How to use lead scoring in Mailvio?

Welcome to this tutorial on using the lead scoring feature in Mailvio automations. Lead scoring allows you to assign scores to contacts based on their actions within the automation, enabling you to target engaged subscribers with specific content. Follow these steps to implement lead scoring in your email automations.

Step 1: Access the Automations feature

- Log in to your Mailvio account.
- Navigate to the Automations section, as lead scoring can only be used within automations.
- If you already have an existing automation, proceed to Step 2. Otherwise, create a new automation or use a pre-built template.

Step 2: Set up the automation

- Create a trigger for your automation, such as when someone joins a specific group and is marked as active.
- Configure any necessary steps, such as sending an email, adding a delay, or using conditional logic.

Step 3: Add the lead scoring step

- Locate the point in your automation where you want to assign a score to contacts.
- Add a scoring step by clicking on the "Score" option.
- Choose a trigger for scoring, such as when a specific email is opened or when a link is clicked.
- Define the score to be assigned to contacts who meet the scoring trigger (e.g., 50 points for opening an email).

Step 4: Continue scoring and branching

- Add additional scoring steps if needed, based on other actions or conditions.
- Assign scores to contacts accordingly (e.g., 50 points for clicking a link).
- Utilize conditional logic to branch the automation based on the scores received.

Step 5: Define a scoring goal

- Add a goal step to your automation by clicking on the "Goal" option.
- Choose the goal type as "When Automation Score is Reached."
- Set a specific score threshold (e.g., 100 points) for the goal to be triggered.
- Configure the desired action to take when the goal is reached, such as moving contacts to another automation.

Step 6: Customize the automation flow

- Review and adjust the automation flow based on the scoring and goal steps added.
- Add additional steps, emails, delays, or conditions as necessary.
- Ensure the automation continues for contacts who have not reached the goal score.

Step 7: Save and test the automation

- Name your automation for easy reference.
- Save the automation configuration.
- Test the automation to ensure the lead scoring and goal steps function as intended.

Congratulations!

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URL: https://support.mailvio.com/content/4/14/en/how-to-use-lead-scoring-in-mailvio.html

You have successfully implemented lead scoring in your Mailvio automation. Contacts will now receive scores based on their actions, allowing you to segment and target engaged subscribers effectively.

If you have any further questions or need assistance, please contact our support team at support@mailvio.com. We are here to help you.

Thank you for choosing Mailvio, and happy automating!

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