

— THE RFE ACCOUNT SCORING PLAYBOOK · FOR ABM

Know which accounts are ready to buy. Before someone else does.

A transparent, 100-point account & lead scoring model built for ABM teams. RFE lifts BDR connection rates on cold lists from **5%** to **12%**, a **140% jump** that turns a noisy pipeline into booked meetings and demos.

+140%

BDR CONNECTION RATE

5% → 12% on cold ABM lists

— START HERE

A scoring model your reps will actually trust.

RFE is a chassis, not a fixed formula. Everything in this playbook is meant to be retuned against your own conversion data, and it's all yours to keep.

What this is

A complete, editable account & lead scoring model, plus the exact steps to deploy it. A chassis you retune, not a black box.

Who it's for

RevOps, marketing ops, and demand-gen leaders in B2B SaaS who want a score their sales team will act on.

You own it

The model, the fields, the flows, all yours to keep and modify. No black boxes, no lock-in.

— WHAT'S INSIDE

- 01 Why RFE, and not RFM
- 02 The results: a 140% lift in connection rate
- 03 The four dimensions at a glance
- 04 Channel & Activity scoring tables
- 05 Recency, Frequency & the caps
- 06 Score to segment: routing & SLAs
- 07 Weight variations & worked examples
- 08 Tuning the model for your org
- 09 Deploying it: HubSpot & Salesforce
- 10 Governance: keeping the score honest

Why RFE, and not RFM

RFM, short for Recency, Frequency and Monetary, is a good model. It was also built for retail and ecommerce, where *Monetary* is real because the customer has already bought and you have the purchase history.

Run that same model against a net-new B2B SaaS account in an ABM motion and Monetary has nothing underneath it. Teams bolt on a firmographic proxy that pretends company revenue equals buying intent, or they quietly ignore M and never rebalance the weight it left behind. Either way, **a third of the model is dead.**

RFM · RETAIL DNA

Recency

Frequency

Monetary

no purchase history, dead weight

RFE · BUILT FOR ABM

Engagement = 70% of the score

Channel

35

Activity

35

Recency

20

Freq

10

RFE makes two moves: **drop Monetary**, then **split Engagement** into *Channel* (where the account came from) and *Activity* (what it actually did). Those two dimensions carry the part most models under-weight.

■ Hard cap at 100, floor at 0

No overflow, no negatives, ever. A score has one job: map predictably to a segment and an action. Stacked bonuses can never push it past the ceiling.

■ Decay lives inside Recency

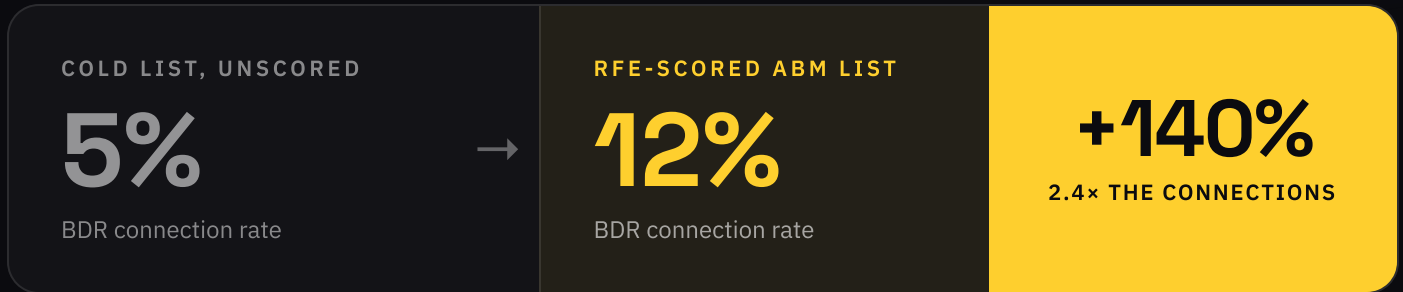
The entire aging curve sits within Recency's range of 0 to 20. Every dimension is self-contained, so nothing bleeds into anything else and the total can never go negative.

