

Lead Scoring for Economic Developers 2026

Author: Tom Wengler, Founder of Convergence, LLC

100 Economic Development Teams using HubSpot's marketing and CRM software that contains our Economic Development Accelerator / IP.

A lead scoring model starts with defining “fit + engagement” criteria with your recruitment team or VP, then translating those into clear score rules, thresholds, and workflows you can iterate over time.

1. Define purpose and stakeholders

- Clarify what scoring should drive: faster sales follow-up, MQL/SQL handoffs, SDR queues, or prioritizing outreach in your case.
- Align marketing, sales, and leadership on who owns the model, how often it will be reviewed, and how success will be measured (e.g., conversion rate of high-score leads).

2. Map ICP “fit” and key behaviors

- Document your ideal contacts/companies: industry, size, location, role, and any disqualifiers; this becomes your positive/negative “fit” criteria.
- List the behaviors that genuinely signal intent in your funnel (high-value page views, form types, meetings booked, email engagement, event attendance) so you are scoring meaningful engagement, not vanity clicks.

3. Design the scoring framework

- Decide whether you need one unified score or separate fit vs engagement scores.
- Sketch approximate point values and thresholds (e.g., 0–30 low, 31–70 warm, 71+ hot) based on how strongly each attribute correlates with opportunities or projects in your current data.

4. Configure scores in HubSpot

- In HubSpot, create or edit score properties under the Lead Scoring/Properties settings for Contacts, Companies, or Deals as needed.

Contact-based



Contact engagement score

Measure your contact's level of engagement based on their behavior and interactions.



Contact fit score

Evaluate how closely a contact aligns with your ideal customer based on demographics and other criteria.

- Add positive and negative criteria to those score properties (demographics, firmographics, and interactions) and, if available, set inclusion lists and association rules so only relevant records are scored.
- Consider building your score with HubSpot's AI

1. Build your score with AI

Get unique scoring recommendations tailored specifically to your business. These recommendations are based on the analysis of your historical data.

You're in control. You can edit, delete and add to these recommendations before turning on your score.

[Learn more](#) 



5. Build thresholds, lists, and workflows

- Implement lists or views for each score band (e.g., “High-priority leads” or “Sales-ready projects”) and define what happens at each threshold (owner assignment, task creation, sequences, or nurture).

Examples:

Recruitment subscribers list (score is 0-30, lifecycle is subscriber/lead)

Recruitment warm leads list (score is 30-70, lifecycle stage is lead when score hits 30 – workflow needed)

Recruitment hot leads lists (score is 70+, now make them SQL and Opportunity when a recruitment project is created).

Expansion – BRE subscribers list (score is 0-30, lifecycle is subscriber/lead)

Expansion – BRE warm leads list (score is 30-70, lifecycle stage is lead when score hits 30 – workflow needed)

Expansion – BRE hot leads lists (score is 70+, now make them SQL and Opportunity when an expansion or retention project is created).

- Use workflows that trigger on score changes to automate alerts, pipeline stage changes, and handoffs, and add decay or resets so outdated activity does not keep scores inflated.

6. Test, validate, and iterate

- Run the model in parallel for a period, compare scores against actual conversions or project wins, and adjust points or criteria where misalignment appears.
- Establish a recurring review cadence (for example, quarterly) to refine scoring rules as campaigns, sectors, or target profiles evolve, and consider layering predictive scoring once you have enough historical volume.

Here's a menu of positive and negative actions you can use in a comprehensive HubSpot scoring model; you can pick and weight from these for fit, engagement, and recency.

Profile & fit criteria (contact/company data)

Positive:

- Target industry (e.g., manufacturing, logistics, agribusiness, etc.).
- Target geography (within service area, priority regions, or target metros).
- Senior roles based on job title
- Company size in target band (employees or revenue within your sweet spot).
- Target organization type

Negative:

- Disqualified industries or NAICS groups (e.g., retail if not a focus, very small lifestyle businesses, etc.).
- Out-of-region locations or countries you cannot serve.
- Student/Intern/Consultant/Job-Seeker titles when they are not buyers.
- Free or invalid email domains (g-mail, yahoo) where you need business contacts.

