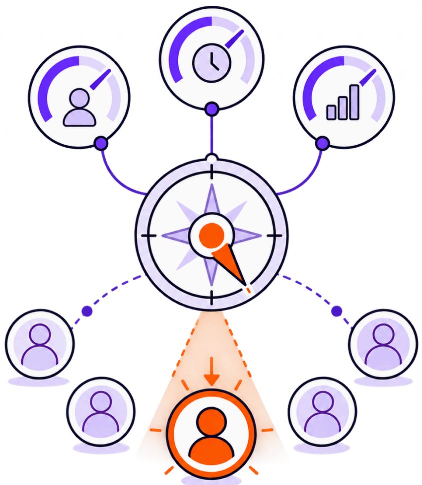
Which lead first

The ranking rule that belongs before the campaign, not after it



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15 PAGES TO PRINT AND FILL IN · 3 DIAGRAMS

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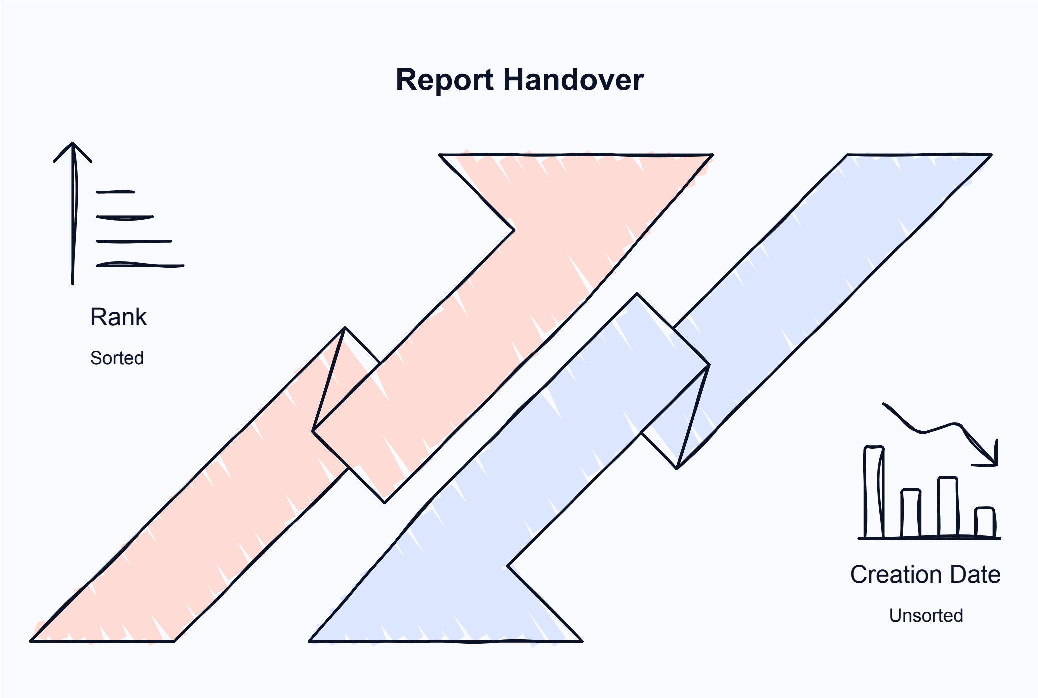


SKETCH · TWO LANES

Who this is for, and who should skip it

The most expensive mistake in lead generation does not happen during generation. It happens after: the prioritisation gets built once the leads have already arrived. By then the first wave has been worked, in the order it came in.

This is for you if pipeline generation is newly starting to work at your company. The first campaign is live or about to be, and inbound volume is rising to the point where nobody can touch every contact on the same day.

Skip it if you run an established inbound machine. There the ranking was settled long ago, usually inside a scoring model that grew over years, and this document pushes on an open door. The more useful question in that situation is whether the grown model still measures what it was built to measure.

And the distinction that gets confused most often: this is not routing.