02

WHY THIS PAYS OFF

The result: a 140% lift in connection rate

When BDRs work a scored, high-fit list instead of dialing cold, they reach far more of the accounts they touch. Connection rate is the top of the funnel. Lift it, and meetings and demos compound underneath.



It compounds down the funnel

per 1000 target accounts

Connections



Meetings booked



Demos run



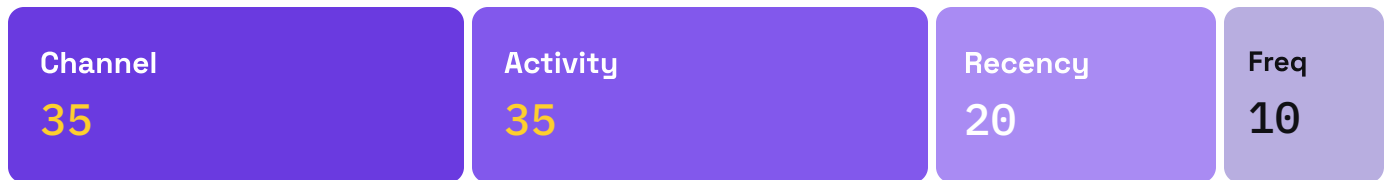
Illustrative model. Downstream conversion rates (connect→meeting, meeting→demo) are held constant to isolate the connection-rate effect, so the 140% lift carries all the way to **31 demos vs 13**, 18 more per 1000 accounts. Retune the rates to your own funnel in the tweaks panel.

03

THE MODEL IN FULL

Four dimensions, one hard-capped 100

The model scores four dimensions into a hard-capped 100-point total. The formula is deliberately boring: add the four capped dimensions, and the ceiling holds.



Engagement carries 70 points

Total capped at 100 · floored at 0

DIMENSION	MAX	WHAT IT MEASURES
Eng: Channel	35	Intent strength of the acquisition source. Paid search, demos and ABM interviews score highest.
Eng: Activity	35	Conversion intent of the action taken. Demo request beats webinar beats download beats browsing.
Recency	20	How fresh the last meaningful touch is. A smooth decay curve from 20 down to 0, with no negatives.
Frequency	10	How many touches, across how many distinct channels. A confidence multiplier, not a headline.

THE FORMULA

Total = Channel + Activity + Recency + Frequency, capped at 100

04

ENGAGEMENT · 35 POINTS

Channel: where the account came from

Scored by the intent signal of the acquisition source. Base score plus an optional bonus, both operating inside the 35-point cap.

HIGH INTENT

base 25–35

Paid Google Ads Highest commercial intent, keyword-driven	35 +5
Paid Bing Ads Same search intent, smaller volume	35 +5
1:1 Interview (ABM program) Direct dialogue, strongest channel signal	35
G2 / Capterra ads + intent Review-site intent, needs CRM sync	33
Chatbot (product inquiry) Self-initiated product conversation	32
Paid LinkedIn Ads Strong B2B targeting, lower than search	32 +5
BOFU webinar (masterclass/demo) Bottom-funnel, product-focused	31
In-person events / mixers (own) Face-to-face at your own event	30
Leadfeeder / Factors (pricing) Behavioral intent, identified traffic	30
Virtual roundtables Curated peer audience	29
BDR / AISDR outreach (replied) Validated response to outbound	28
Partner referral Warm intro from partner ecosystem	28
Paid content syndication Gated 3rd-party content, varies	25

