SalesPlaybook

2026

Which lead first

The ranking rule that belongs before the campaign, not after it: two axes, four exclusions, four items on the lead and a checklist to fill in.

For teams where pipeline generation is starting to work

Used by

node.energy knk workist SpotCom EXPERTS INSIDE

At a glance

A ranking rule for incoming leads, built from two axes, four exclusions and four items on the lead. For teams where pipeline generation is just starting to work and nobody can touch every new contact on the same day anymore.

01 The three signs that show you, before the first campaign, that the ranking is missing.

02 The matrix of two axes, fit and engagement, and how to fill it without a scoring project.

03 The four exclusions for the filter and the four items that have to be on the lead.

04 The special cases of event attendees and outsourced execution, including the handover to an external team.

05 A seventeen-point checklist you tick off for your own team.

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.

NOT YET IF

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

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Rather work on your own lead list? We hold it against the matrix in 60 minutes.

Book Strategy Call

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00

BEFORE YOU SORT

Who this workbook is for

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.

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.

What you will have at the end: a ranking built from two axes, four exclusions for the filter, four items that have to be on the lead, and a seventeen-point checklist you tick off for your own team. Every page stands on its own: if you are short on time, jump straight to the step where it is stuck at your end.

First the diagnosis: where the order gets lost, and how to see it before launch.

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01

THE DIAGNOSIS

Where the order gets lost, and the three signs visible before the first campaign.

The mistake sits behind generation

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.

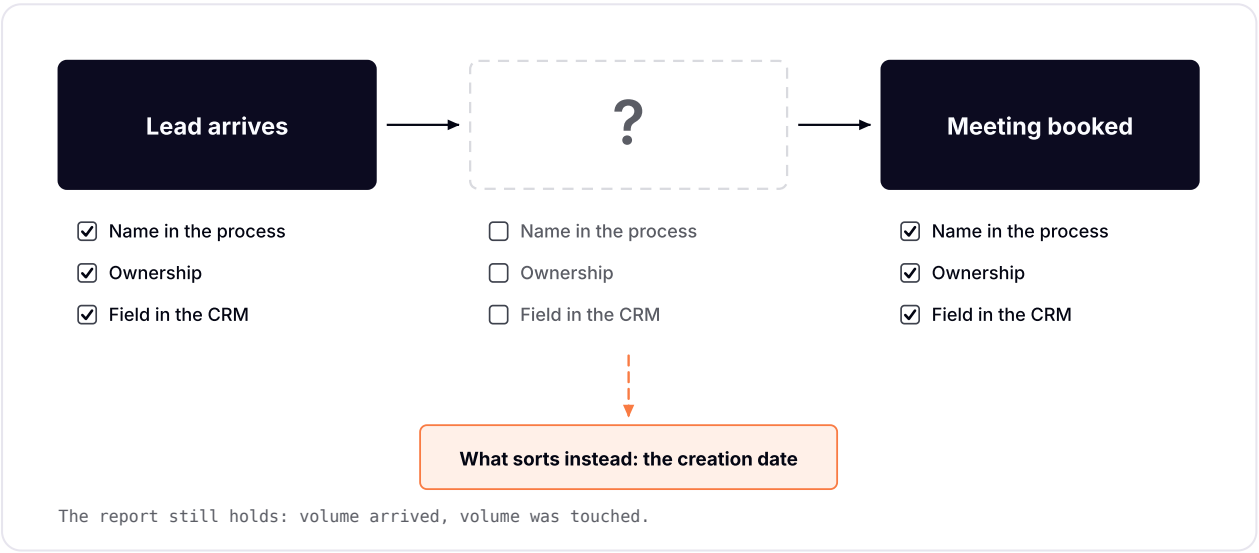

Figure 1 · The unowned step between arrival and meeting

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.

Our view: 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 mistake stays invisible

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.

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.

Marketing

considers the work done once the contact is in the system. What gets measured is the volume that arrives.

Sales

considers the work started once someone touches the contact. What gets measured is whether everyone got worked.

> **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.

That order is what this workbook sets. Before you build it, take an honest look at whether it is missing at your end today. There are three signs for that, and you can observe all of them before launch.

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Three signs, before the first campaign

You can observe all three before launch. Two of them means you need the rule from chapter 2 before the campaign goes live.

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 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.

node.energy

Meetings generated

5x More Demos with AI-Powered Outbound on Clay & HubSpot

When the first call no longer starts from zero. node.energy generates 5x more demos in three months through targeted outbound with Clay integrated into HubSpot. The SDRs receive contacts and direct phone numbers with the right trigger at the right time.

Timeframe: Under 3 Months

Read case →

Evidence: what a signal really tells you

Two signs apply? Then here is the rule, and it consists of two axes instead of one number.

02

THE RULE

Two axes instead of one number, filled in an afternoon and tightened within four weeks.