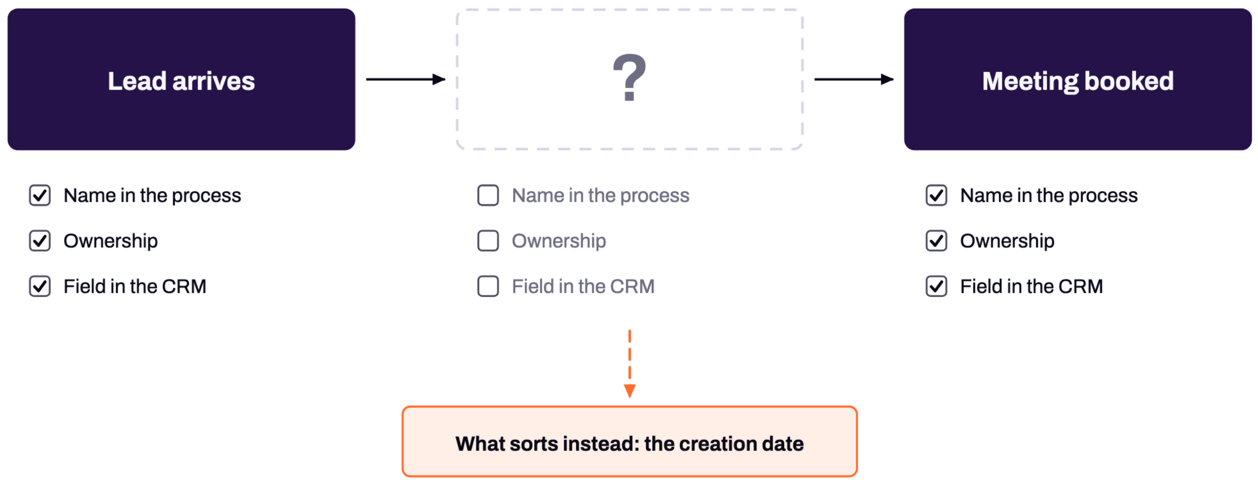
	ROUTING	PRIORITISATION
Question	**Who** works this lead?	In **what order**?
Solved by	assignment rules in the CRM	a rule an SDR carries in their head
Failure shows	immediately, the lead sits with the wrong person	late, everyone got worked

A well configured routing setup distributes an unsorted list reliably to the right people. The order in which each of them works their own list is not in there. That is what this is about.

The mistake sits behind generation, not inside it

Between "lead arrives" and "meeting booked" there is a step nobody owns. It has no name in the process, no clear ownership, and no field in the CRM.

GRAPHIC G1



The report still holds: volume arrived, volume was touched.

What happens instead is frequently the same: the list gets worked top to bottom, and the top is the newest entry. The contact who has been sitting for four days and belongs squarely in your target segment slides down, while a fresh newsletter subscriber gets called first.

Why this stays invisible for a long time. The campaign produced leads, the leads got worked, and the report holds: volume arrived, volume was touched. What the report does not contain is the order. A team can hit every metric for months and still let the better contacts go cold, systematically.

Prioritisation looks, at planning time, like a detail you can retrofit. It is in fact the point where contacts turn into qualified opportunities. Retrofitting means the first wave is already through.

Why the step has no owner has a mundane reason: it falls between two responsibilities. Marketing considers its work done once the contact is in the system. Sales considers its work started once someone touches the contact. In between sits the question of which one gets touched first, and it belongs to neither.

The objection that comes up here regularly, verbatim from a project conversation: *"We already have a CRM, people can see the new contacts in it."* That is exactly the point. They can see them. What they cannot see is which one goes first, and a system only shows an order once somebody has put one in.

Three signs, all visible before the first campaign

You can observe all three before launch. Two of them means you need the rule from step 1 before the campaign goes live.

EVIDENCE what a signal really tells you

1 · Nobody can say in one sentence which lead gets worked first.

Ask the question, and not of the head of sales. Ask the SDR who opens the list in the morning. If the answer is "the newest ones" or "I have a look," there is no rule. If there is a rule but each person names a different one, there are three rules, which amounts to the same thing.

2 · The list has no column that carries an order.

Not score, not lifecycle stage, not lead status. A column that answers: does this one go before that one? If the only available sort is creation date, the list gets sorted by creation date.

3 · The first call starts from zero.

The SDR opens the contact and sees name, company, email. What the contact did to land in this list is either absent or buried in an activity log nobody reads mid-call. The opening line is then necessarily a question instead of an observation.

What is not a sign, although it often gets read as one: a low reply rate. That can come from the audience, the approach or the timing. The three signs above are specific. A bad rate is not.