MEDIUM INTENT

base 10–20

TOFU / MOFU webinars Educational, research phase	17
Assets (lead magnet / hero) Gated download, moderate commit	16
Survey template download Product-adjacent interest	16
On-demand webinar / eWebinar Async, lower urgency	15
Calculators / quizzes / trivia Interactive engagement	15
Other referral (affiliate) Affiliate-driven, quality varies	15
Website blog pages (specific) Content consumption, early	14
Exhibitions / conferences (3rd party) Lower than owned events	14
Leadfeeder / Factors (resources) Browsing resources, not pricing	13
Email marketing (clicked/replied) Low effort but intentional	12
Twitter / X ads Lower B2B intent, awareness	12
Programmatic / Meta / Taboola Broad targeting, low intent	11

LOW INTENT

base 0–5

Website non-intent pages General browsing, no signal	3
Leadfeeder / Factors (non-intent) Anonymous, non-intent pages	3
Social (organic engagement) Passive likes, no buying signal	2
YouTube (views) Brand awareness only	2
LinkedIn Dripify (no reply) Delivered, no engagement	1

Cap rule Base + bonus can never exceed 35. The bonus only matters when base sits below the ceiling, so LinkedIn Ads (32) + 5 lands at 35.

04

ENGAGEMENT · 35 POINTS

Activity: what the account actually did

Scored by the conversion intent of the action taken. **This is the single strongest predictor in the model.**

ACTIVITY / CONVERSION TYPE	BASE	BON
HIGH INTENT		base 27-35
Demo form fill <small>Strongest buying signal</small>	35	+5
Meeting booked (email/LI/call) <small>Treat as equal to demo fill</small>	35	+5
Chatbot inquiry (upgrade/biz) <small>Self-initiated upgrade convo</small>	33	+5
1:1 interview / ABM dialogue <small>Completed personalized touch</small>	33	
Pricing page visit (identified) <small>Evaluating cost, near decision</small>	30	
Virtual roundtable attendance <small>Attended peer discussion</small>	29	
In-person event / mixer attend <small>Physical presence</small>	28	
BOFU webinar attendance (live) <small>Product-focused, live</small>	27	
MEDIUM INTENT		base 10-20
Calculator form fill <small>High for the medium tier</small>	18	
Asset / lead magnet download <small>Gated content exchange</small>	16	
Survey template downloaded <small>Product-adjacent tool usage</small>	16	
High-intent page engagement <small>>45s, 75% scroll, CTA click</small>	15	
On-demand webinar viewed <small>Async content consumption</small>	15	
Event / webinar reg (no show) <small>Intent without follow-through</small>	14	
Blog page visit (intent) <small>Reading product-adjacent content</small>	13	
Resource assets viewed <small>Browsing solution resources</small>	13	
LOW INTENT		base 0-5
Email open / click <small>Needs frequency to matter</small>	4	
Page visit (non-blog/product) <small>General browsing, no signal</small>	3	
Paid ad click (no action) <small>Bounce-equivalent</small>	2	

Cap rule The same 35-point ceiling applies. A demo fill + bonus is still 35; the bonus only lifts sub-ceiling actions up to the cap.

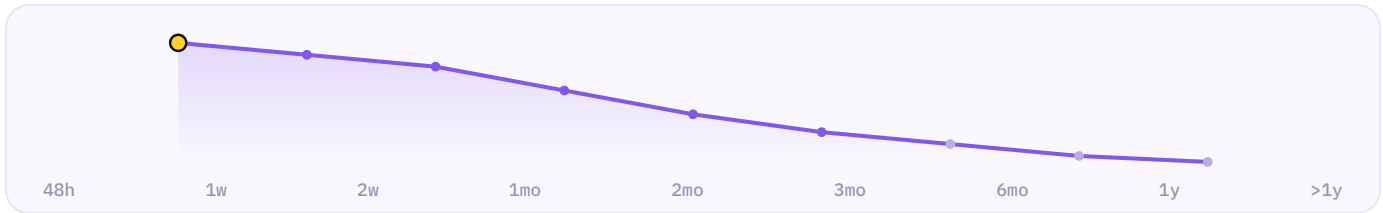
05

THE OTHER TWO DIMENSIONS

Recency & Frequency

Recency · 20 pts

The full decay curve lives inside this one dimension, on a scale of 0 to 20 that never goes negative.



