



## Relationship Report Scoring Quick Reference Guide

Intapp Relationships has 4-categories that a Relationship is based upon:

- **Inbound Email Weight** – An email from contact to principal, a potential contact.
- **Outbound Email Weight** – An email a principal creates and sends to a contact.
- **Reply Email Weight** – A reply chain conversation between principal and contact.
- **Email Date Weight.** – The length of time since last communication (degradation).

Each category has a default Intapp weight and range. These ranges and weights are set based on importance. The weights and ranges are fully customizable to match your organizational need. In Relationships' default configuration, no weight is given to Inbound Emails and Outbound and Reply are weighted most heavily. The Email Date Weight reduces the relationship score as time passes.

Categories				Stars Score																																																							
<b>Relationships Scoring</b> <table border="1"> <thead> <tr> <th>Categories</th> <th>Weights</th> <th>Weights</th> <th>Ranges</th> </tr> </thead> <tbody> <tr> <td>Inbound Email Weight</td> <td>0</td> <td>▼</td> <td>Ranges</td> </tr> <tr> <td>Outbound Email Weight</td> <td>2</td> <td>▼</td> <td>Ranges</td> </tr> <tr> <td>Reply Email Weight</td> <td>3</td> <td>▼</td> <td>Ranges</td> </tr> <tr> <td>Email Date Weight</td> <td>5</td> <td>▼</td> <td>Ranges</td> </tr> </tbody> </table>				Categories	Weights	Weights	Ranges	Inbound Email Weight	0	▼	Ranges	Outbound Email Weight	2	▼	Ranges	Reply Email Weight	3	▼	Ranges	Email Date Weight	5	▼	Ranges	<table border="1"> <thead> <tr> <th>Stars</th> <th>Minimum (inclusive)</th> <th>Maximum (exclusive)</th> <th>Representation</th> </tr> <tr> <td></td> <td></td> <td></td> <td>● Asterisks ● Numeric</td> </tr> </thead> <tbody> <tr> <td>0</td> <td></td> <td>2</td> <td>●</td> </tr> <tr> <td>1</td> <td>2</td> <td>4</td> <td>●</td> </tr> <tr> <td>2</td> <td>4</td> <td>6</td> <td>●</td> </tr> <tr> <td>3</td> <td>6</td> <td>8</td> <td>●</td> </tr> <tr> <td>4</td> <td>8</td> <td>10</td> <td>●</td> </tr> <tr> <td>5</td> <td>10</td> <td></td> <td>●</td> </tr> </tbody> </table>				Stars	Minimum (inclusive)	Maximum (exclusive)	Representation				● Asterisks ● Numeric	0		2	●	1	2	4	●	2	4	6	●	3	6	8	●	4	8	10	●	5	10		●
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The Inbound, Outbound, and Reply category values are added together and the email date weight value is subtracted from that total. The result of that calculation is the category weighted value. The category weighted value is sent to the Stars section where the final Stars score is determined. This score is displayed within ERM Reports and is also sent to the CRM at its scheduled intervals if it is a new relationship or if the current value stored in CMC changed to a new value.

The Star score will be a value from **0 – 5**. The values attributed to each level are as follows:

- 0** – Almost no, or no emails are exchanged with this contact.
- 1** – Very few emails are exchanged with this contact; could be recently – contact may have emailed with few or no replies.
- 2** – Either a very small number of emails were sent recently, or a few more emails were sent in the past.
- 3** – Quite a few emails have passed between contact and principal.
- 4** – Many emails have been sent to and received by this contact; there is most likely recency.
- 5** – A real relationship exists here, with more than 10 emails being sent and replied to; most likely there is recency of contact.

While each relationship score is based on the same criteria, some generalizations can be made about relative strength of relationships. Scores between 3 and 5 indicate a real relationship. A high score means many emails were exchanged at some point in time, often recently. The difference between a 4 and 5 may be the date of last contact or more reply emails were exchanged. Relationships views differences between Star scores as fluid rather than rigid with the overall goal of revealing the existence and relative strength of the relationship between principal and contact as the relationship evolves over time.