

Chapter 5: The Life of a Lead

Table Reference

Every table from this chapter, with what it's for and how to actually use it.

Lead Status & Phase-Gate Criteria

Status	Entry Criteria	Exit Criteria / Next Step	Max Dwell Time
New	Record created via form fill, event, import, or manual entry	Scored and evaluated against MQL threshold – automated intake only, no human contact yet	24 hours
MQL	Score threshold met OR manual MQL flag set; lead source attributed	SDR reviews and accepts (-> SAL) or rejects with documented reason (-> Disqualified/Nurture)	4 business hours
SAL	SDR has explicitly accepted; BANT or ICP criteria confirmed	Sequence initiated, record moves to Working – this is the actual gate; nothing gets worked before this point	24 hours
Working	SDR has logged at least one contact attempt following SAL acceptance; record assigned	Meeting/discovery call held (-> SQL) or attempts exhausted (-> Nurture/Disqualified)	30 days
Nurture / Recycle	Sales exhausted attempts OR prospect confirmed not ready; recycle reason logged	Re-scores and re-enters MQL flow if engagement threshold met again	N/A
Disqualified	Disqualification reason required and logged; record suppressed	Terminal status – opt-out logic and suppression list updated	N/A
SQL	Sales has validated the opportunity through initial discovery and qualification activities, confirming a real potential buying need	Opportunity created once need, budget, and timeline are validated; no real need found -> Recycle	14 days

Description: The full lead lifecycle (New -> MQL -> SAL -> Working -> Nurture -> Disqualified -> SQL), with the entry/exit rules and maximum time allowed in each status.

How to use it: Use to configure your CRM's status field logic, or to audit whether leads are actually moving through statuses within their allowed dwell time.

Lead Routing & Assignment Rules

Routing Trigger	Assignment Rule	Owner Queue	Escalation Path
Inbound demo request (ICP account)	Direct to territory AE	AE Queue	SDR manager if no response in 1 hour
MQL from ABM target account	Direct to paired SDR	ABM SDR Team	Manager escalation at 4-hour breach
Event lead (attended)	Round-robin to regional SDR	Event SDR Pool	SDR manager at 24-hour breach
MQL from non-ICP account	Round-robin to inbound SDR team	Inbound SDR Pool	Manager at 4-hour breach
Re-MQL (recycled lead)	Return to original SDR if still active	Original Owner	Reassign if owner inactive
Competitor employee	Auto-disqualify – do not route	N/A	MarkOps review

Description: Maps specific routing triggers to assignment logic and what happens when a lead isn't worked in time.

How to use it: Use as a build spec for your routing/assignment tooling, or to check that every realistic trigger actually has a defined owner and escalation path.

First-Attempt SLA by Lead Type

Lead Type	First Attempt SLA	Total Attempts	Sequence Window
MQL (Score-Based)	4 business hours	6 attempts	14 days
Inbound / Demo Request	1 business hour	8 attempts	21 days
Event / Webinar Lead	24 hours post-event	5 attempts	10 days
Recycled / Re-MQL'd Lead	8 business hours	4 attempts	10 days

Description: The actual, agreed SLA commitments by lead type – how fast, and how many tries, before a lead is considered handled.

How to use it: Use this as the literal SLA your team is held to, and as the source of truth when Sales or Marketing disagree about what “fast enough” means.

The Cascade: Blank Template

Cascade Step	Product A	Product B	Product C	Blended / Total
Revenue Goal (Executive Target)				
Less: Renewal / Retained Revenue				
Less: Expansion Revenue				
= New Business Revenue Required				
multiplied by Pipeline Coverage Ratio				
= Required Pipeline				
divided by Average Deal Size				
= Opportunities Required				
divided by SQL-to-Opportunity Rate				
= SQLs Required				
divided by MQL-to-SQL Rate				
= MQLs Required				
divided by Lead-to-MQL Rate				
= Leads Needed				

Description: The full reverse-funnel cascade as a blank fill-in template, broken out by product line plus a blended total column.

How to use it: Populate with your own real numbers each planning cycle to calculate exactly how many leads you need to hit the revenue goal.

The Cascade: Worked Example

Input / Output	Value
Revenue Goal	\$25M
Less: Renewal / Expansion Revenue	\$15M

Input / Output	Value
= New Business Revenue Required	\$10M
Pipeline Coverage Ratio	4x
= Required Pipeline	\$40M
Average Deal Size	\$100K
= Opportunities Required	400
SQL-to-Opportunity Rate	50%
= SQLs Required	800
MQL-to-SQL Rate	40%
= MQLs Required	2,000
Lead-to-MQL Rate	10%
= Leads Needed	20,000

Description: The same cascade math worked through with real illustrative numbers, from a \$25M revenue goal down to the final Leads Needed figure.

How to use it: Use as a reference to check your own math is structured correctly, or to explain the cascade logic to someone seeing it for the first time.

Keeping the Cascade Honest

Assumption	Source	Owner	Refresh Cadence
Average Deal Size (by product)	Trailing 12-month actuals	Finance / Deal Desk	Quarterly
Pipeline Coverage Ratio	Trailing 12-month actuals, benchmarked against win rate	Sales Ops / RevOps	Quarterly
SQL-to-Opportunity Rate	Trailing 12-month actuals	Sales Ops	Quarterly
MQL-to-SQL Rate	Trailing 12-month actuals	MarkOps	Quarterly
Lead-to-MQL Conversion Rate	Trailing 12-month actuals	MarkOps	Quarterly
Retention Rate (Gross)	Trailing 12-month actuals	Customer Success / RevOps	Quarterly
Existing Customer ARR Base	Trailing 12-month actuals	Finance / Customer Success	Quarterly

Description: Every assumption the cascade math depends on (conversion rates, ACV, coverage ratio), with who owns it and how often it should be refreshed.

How to use it: Review on the stated cadence – a cascade built on stale assumptions looks precise while being quietly wrong.

Cascade Stage to CRM Field Mapping

Cascade Stage	CRM / MAP Field	Timestamp Captured	System of Record
Response	Campaign Member / Web Activity	Response Date	MAP
Lead Created	Lead / Contact Record	Created Date	CRM
MQL	Lead Status = MQL	MQL Date	CRM
SAL	Lead Status = SAL	SAL Accepted Date	CRM
SQL	Lead Status = SQL	SQL Date	CRM
Opportunity Created	Opportunity Record	Opp Created Date	CRM
Closed Won	Opportunity Stage = Closed Won	Close Date	CRM / Finance

Description: Maps each cascade milestone (Response, MQL, SAL, SQL, Opportunity, Closed Won) to the actual CRM field and timestamp that should be tracking it.

How to use it: Use as a build/audit spec to confirm your CRM is actually capturing the data the cascade math depends on.

The Number That Actually Goes to the Board

Metric	Value
Existing Customer ARR Base (\$)	
x Gross Retention Rate (%)	
x Expansion / Upsell Rate (%)	
= Forecasted Expansion ARR (\$)	
+ New Business Revenue Required (\$) (from the cascade above)	
= Total Forecasted ARR (\$)	

Description: The short list of cascade outputs distilled down to what leadership actually sees in a board deck.

How to use it: Use as a template for your own board or executive reporting, so the full cascade math resolves into a small, defensible set of numbers.