HOT · active opportunity window		
Within 48 hours	20	Maximum urgency. Route immediately to owner.
Within 1 week	18	Active evaluation. Follow up within 24 hours.
Within 2 weeks	16	Active window closing. Priority follow-up.
WARM · re-engage before it cools		
1 month ago	12	Cooling. Trigger automated nurture.
2 months ago	8	Personalized re-engagement, BDR touch.
3 months ago	5	At risk. Last-chance re-activation.
COLD · park in long-term nurture		
6 months ago	3	Park in quarterly nurture. Do not pursue.
1 year ago	1	Dormant. Re-qualify completely.
More than 1 year	0	Dead. Remove from active scoring, archive.

Frequency · 10 pts

A confidence multiplier. The top tier needs channel diversity, not raw count.

TIER	CRITERIA	PTS	SIGNAL
Very high	10+ engagements across 3+ distinct channels	10	Top priority
High	More than 5 engagements across 2+ channels	8	Strong repeat interest
Medium	2 to 5 engagements across any channels	5	Emerging interest
Low	1 engagement only (single touch)	2	Could be noise
None	0 recorded engagements	0	List import only

06

SCORE TO SEGMENT

Routing & SLAs

The score is not the deliverable. **The routing decision is.**

Every account lands in one of five segments, each with an owner and a service level. A hot account routed slowly is a lost account.

MIN(base + bonus, cap)

Dimension caps are absolute. Nothing exceeds its ceiling.

$0 \leq \text{total} \leq 100$

Every dimension is non-negative, so the total falls out cleanly.

bonus → only below cap

Rewards high intent without letting one signal run away.

SCORE	SEGMENT	RECOMMENDED ACTION	OWNER / SLA
76-100	Hot	Immediate call + multi-channel sequence. Priority routing.	AE-owned, under 4-hr SLA
56-75	Warm++	Direct BDR outreach: calls, LinkedIn, personalized email.	BDR-owned, 24-hr SLA
36-55	Warm	Personalized 1:few ABM, MOFU content, event invites.	Marketing to BDR at 50+
16-35	Lukewarm	Drip campaigns, retargeting, TOFU syndication.	Marketing, bi-weekly nurture
0-15	Cold	Exclude from active outreach. Park in automation.	Marketing, quarterly review

07

SAME CHASSIS, DIFFERENT DIALS

Weight variations & worked examples

Weights by account segment

Enterprise leans on channel quality; SMB & self-serve lean on frequency.

DIMENSION	ENTERPRISE	3P / SMB	BASIC / FREE
Engagement: Channel	35	30	25
Engagement: Activity	35	35	35
Recency	20	20	20
Frequency	10	15	20
Total	100	100	100

Activity intent is the strongest predictor everywhere, so it holds at 35 across the board. Recency urgency is consistent, so it stays at 20. Channel and Frequency trade the remaining weight.

Five accounts, scored end to end

SCENARIO	CH	ACT	REC	FREQ	TOTAL	SEGMENT / ACTION
Google Ad → demo fill, 2 days ago, 8 touches	35	35	20	8	98	Hot AE call, under 4-hr SLA
LinkedIn Ad → webinar, 1 week ago, 4 touches	32	27	18	5	82	Warm++ BDR within 24 hrs
Blog → asset download, 1 month ago, 3 touches	14	16	12	5	47	Warm MOFU nurture, webinar invite
Email click only, 2 months ago, 1 touch	12	4	8	2	26	Lukewarm Drip, retargeting
Social follow, over 1 year ago, 1 touch	2	3	0	2	7	Cold Archive

Tune the model for your org

The numbers in this playbook are a strong starting point, not gospel. Spend an afternoon retuning them against your own data before you deploy. **That step saves weeks of rework.**

01

Validate against closed-won

Score your last six months of closed-won accounts retroactively. If your best customers land in the bottom third, the model is wrong before you've built it. Adjust weights until known winners cluster in Warm++ and Hot.