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

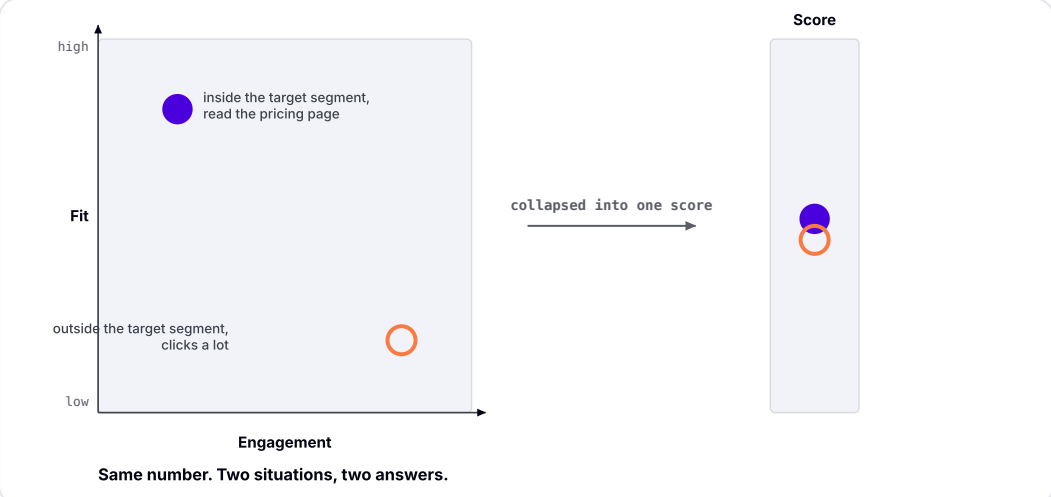

Figure 2 · Two contacts, the same score, two different situations

Our view: the separation is the whole point. Inside a single sum, three weak signals beat one strong one. Kept apart, you see immediately that one contact has high engagement at low fit, and that is a different situation with a different answer.

A contact outside the target segment who clicks a lot lands, inside the sum, ahead of a contact inside it who read the pricing page. That is what the figure shows: the same number, two situations.

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Two axes make one 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.

GAIA Outcome achieved

30+ booked ICP calls & 2x Website Visitors through LinkedIn GTM

Engagement counts when it comes from the target segment. 30+ booked ICP calls and 2x website visitors from over 2k content engagements, in under three months.

Timeframe: <3 months **Read case →**

Source: how the lead scoring tool works · knowledge.hubspot.com. *Go deeper:* lead scoring in HubSpot, in full · turning an account score into an action

Filling the axes without 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, 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. Cap the value, not the number of sources: several different sources are a better signal than one source repeated.

Adding new forms

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. A small recurring maintenance task with named ownership.

Next decision: the leaner way into ABM

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The conflict at launch

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

Our view: 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: 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.

> **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.

03

FILTER AND HANDOVER

Four exclusions, four items on the lead, and the two special cases that cost the most.

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. “No fit” and “wrong timing” therefore belong recorded as two separate disqualification reasons. Put both reasons in the same bucket and you lose exactly the contacts where only the date was wrong.

Why that is not a bookkeeping question: fit can be tested, timing cannot. Manuel Hartmann puts it this way in *Diary Of A CRO*: timing is not something you can qualify away or pitch away (read the issue, in German).

What has to be on the lead

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.

Our view: 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 workflows · creating and editing properties · knowledge.hubspot.com. *Go deeper:* intelligent lead routing in HubSpot · which fields really have to be mandatory

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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.

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.

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.

> **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.