Website & content engagement

Positive:

- Visits to high-intent pages: “Contact us,” “Sites & Buildings,” incentives, workforce, data center/industrial landing pages, “why our region” pages.
- Multiple visits or high session depth over a short period (e.g., 5+ page views in 7 days, or repeat visits within 30 days).
- Downloads of gated assets: RFI templates, data sheets, case studies, sector reports, site selector guides.
- Clicks on key CTAs: schedule a call, request information, download proposal, book site tour.

Negative:

- Long-term inactivity on site after prior engagement (no visits in 60–90 days).
- Frequent visits only to careers/jobs pages (job seekers, not prospects).

Forms, meetings, and events

Positive:

- High-intent forms: project inquiry, RFI/RFP submission, “request confidential conversation,” “schedule site visit,” “request incentive discussion.”
- Medium-intent forms: newsletter sign-ups, event/webinar registrations, download of detailed reports or toolkits.
- Meeting booked with staff via HubSpot meetings (intro call, project, BRE visit, investor meeting).
- Attendance at webinars, briefings, or in-person events; repeat attendance or engagement in Q&A.

Negative:

- No-shows for booked meetings (marked in CRM).

- Event registrations with never-attended behavior over time.

Email and campaign engagement

Positive:

- Repeated email opens and clicks on business-recruitment or BRE campaigns.
- Clicks on high-value links (property listings, incentive info, site tour scheduling).
- Replies to outbound or nurture emails, especially if they reference projects, timelines, or next steps.

Negative:

- Unsubscribes from key nurture lists or project communications.
- Marking emails as spam or hard bounces.
- Low engagement over time: large volume of sends with no opens/clicks for 90+ days.

Sales/BRE/project activity

Positive:

- Creation of a new project/deal associated with the contact or company (expansion, attraction, redevelopment, etc.).
- Movement to later project stages (shortlisted sites, site visit scheduled, incentive under review, LOI/negotiation).
- Logged BRE visits, site tours, and follow-up meetings in HubSpot tasks/activities.

Negative:

- Project marked as lost or on hold for >6–12 months.
- Explicit disqualification reason (no longer expanding, moved out of region, not a fit).

Decay and recency rules

You can add:

- Time-based decay (subtract points when no tracked activity in 30/60/90 days) so scores reflect recent intent.
- Strong boosts for “fresh” high-intent actions in the last 7–14 days (recent RFI, new project, new site tour request).

SAMPLE SCOREING MIX

Overall scoring framework

- Use separate scores: Fit Score (0–60), Engagement Score (0–60), plus a Combined Score.
 - Define “Delegation-Visit Ready” as Combined Score ≥ 80 and at least one recent (≤ 30 days) high-intent action like a soft-landing inquiry, delegation assistance request, or RFI form.
-

Fit score (who they are) – up to ~60 pts

Positive fit (add):

- Country: priority FDI countries/ or USA markets on your outreach list (e.g., markets where you run campaigns, marketing trips) +15.
- Role/title: C-suite, Founder, VP, Head of Expansion, Head of North America, Corporate Real Estate, Site Selector +15.
- Organization type:
 - Company (startup, scale-up, or corporate) planning U.S. entry or expansion +20.
 - Investor, VC, PE, sovereign wealth, family office +15.
- Target industry matches key industries (advanced manufacturing, semiconductors, creative & digital media, clean tech, financial services, life sciences, data management, space, HQ/regional offices) +10.
- Company size in target band (e.g., 20–5,000 employees or similar) +5–10 (tiered).
- Signals of growth or investment capacity (funded startup, PE-backed, recent growth news, or large current workforce in major metro) +10

Negative fit (subtract):