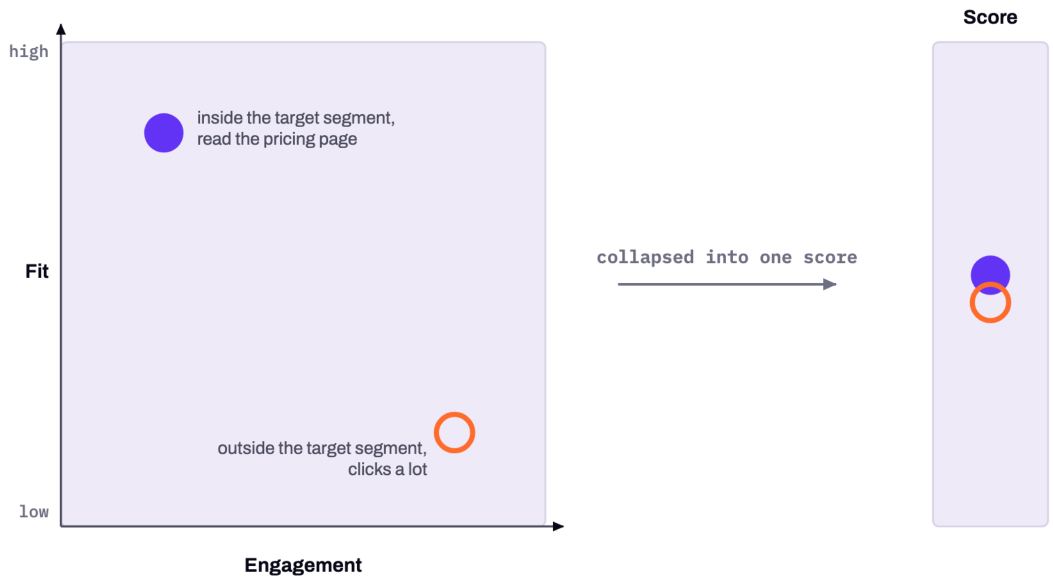
Two axes, not one number

The most common build is a single point value that everything feeds into. It is quick to build and answers the wrong question: it tells you "how hot," not "hot why."

Two things decide separately, and they are not interchangeable:

AXIS	QUESTION	CHANGES
Fit	Does this company belong in our target segment at all?	rarely. Company size, industry, role
Engagement	What did this person do, and how close to a buying decision was it?	constantly. Every interaction moves it

GRAPHIC G2



Same number. Two situations, two answers.

Why the separation is the whole point. Inside a single sum, three weak signals beat one strong one. A contact outside the target segment who clicks a lot then lands ahead of a contact inside it who read the pricing page. Kept apart, you see immediately that one has high engagement at low fit, and that is a different situation with a different answer.

The two axes produce a matrix. Every contact falls into exactly one cell, and each cell has its own action:

	HIGH ENGAGEMENT	MEDIUM ENGAGEMENT	LOW ENGAGEMENT
high fit	call now	call	approach with a reason
medium fit	call	nurture, watch	nurture
low fit	check: competitor?	nurture	do not call

The top-right cell is the interesting one and the most often missed: high fit, low engagement. That is a target account doing nothing. It does not belong at the bottom of the list, it belongs in a different approach. A call with no reason is cold outreach, and cold outreach does not belong in the same handling logic.

The bottom-left cell is a warning: low fit, high engagement. Frequently a competitor, a job applicant, or somebody using your material for their own development. Teams that do not separate these end up ranking exactly those contacts to the top.

Source · how the lead scoring tool works · knowledge.hubspot.com

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lead scoring in HubSpot, in full

turning an account score into an action

Filling the axes without turning it into a scoring project

A full scoring model is the wrong answer here. Not because scoring is bad, but because it takes weeks, assumes data that does not exist yet, and produces a number an SDR cannot use in a conversation.

Fit: binary, from three observable attributes

Company size, industry, role. No middle value, no points. If you cannot describe your target segment in three attributes, you do not have a prioritisation problem, you have a segmentation problem, and that comes first.

Engagement: ordered by proximity to a buying decision, not by volume

Not "engaged," but **what** they did. Reading the pricing page ranks above downloading a whitepaper, which ranks above subscribing to the newsletter. You set that order once, not per campaign.

Three things teams forget, and they carry most of the value

Negative points. An opt-out, a last activity more than 90 days ago, a free-mail address. On the free-mail address the reason is not snobbery: without a company domain the company cannot be resolved, and the fit axis is blind.

A ceiling on the engagement value. Without one, a single contact can run arbitrarily high. The case where this surfaces is always the same: somebody downloads every resource systematically, collects more points than any genuine prospect, and sits at the top on Monday morning. Frequently that is a competitor. So cap the value, **not** the number of sources allowed to contribute. Several different sources are a better signal than one source repeated.