Evidence: source attribution in HubSpot, in practice

Special case: outsourced execution

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

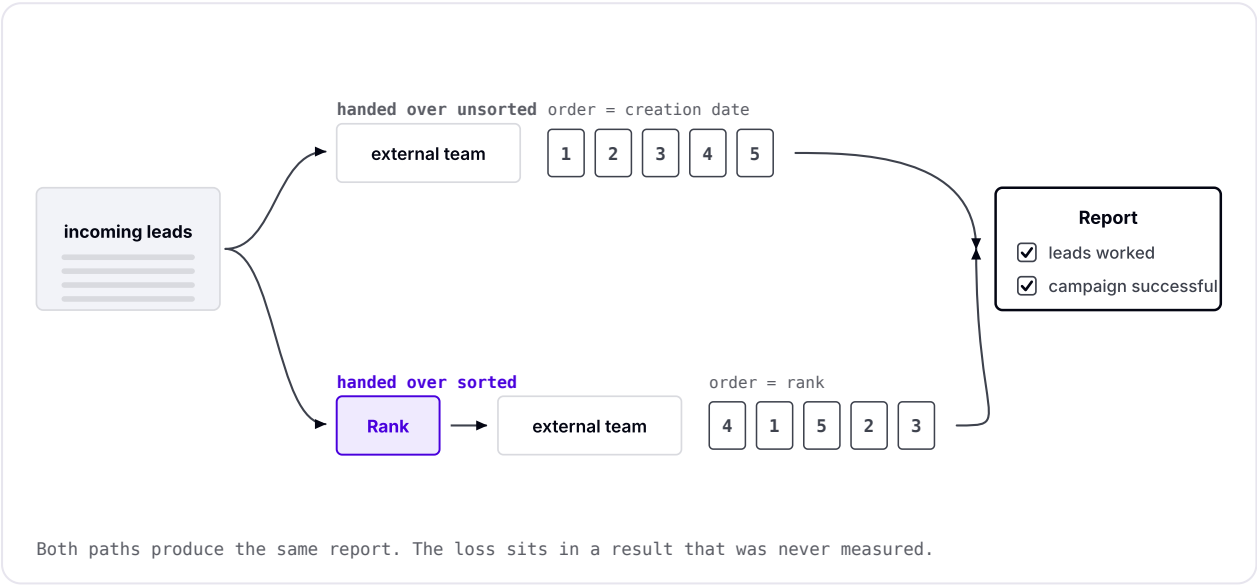

Figure 3 · Two handover lanes, one and the same report

The cost is double. Good contacts get the same treatment as weak ones: the same script and the same timing as a newsletter subscriber from six weeks ago. And the campaign still counts as a success. The loss is invisible, because it sits in the gap to a result that was never measured.

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What belongs in the handover

Four things belong in the handover to an external team, and all four cost minutes:

1 · RANK COLUMN	**sorted.** Not the criteria, the result.
2 · FOUR ITEMS	the four items from the page “What has to be on the lead” per contact, in named columns
3 · HANDOVER NOTE	where one exists
4 · ONE LINE OF EXPLANATION	what separates the top rank from the rest, in plain words. An external team does not know your target segment the way you do.

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. The simplest version is the same picklist your own team uses, with “no fit” and “wrong timing” as separate values, and the same weekly slot from chapter 2.

Can you not yet call fit with a clear yes or no? Then the ranking is not your constraint, the segment definition is. In a free 60-minute strategy call we tell you which of the two it is at your end.

Book Strategy Call

And if the campaign is already running? Then it is not too late, just different.

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04

WHEN IT IS ALREADY RUNNING

How to tell you are late, what still works, and the checklist for your team.

How to tell you are late

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

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

B **An SDR, 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.

C **The reply rate falls 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 from chapter 2 gets built in an afternoon.

Go deeper: making response time measurable

The objections

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.

The test for your team, tomorrow morning: give two SDRs the same list and ask both which contact they start with. If they name different ones, the rule is missing. If they name the same one, ask why. If the reason is not on the lead, the handover note is missing.

The checklist

Tick it off for your own team. Every item points to a step in this workbook.

Checklist Is the ranking in place before the campaign?

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

Several points still marked “open”? Then the strategy call is the shortest route: we go through your open points and work out whether the ranking is the constraint or the target segment before it.

Book Strategy Call

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The 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 workbook 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.

Digital Republic Outcome achieved

800+ Replies in 3 Months from a Scaleable Outbound Engine

When too little arrives. SalesPlaybook implemented HubSpot CRM and launched a targeted outbound campaign, achieving response rates of 20–35% across more than 4,000 emails. This enabled Digital Republic to expand its pipeline and efficiently roll out its go-to-market strategy.

Timeframe: under 3 months **Read case →**

Fill in the self-assessment first: form.jotform.com/240112515833345.
All success stories: thesalesplaybook.com/clients

Sources quoted. The statements quoted verbatim come from the public LinkedIn newsletter *Diary Of A CRO* by Manuel Hartmann, founder and CEO of SalesPlaybook, issue "10 Hausregeln für Vertrieb mit Verstand im Zeitalter von KI" (in German). Objections quoted verbatim come from our own project conversations and are anonymised: no client name, no industry, no figures.

SalesPlaybook designs, builds and operates Pipeline Generation, HubSpot CRM and Revenue Enablement as one connected revenue system, for B2B technology companies with 25 to 500 full-time employees in the DACH region.

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PIPELINE GENERATION STRATEGY CALL

Does your team know tomorrow morning which lead goes first?

In 60 minutes we hold your lead list against the matrix and the checklist in this workbook: whether the ranking is the constraint, the target segment before it, or the qualification behind it.

- We work through your situation together, on your list, not on slides.
- You get a clear fit or no-fit assessment.
- You leave with a concrete next step. If working together makes sense, we define a fixed scope before implementation begins.

01

You choose the area
on the booking page, the one under most pressure.

02

We work through it
60 minutes, on your system, not on slides.

03

You leave with a next step
and a clear fit or no-fit assessment.

Book Strategy Call
`thesalesplaybook.com`

Free · 60 minutes · no pitch · a straight fit-or-no-fit answer

Printed? Scan to pick a time.

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