Marketing Operations & Lead Management System

Multi-region lead qualification framework built across Marketo and Salesforce to manage acquisition, scoring, routing and sales readiness for a database of 20,000+ contacts.

20,000+
CONTACTS

Marketo + Salesforce
PLATFORM

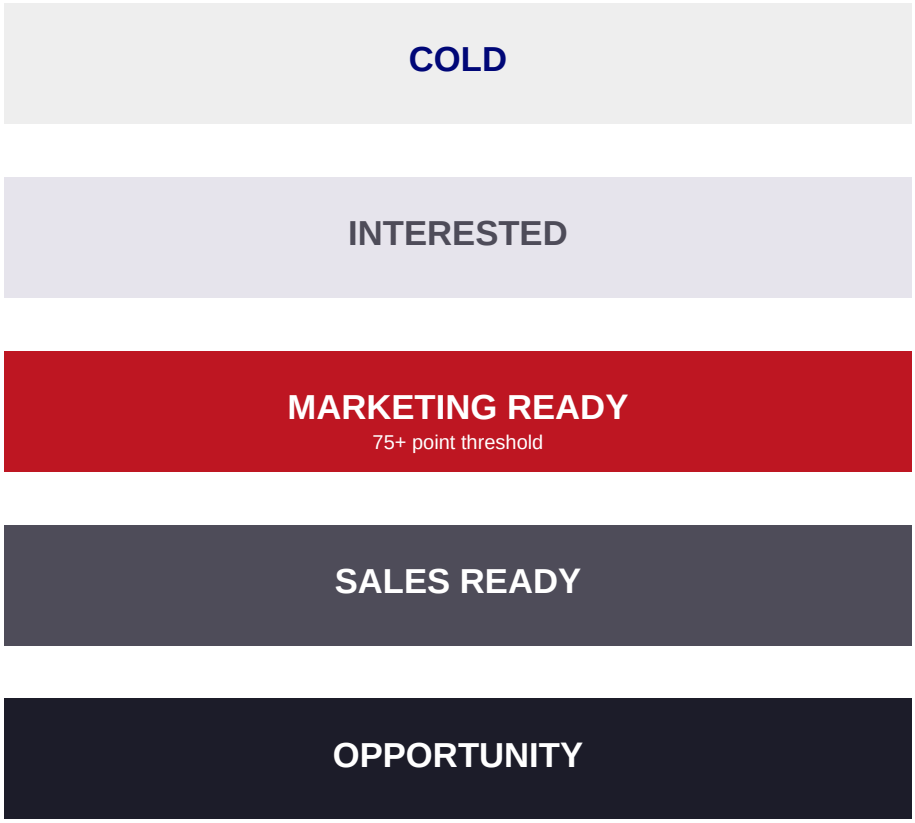
75 points
MARKETING READY THRESHOLD

Multi-region
B2B DEPLOYMENT

Lead Lifecycle

Cold record to commercial outcome

Six-stage progression



Exit paths

RECYCLED

DISQUALIFIED

NOT A LEAD

OUT OF SCOPE

Lead Scoring Model

Qualification signals and threshold triggers

Points by activity and content tier

EVENTS AND WEBINARS	
Webinar Registration	**+10**
Webinar Attendance	**+20**
Webinar-SS Attendance	**75 -> MQL**
Hosted Event Registration	**+10**
Hosted Event Attendance	**+20**
Tradeshow Booth Visit	**+10**
Tradeshow Session Attended	**+20**
Attended - To Be Qualified	**75 -> MQL**
CONTENT DOWNLOADS	
LP Content	**+15**
EP Content	**+20**
VB / SS Content	**+45**
DIRECT QUALIFICATION	
Telemarketing - Engaged	**75 -> MQL**
Upgrade Request - Engaged	**75 -> MQL**
No activity per 6 months	**-10**

75 points = Marketing Ready qualification queue

MQL to SRL Qualification Process

Marketing qualification and sales handoff

1

Daily Queue Review

Monitor Marketing Ready leads and contacts every day. Assign ownership and check for duplicates.

2

Data Validation

Verify account match, job function, department, phone, preferred language and other mandatory fields.

3

BANT Assessment

Assess potential opportunity, choose SRL product, document activity type and attach qualification notes.

4

Sales Ready Lead Created

Lead converts to contact or status updates to Sales Ready. Qualification record is logged.

5

Account Owner Alerted

Sales owner receives the handoff. Opportunity creation or recycling follows.

CRM Governance

Data quality, attribution and segmentation controls

DATA QUALITY

- Duplicate detection across Lead + Lead, Contact + Contact, Lead + Contact.
- Merge workflows preserve campaign history and activity logs.
- Lead vs Contact creation rules tied to account identification.
- Lifecycle changes managed through qualification wizard.

ATTRIBUTION

- Acquisition Program captured at contact creation.
- Campaign History logs full engagement across programs.
- UTM-linked child campaigns connect source to SFDC campaign ID.
- Primary Campaign Source supports opportunity attribution.

SEGMENTATION

- Contact and lead objects governed by lifecycle logic.
- Account matching via CSN and sales territory ownership.
- Influencer classification: associations, consultants, journalists, freelancers.

Commercial Measurement

What the system made visible

VOLUME

MQL Volume

CONVERSION

MQL to SRL Rate

PIPELINE

Marketing-Sourced Opportunities

REVENUE

Opportunity Value

DATA HEALTH

Attribution Coverage %