

Chapter 18: The Handoff, Measured

Table Reference

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

The Revenue Lifecycle Funnel

Funnel Stage	Definition	Volume (This Qtr)	Conversion to Next Stage	Industry Benchmark	Gap / Action
Responses (Raw)	Any trackable engagement with a campaign				
Marketing Qualified Leads (MQLs)	Responses that cross lead score threshold			10-15% of responses	
Sales Accepted Leads (SALs)	MQLs accepted by SDR team			>= 65% of MQLs	
Meetings Booked	First meeting confirmed			20-35% of SALs	
Opportunities Created	Qualified deal in CRM pipeline			50-70% of meetings	
Pipeline (\$)	Total value of open opportunities				
Closed Won	Revenue recognized			20-30% of pipeline	

Description: Every funnel stage (Responses through Closed Won) with its definition and real industry benchmark conversion rates, alongside blank columns for your own quarterly volume and conversion data.

How to use it: Populate the Volume and Conversion columns each quarter, then compare against the built-in benchmarks to see exactly which stage is underperforming.

Opportunity Stage Governance

Stage	Prob %	Entry Criteria	Exit Criteria	Required Fields
Discovery / Qualified	10%	First meeting held; ICP confirmed; pain identified; next step agreed	Technical or business case meeting scheduled; stakeholder map begun	Contact, Account, Close Date, Amount required
Evaluation	25%	Champion identified; business case being built; active evaluation underway	Proposal or POC delivered; economic buyer engaged	Champion name, next step date, competitors noted
Proposal / Negotiation	60%	Formal proposal submitted; verbal commitment from economic buyer; procurement engaged	Contract sent; final terms agreed; awaiting signature	Economic buyer name, expected close date, deal amount confirmed
Closed Won	100%	Contract fully executed; revenue recognized per finance policy	Customer onboarding triggered; account transferred to CS	Close date, ARR/deal value, lead source attribution locked
Closed Lost	0%	Prospect chose competitor, went no-decision, or deal fell through	Loss reason required; contact eligible for nurture re-entry after 90 days	Loss reason (picklist), competitor, loss date required

Description: Defines each opportunity stage's probability weighting, entry/exit criteria, and required CRM fields.

How to use it: Use as a build spec for CRM stage validation rules, so opportunities can't advance without meeting real, defined criteria.

Lead Recycling & Disposition Feedback Loop

Disposition Reason	Recycling Path	Cooldown Period	Re-Scoring Trigger	Owner
Bad Data / Invalid Contact	Route to data hygiene queue, not nurture	N/A – fix data first	Re-enrich and re-validate before any re-score	MarkOps
Not Ready (Timing)	Return to long-term nurture track	90 days minimum	Re-enters MQL flow if engagement threshold met again	MarkOps
No Response After Attempts Exhausted	Return to nurture; flag for lower-touch cadence	60 days	Standard behavioral re-scoring	MarkOps
Duplicate / Existing Opportunity	Merge into existing record; do not recycle	N/A	N/A	Sales Ops
Wrong ICP Fit	Suppress from active campaigns; do not recycle	N/A	Flag for scoring model review if pattern recurs (Chapter 12)	MarkOps

Description: Maps each disposition reason (bad data, not ready, no response, and others) to its recycling path, cooldown period, and what triggers re-scoring.

How to use it: Use as a build spec for automated lead recycling logic, so rejected leads follow a defined path back into the funnel instead of disappearing.

Handoff Health Metrics Dashboard

Metric	Definition	Target	Alert Threshold
Lead Aging Before Assignment	Time from MQL flag to SDR assignment in CRM	< 15 minutes	> 1 hour
Reassignment Rate	% of leads reassigned to a different rep within 7 days of first assignment	< 5%	>= 10%
Bounce-Back Rate	% of leads rejected by Sales more than once (see Lead Recycling table above)	< 3%	>= 7%
Average Time in Queue	Time a lead sits unassigned in the routing queue	< 30 minutes	> 2 hours

Description: The core metrics for monitoring handoff health (lead aging, reassignment rate, bounce-back rate, and others) with real targets and alert thresholds.

How to use it: Use as a build spec for your handoff monitoring dashboard, so a degrading handoff process triggers an alert instead of going unnoticed.

Diagnosing a Rising Bounce-Back Rate

Dominant Disposition Reason	What's Actually Broken	Where to Go
Wrong ICP Fit	The scoring model is admitting leads that don't match the profile it's supposed to be enforcing	Chapter 12's Fit score and conversion-curve validation
Bad Data / Invalid Contact	Records are entering the funnel with unusable or incorrect information before Sales ever sees them	Chapter 4's data hygiene diagnostics
No Response After Attempts Exhausted	SDR capacity or process, not lead quality – the lead was workable but didn't get worked	SDR staffing and process review, the same execution-gap pattern Chapter 9 diagnoses
Duplicate / Existing Opportunity	A CRM matching or deduplication gap is letting the same account generate multiple, separately-routed leads	Chapter 4's account matching and deduplication logic
Not Ready (Timing)	Usually healthy and not a system problem at all – the honest exception on this list	No action beyond confirming this isn't masking one of the other four

Description: Maps the dominant disposition reason behind a rising bounce-back rate to what's actually broken and which chapter has the fix.

How to use it: Use as a diagnostic flowchart the next time bounce-back rate climbs – pull your own disposition data and match the pattern before assuming you know the cause.