New forms have to be added. A form that is not in the scoring does not count. Anyone who builds a new webinar form and forgets the entry has a campaign that stays invisible to the scoring. This is not one-time setup, it is a small recurring maintenance task with named ownership.

NEXT DECISION

the leaner way into ABM

The conflict at launch, and how to resolve it

If you build the matrix and set the clean threshold immediately, this happens regularly: **the list is empty.** No contact clears high fit and high engagement at the same time, and nobody can judge whether the rule is any good.

That is not a flaw in the rule. It is the normal starting position before enough signal has come in.

The sequence that works runs the other way:

PHASE	THRESHOLD	PURPOSE
Launch	wide, including the middle cells	have contacts to look at at all
After 4 weeks	tighten against the feedback	drop the cells nothing came out of
Then	stable, adjusted occasionally	maintenance, not a project

Starting wide and tightening is easier than the reverse. A threshold that is too tight produces no data you could correct it with. One that is too wide produces feedback, and the feedback is the actual data source.

What that requires: the feedback has to come back. That is not a technical problem, it is an agreement. Concretely: which reason gets recorded when a lead is rejected, and who reviews those reasons weekly?

And for it to come back it needs a slot, not goodwill. A fixed weekly pass through the rejection reasons works differently from a request. Manuel Hartmann describes that effect in his LinkedIn newsletter *Diary Of A CRO* as a predictable ritual that shifts the incentive from "the boss complains" to "I do not want to be the first one showing red". (Read the issue, in German)

Twenty minutes, a fixed time, the same list. Nothing more is needed.

The most revealing analysis is the least comfortable one: look at the rejected leads with the highest rank. If contacts the sales team disqualifies immediately keep appearing at the top, the rule is measuring something other than buying readiness. That is the sharpest signal available to you, and it costs nothing but looking.

The filter needs more than the rank

A contact can rank high and still not belong in the queue. Four exclusions belong in the filter, or embarrassing cases land in the cold-calling list:

EXCLUSION	WHY
Already a customer	a cold call to an existing customer costs more than the lead is worth
Has an open deal at the company	otherwise two people from your team talk to the same firm in parallel
Handed over within the last twelve months	the same contact a second time with nothing changed
On the suppression list	objections, competitors, your own staff

The second one costs the most and gets checked the least. An open deal means somebody on your team is building a relationship. A parallel cold call to another person at the same company turns a coordinated approach into a coincidence, and the customer notices.

And one exclusion that should not be one: a previously disqualified contact is not permanently burned. "Not right now" is frequently a question of timing rather than suitability. Those contacts belong in nurturing with a follow-up date, not on a suppression list. The difference between "no fit" and "wrong timing" belongs recorded as its own disqualification reason, otherwise you cannot separate them later.

Why that is not a bookkeeping question: fit can be tested, timing cannot. Manuel Hartmann puts it this way in his LinkedIn newsletter *Diary Of A CRO*: timing is not something you can qualify away or pitch away. (Read the issue, in German) Put both reasons in the same bucket and you lose exactly the contacts where only the date was wrong.

Already stuck on criterion 1?

If fit cannot be decided as a binary, the ranking is not your constraint, the segment definition is. That is different work, and it comes first. In a free 60-minute Launchpad we tell you within the hour which of the two it is at your end.

thesalesplaybook.com/book-a-call · no pitch, an honest assessment

Source · creating workflows · knowledge.hubspot.com

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intelligent lead routing in HubSpot

What has to be on the lead so the first call does not start from zero

The ranking says who comes first. It does not say what the SDR then says. For that, the contact needs four pieces of information, visible on the record rather than three clicks deep in a log.

INFORMATION	WHY IT CARRIES THE CONVERSATION
The triggering action, in plain words	"Read the pricing page" is an opening. "Score 47" is not
When it happened	decides the first sentence. Two hours ago allows a reference. Three weeks ago does not
Where the contact came from	campaign, search, referral. Determines what they already know
What they have not seen yet	stops the SDR explaining something the contact read last week

The fourth is missing most often and saves the most. An SDR who does not know what the contact has read starts at the basics. The contact listens for two minutes to something they already know, and draws a conclusion about the caller's competence.

The handover note

The single most effective step here: on handover, a **note on the lead** is created automatically, summarising the four items in two or three sentences. Not the raw record, the context.

