

Chapter 16: The Handoff Contract

Table Reference

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

The Marketing-Sales Alignment Charter

Term	Agreed Definition	Agreed By
MQL (Marketing Qualified Lead)	A lead that has met the agreed-upon scoring threshold or behavioral criteria, signaling readiness for sales outreach	Pending Sales sign-off
SAL (Sales Accepted Lead)	An MQL that an SDR has reviewed and accepted as meeting qualification criteria	Pending Sales sign-off
SQL (Sales Qualified Lead)	A lead fully qualified by Sales through discovery, confirming budget, authority, need, and timeline	Pending Sales sign-off
Booked Meeting	A confirmed first meeting (discovery call, demo, etc.) with a qualified prospect sourced or influenced by a marketing activity	Pending Sales sign-off
Pipeline Sourced	An opportunity where marketing was the first-touch attribution for the account/contact	Pending Sales sign-off
Pipeline Influenced	Any open or closed opportunity where a marketing activity touched the contact or account within the attribution window	Pending Sales sign-off
Marketing Attribution Window	The defined period (typically 90 days) during which a marketing touch can receive attribution credit for influencing an opportunity	Pending Sales sign-off
Closed Won Attribution	DRAFT – proposed: Closed Won revenue where a marketing touch occurred within the same attribution window used for Pipeline Influenced. Needs explicit Sales/Finance sign-off before treating as final	Pending Sales sign-off

Description: The formal, shared definitions for every core term (MQL, SAL, SQL, Booked Meeting, and others) that Marketing and Sales need to agree on to avoid re-litigating what each one means.

How to use it: Use as the literal document to walk through with Sales leadership when formalizing your alignment charter – get real sign-off recorded in the “Agreed By” column, not just a verbal nod.

The Data Handoff Contract (Field-Level)

Field	Populated by MarkOps Before Handoff?	Sales-Owned After Handoff?	If Missing at Handoff
Original Lead Source	Yes	No – locked	Return to MarkOps queue; do not route
MQL Date & Score	Yes	No – locked	Return to MarkOps queue; do not route
Campaign / Touch Attribution	Yes	No – locked	Route with flag; MarkOps backfills within 24h
Intent Score (if ABM account)	Yes	No – locked	Route without intent context; note in SDR alert
Account Tier	Yes	Shared – Sales may re-tier with MarkOps sign-off	Default to Tier 3 pending review
Contact Title / Persona	Partial – enrichment tool best-effort	Yes – Sales confirms/corrects	Route as-is; Sales confirms on first call
Opportunity Amount, Close Date, Stage	No	Yes – fully Sales-owned from creation	N/A – not a MarkOps field

Description: Defines exactly which fields MarkOps must populate before a lead handoff, which become Sales-owned afterward, and what happens if a required field is missing.

How to use it: Use as a build spec for field-level permissions and validation rules in your CRM, so the handoff contract is enforced by the system, not just documented on paper.
