAL
1	0	357	2.201	571	3.129
2	1	740	4.748	1.257	6.746
3	1	261	818	86	1.166
4	0	58	101	5	164
Report Total	**2**	**1.416**	**7.868**	**1.919**	**11.205**

Conclusion

Traditional lead scoring methods no longer suffice in today's data-rich environment. Two-Dimensional Lead Scoring, which combines behavioural and demographic data, provides a more accurate and insightful approach to evaluating lead quality. By implementing this method, businesses can enhance their lead nurturing efforts, optimize resource allocation, and ultimately improve conversion rates.

There are for sure different ways how to score the leads and it is always a science by itself. My personal recommendation would always be start simple before you get more complex.

If you need help or want to jump on a call please reach out to me through the different channels:


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References

[1] Smith, J. (2022). The Future of Lead Scoring: A Comprehensive Guide. Marketing Today.

[2] Johnson, A. (2021). A New Era of Lead Scoring: Combining Behavioural and Demographic Data. SalesTech Magazine.

[3] Brown, M. (2020). How to Implement Two-Dimensional Lead Scoring for Your Business. CRM Insights.

[4] Thalox (2022) Knowledge Base. https://thalox.com/knowledge-base/.

The Author



Erwin Arnold
CEO of Thalox

With over 19 years of experience in the marketing and consulting industry, I am passionate about helping businesses communicate effectively and efficiently with their customers. As the CEO of Thalox AG, I lead a team of talented professionals who develop and deliver innovative AI solutions that analyze customer interests and expectations, and enable personalized and relevant dialogue across digital channels.

Before founding Thalox AG in 2020, I was the COO and founder of ec4u marketing experts, a Germany-based consulting firm that specialized in demand generation and marketing automation. I was responsible for the strategic direction, business development, and operational excellence of the company, which grew from a start-up to a market leader with offices in four countries. I also have extensive experience in working with C-level executives, as I was an assistant to the CEO at Newlogix and Pixelpark, two digital advertising agencies.

If you need help or want to jump on a call please reach out to me through the different channels:

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