02

Re-rank what you actually run

Your channel mix isn't this list. Delete the sources you don't use, add the ones you do, and re-rank by the conversion rate each produces. If your webinars beat paid search, the model should say so.

03

Weight by evidence, not intuition

For each attribute, check the lift. If leads from a source convert at 3× your baseline, weight it roughly 3× your base increment. Don't assign arbitrary points and hope.

04

Keep it lean

Resist scoring everything. Every extra rule dilutes the signal and makes recalibration harder. A tight model with documented rules and sales buy-in beats a sprawling one nobody trusts.

Deploying it

Section 2 is your spec, so design offline first. The layered structure of both platforms maps almost one-to-one onto RFE's capped dimensions. Here are the essential moves; the full step-by-step lives in the deployment appendix.

● HubSpot

Current Lead Scoring tool · Marketing Hub Pro / Ent

- 01 Create a **Company combined score**; set the total limit to -100 to 100 (never assign negatives).
- 02 One **group per dimension**, capped 35 / 35 / 20 / 10. Group limits enforce your caps automatically.
- 03 **Channel**: property rules on Original / Latest Source (+ synced G2, Leadfeeder, Factors intent).
- 04 **Activity**: event rules for demo fills, meetings, pricing visits, webinar attendance, downloads.
- 05 **Recency**: "In the last" time-frame rules per tier, so HubSpot decays it for you. No nightly job.
- 06 **Thresholds & routing**: five bands, then a workflow that tasks the AE / BDR and posts to Slack.

● Salesforce

Record-triggered Flow · transparent, not Einstein

- 01 Add ledger fields:
RFE_Channel/Activity/Recency/Frequency__c + last-engagement + distinct-channel count.
- 02 **Cap each dimension** with $\text{MIN}(\text{base} + \text{bonus}, 35)$.
- 03 **Total & Segment** as formula fields. The total auto-bounds 0 to 100; segment via nested IF / CASE.
- 04 **Channel & Activity** via an after-save Flow on Account (Decision + Assignment elements).
- 05 **Recency** via a nightly schedule-triggered Flow that computes $\text{TODAY}()$ minus last engagement.
- 06 **Route** on the total via a second Flow that creates AE / BDR tasks and posts to Slack.

THE ONE THING THAT BREAKS IT

Dirty data. A score built on empty title, industry, and source fields is fiction. **Enrich first, score second.**

Governance

A scoring model is a living system, not a set-and-forget project. Four habits keep it trustworthy.

01 Age the score every night

HubSpot decays Recency with time-frame rules; Salesforce with a nightly Flow. Either way, a hot account must cool on its own so your Hot band never fills with stale records.

02 Recalibrate quarterly

Re-score recent closed-won and closed-lost accounts. If high scorers aren't converting at a materially higher rate than low scorers, the model has drifted. Any major ICP, market, or process change triggers an immediate review.

03 Protect the sales relationship

Route a rep a Hot account that's obviously junk and they stop trusting the number after one or two bad calls. Treat it as a bug, trace it to the rule that caused it, and fix the rule. Trust is expensive to rebuild.

04 Keep it documented and owned

Every rule should have a reason a human can explain. If nobody can say why a source is worth 30 points, it shouldn't be worth 30 points. Documented logic survives a team change.

BUILT BY OMNITICS

This model, and everything you build from it, is yours to own.

Senior operators, transparent frameworks, and assets you keep. If you want help deploying RFE against your own conversion data, or retuning it as your motion changes, that's exactly the kind of work we do.

+140%

CONNECTION RATE

From 5% to 12% on cold ABM lists, with a fuller calendar of meetings and demos.