- Role clearly non-decision-maker / job-seeker (student, “looking for a job,” etc.) –15.
 - Company type: service provider selling into your ecosystem (consultant, recruiter) rather than investing/locating –10.
 - Industry outside focus and low impact (e.g., local micro-retail, home based business, dirty manufacturing, etc.) –10.
 - Micro business / sole proprietor when your incentive or program thresholds require scale –10.
-

Engagement score (what they do) – up to ~60 pts

High-intent web & form actions

- Submits a “request information” or “contact us” form +25.
- Views “recruitment audience” content multiple times +15
- Views “Key Industries” plus a specific industry page (e.g., advanced manufacturing, HQ, life sciences, data, creative) in same or recent sessions +15
- Downloads or views Taxes & Incentives, financing, or business incentives material +15.
- Downloads major employers/cluster maps or workforce/talent assets +10.
- Deep session (e.g., ≥6 page views) across economic development, incentives, workforce, and major employers pages in ≤14 days +10.

Meetings, calls, and events

1. Books a meeting to discuss expansion/FDI discussion +25.
2. Submits a contact/inquiry form explicitly about relocation, expansion, or starting a business in the region +25
3. Asks about sites/buildings, incentives, or workforce in form comments or follow-up +20
4. Schedules or confirms a site visit or exploratory trip (even if early-stage)
5. Sends project details (jobs, investment, timeline, facility type) via email or form +25

Email and campaign engagement

- Clicks on a campaign related to expansion/relocation, key industries, incentives, or workforce at least once) +10.
- Repeated engagement: opens/clicks in 3+ business attraction-themed emails within 60 days +10.

Negative/decay actions

Behavioral negatives:

- No website visits or email engagement for 90 days after a prior score ≥40 –15.
- Registers interest (form/meeting) but repeatedly no-shows or never responds to scheduling attempts –20.
- Inactive (no site visits, email engagement, meetings) for 90 days after reaching score ≥40 –15
- Repeated no-shows for scheduled expansion calls or site visits –20

- States “not expanding / no interest in <your community>” or “decision made for another region” –30

Project status / internal flags:

- Project tagged as “lost to competitor region” or “cancelled” –25.
- Internal classification as “not a fit” for incentives/program (e.g., outside thresholds, misaligned use) –20

Example thresholds and usage

Use these starting thresholds:

- 0–30: Low priority – stay in light nurturing.
- 31-69: Engaged Project interest – assign to nurture; monitor.
- 70–89: High-value prospect – notify staff, propose an exploratory call, start structuring a potential visit.
- 90+: Site-Visit Priority – trigger workflow to:
 - Create Project Record in HubSpot.

How to operationalize in HubSpot

- Create two properties: “Fit Score – Attraction” and “Engagement Score – Attraction,” plus a calculated or combined “Attraction Score.”
- Build views/lists for each threshold and workflows that:
 - Notify the right recruiter when score crosses 70.
 - Auto-create or advance a Project/Deal for 90+ scores and attach incentives/workforce checklists.
 - Adjust lifecycle stage (e.g., Lead → MQL → SQL/Project) as Attraction Score climbs.

ABOUT US

Convergence, LLC specializes in working with Economic Development Organizations.

www.Convergence-CRM.com

Chattanooga, TN

423.309.7483

Tom Wengler

Founder and Managing Partner

To determine your software requirements, we've published this [online tool](#) which is an easy "get started exercise".

Tell us what you'd like HubSpot to do for you.

Click to Watch a [Short Video](#) - How this One Form Helps You Find the Right System.

Use our HubSpot checklist below to see how HubSpot can help you and your team.

Our organization covers the following aspects of economic development:

- ☐ Economic Development
- ☐ Chamber of Commerce
- ☐ Workforce Development
- ☐ Talent Attraction
- ☐ Student Recruitment
- ☐ Tourism
- ☐ Business Incubator
- ☐ Business Accelerator
- ☐ Community Development

Core Functionality Needed

- ☐ Contacts Database
- ☐ Companies Database
- ☐ Economic Development Project Management