



CRM Lead Scoring Optimization Checklist 2026

Data Foundation & Input Audit

Reviewing the quality, consistency, and availability of raw data points required for scoring models.

Source Data Inventory

Write something...

Data Integrity Checkpoints

- ☐ Duplicate Record Check
- ☐ Email Format Validation
- ☐ Missing Required Field Audit
- ☐ Standardization of Industry/Country Fields

Last Data Audit Completion Date

Enter date...

Percentage of Error-Free Records

Enter a number...

Data Audit Report

 Upload File

Identified Data Discrepancies

Write something...

Lead Attribute Definition

Identifying and categorizing demographic, firmographic, and behavioral attributes to be used as scoring variables.

Firmographic Attributes

Write something...

Demographic Data Points

- ☐ Job Title
- ☐ Geographic Region
- ☐ Seniority Level
- ☐ Department

Lead Source Categorization

- ☐ Inbound Organic
- ☐ Paid Advertising
- ☐ Outbound Prospecting
- ☐ Referral/Partner

Minimum Data Completeness Threshold

Enter a number...

Attribute Weighting Logic Notes

Write something...

Scoring Logic & Weighting Configuration

Establishing the numerical values assigned to specific actions, -traits, and engagement levels.

Lead Scoring Methodology Name

Write something...

Scoring Logic Documentation

Write something...

Maximum Possible Score Per Lead

Enter a number...

Scoring Model Type

- ☐ Explicit (Demographic/Firmographic)
- ☐ Implicit (Behavioral/Engagement)
- ☐ Hybrid (Combined)

Weighted Variables Included

- ☐ Email Engagement
- ☐ Website Visits
- ☐ Job Title Authority
- ☐ Industry Relevance
- ☐ Budget Capability

Scoring Weightage Calculation Spreadsheet

 [Upload File](#)

Behavioral Trigger Setup

Defining high-intent triggers such as email opens, webinar attendance, and whitepaper downloads.

Identified High-Intent Actions

- ☐ Email Open/Click
- ☐ Form Submission
- ☐ Webinar Attendance
- ☐ Pricing Page Visit
- ☐ Demo Request
- ☐ Content Download

Point Value per Trigger

Enter a number...

Trigger Source Identification

Write something...

Automation Channel

- ☐ Email Marketing Tool
- ☐ Website Tracking Pixel
- ☐ Social Media Integration
- ☐ Direct CRM Interaction

Implementation Deadline

Enter date...

Lead Decay & Negative Scoring Rules

Implementing rules to reduce scores for inactivity or disqualifying actions to prevent lead stagnation.

Inactivity Threshold Period

Write something...

Points Deduction per Inactivity Cycle

Enter a number...

Negative Trigger Criteria

- ☐ Unsubscribed from Email
- ☐ Bounced Email Address
- ☐ No Website Visits (30+ Days)
- ☐ Incompatible Job Title
- ☐ Competitor Domain Detected

Disqualification Logic Documentation

Write something...

Last Scoring Model Review Date

Enter date...

Sales & Marketing Alignment (SLA)

Defining the threshold at which a lead is officially passed from Marketing to Sales (MQL to SQL transition).

MQL Threshold Definition

Write something...

Lead Handoff Workflow

- ☐ Automated Assignment
- ☐ Round Robin
- ☐ Territory Based
- ☐ Manual Review

Required Handover Data Points

- ☐ Contact Phone Number
- ☐ Company Size
- ☐ Industry Type
- ☐ Budget Estimate
- ☐ Pain Point Description

SLA Review Frequency

Enter date...

Stakeholder Approval

Automation & Workflow Verification

Testing the automated updates and real-time recalculations of scores within the CRM engine.

Verified Automated Triggers

- ☐ Email Engagement Triggers
- ☐ Form Submission Triggers
- ☐ Website Visit Triggers
- ☐ Content Download Triggers

Workflow Sync Status

- ☐ Fully Functional
- ☐ Pending Testing
- ☐ Requires Debugging

Automation Error Log Reference

Write something...

Last Workflow Test Date

Enter date...

Testing Notes & Discrepancies

Write something...

QA Specialist Approval

Performance Monitoring & Feedback Loops

Setting up periodic reviews of conversion rates to refine and recalibrate the scoring model based on actual outcomes.

Last Score Audit Date

Scoring Model Accuracy Rating

- ☐ Excellent
- ☐ Good
- ☐ Needs Improvement
- ☐ Critical Failure

Lead-to-SQL Conversion Rate (%)

Identified Scoring Discrepancies

- ☐ Over-scoring inactive leads
- ☐ Under-scoring high-intent leads
- ☐ Data sync latency
- ☐ Inaccurate attribute weighting

Recommended Adjustments for Next Review Cycle

Write something...

Marketing/Sales Lead Approval

< Previous

> Next

✓ Finish

🔗 Generate Sample Report