Why that beats four clean fields: fields get skimmed, a sentence gets read. And the note forces the marketing side to justify the handover in their own words. If no sensible sentence can be written, the lead was not ready to hand over.

What does not belong on the record: the full activity history. It is not readable mid-call, and its presence hides the four items above. Four lines that get read beat forty that get skimmed.

Source · [creating and editing properties]() · knowledge.hubspot.com

GO DEEPER

which fields really have to be mandatory

An expensive special case: event attendees

The pattern is widespread and looks reasonable: after the webinar the attendee list is imported and handed to sales in full. The feedback is almost always the same. Quality was poor, the conversations went nowhere, and when an external team does the calling, nothing comes back at all.

EVIDENCE [source attribution in HubSpot, in practice]

The conclusion usually drawn from that is wrong. It goes: webinar leads are worthless, we will stop handing them over. That discards a genuine signal source.

What actually happened: attendance is an engagement signal and says **nothing about fit** on its own. Handing over the full list hands over one axis without the other. On the other end sits somebody who found a topic interesting and was not expecting a sales call.

The fix is not less handover, it is the fit filter in front of it:

1. Attendance counts as engagement, weighted meaningfully. It is a real signal.
2. Only contacts that **also** clear the fit axis get handed over.
3. The rest goes into nurturing with a follow-up that produces further signal: the recording, deeper material, one specific question.
4. Whoever responds there rises on engagement and comes back into scope on the next pass.

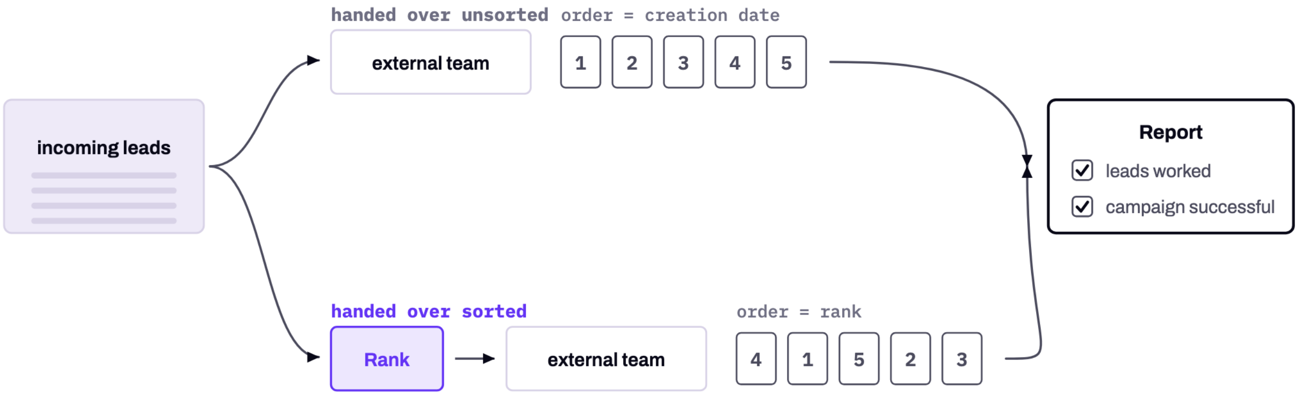
The side effect is the actual gain: the follow-up produces exactly the signal that was missing before. A list that used to be spent once becomes a source that carries several times.

And one technical detail with outsized effect: import attendees as event attendance, not as an anonymous list. Only then is the touchpoint available later as an attribute that can feed the engagement axis. An import without that mapping produces contacts without context, and context is the entire point here.

The outsourced-execution case

When execution goes to an external team, the problem gets worse in two ways at once.

GRAPHIC G3



Both paths produce the same report. The loss sits in a result that was never measured.

An external team works the list it receives, in the order it receives it. That is not carelessness, it is the reasonable assumption that a handed-over list is sorted. Handing it over unsorted delegates the order, silently, to the creation date.

The cost is double:

Good contacts get the same treatment as weak ones. A contact inside the target segment who just read the pricing page gets the same script and the same timing as a newsletter subscriber from six weeks ago.

And the campaign still counts as a success. It produced leads, the external team worked them, the reports hold. The loss is invisible, because it sits in the gap to a result that was never measured.

Four things belong in the handover, and all four cost minutes:

1. **The rank column, sorted.** Not the criteria, the result.
2. **The four items from page 10** per contact, in named columns.

3. **The handover note**, where one exists.
4. **One line on what separates the top rank from the rest**, in plain words. An external team does not know your target segment the way you do.

And the question to settle before outsourcing: who corrects the rule when it does not hold? An external team rarely reports back that the sorting makes no sense. It works the list. So agree explicitly that disqualification reasons flow back, and in what format.

How to tell you are late, and what still works

Late means: the campaign is running, the contacts are in, some have been worked. That is the normal case in which this gets read.

The three tells:

Contacts inside the target segment closed as "contacted, no response," where the first attempt came days after their action. The response is not missing, it has expired.

An SDR who, asked for the best lead of the week, names one they happened to stumble on. Coincidence is not a process, but it shows the list had substance in it.

A reply rate falling week over week while volume rises. That is the signature of always-newest-on-top: the more inbound, the deeper the good contacts sink.

What rescues the situation

Do not write off the contacts already worked. A contact inside the target segment who got a weak call at the wrong time is not burned. They were not convinced, which is a different thing. They go back into the list, with the ranking rule and a different reason to call.

Apply the rule retroactively to the existing base before the next wave lands. The base is usually larger than a week of inbound, and the top rank inside it is the fastest meeting available.

What does not help: pausing the campaign to build a scoring model first. The inbound is the valuable part. The matrix on page 6 gets built in an afternoon.

> GO DEEPER
>
> [making response time measurable]

The objection, and the checklist

The objection that comes up almost every time:

> *"We already have a CRM, people can see the new contacts."*

That is precisely the point: they can see them. They cannot see which one goes first.

A CRM shows everything, sorted by whatever it defaults to. Visibility is the precondition, not the solution. The question that decides it is not whether the contacts are findable, it is whether two SDRs opening the same list start with the same contact.

Two more, shorter:

> *"Our leads are all about equally good."* → Then the rule costs nothing, and the assumption is testable within a week: top rank against bottom rank, compare meeting rates.
>
> *"Our scoring handles that."* → Check whether it produces an order or a number, and whether fit and engagement are visible separately. A sum that rates two very different contacts identically has not answered the question.

Checklist

- [ ] Target segment described in three observable attributes
- [ ] Fit binary, no middle value
- [ ] Actions ordered by proximity to a buying decision, not by frequency
- [ ] Fit and engagement as separate axes, not one sum
- [ ] Negative points set: opt-out, inactivity, free-mail domain
- [ ] Ceiling on the engagement value, but no cap on the number of sources
- [ ] Named ownership for adding new forms to the scoring
- [ ] Started wide, date set for tightening after four weeks
- [ ] Disqualification reasons flow back, somebody reviews them weekly
- [ ] Rejected leads with a high rank analysed
- [ ] Four exclusions in the filter: customer, open deal, repeat, suppression
- [ ] "No fit" and "wrong timing" recorded separately
- [ ] The four items from page 10 visible on the contact record
- [ ] Handover note with two to three sentences of context
- [ ] Event attendees run through the fit filter, not handed over wholesale
- [ ] If outsourced: rank column, four items, note and one line of explanation
- [ ] Existing base sorted through once, retroactively

Next step

The matrix gets built in an afternoon. What takes longer is the question before it: whether your target segment is sharp enough that fit becomes a binary call. If you are stuck there, you do not have a prioritisation problem.

Where this document reaches its limit: it orders what arrives. If too little arrives, the ranking is not the constraint, and pipeline generation is the closer lever. If enough arrives and nothing closes, the constraint sits behind the handover, in qualification and deal progression.

In a **free 60-minute Launchpad** we look at your list and tell you which of those three constraints is the largest one for you. Including when the answer is that we are not the right partner for it.

Free, 60 minutes, no pitch, an honest assessment of whether there is a fit.

WHO YOU WILL MEET IN THE LAUNCHPAD

Erik Steffen

HubSpot GTM Lead · SalesPlaybook

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Sources quoted

The statements quoted verbatim come from the public LinkedIn newsletter *Diary Of A CRO* by Manuel Hartmann, founder and CEO of SalesPlaybook (https://www.linkedin.com/newsletters/diary-of-a-cro-7463115808336986112/). The issues are in German:

- "10 Hausregeln für Vertrieb mit Verstand im Zeitalter von KI" · https://de.linkedin.com/pulse/10-hausregeln-f%C3%BCr-vertrieb-mit-verstand-im-zeitalter-von-hartmann-wzlee

Objections quoted verbatim come from our own project conversations and are anonymised: no client name, no industry, no figures.

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