

Marketing and Sales Lead Handoffs

UNDERSTAND AND ASSESS

TIME: 60 minutes | OUTPUT: A draft service agreement and a clear exception path.

Name / team: _____ Date: _____

Complete this with marketing and sales together. Define a lead as ready only when both teams understand the evidence and expected next step. Start with one lead type or market to keep the agreement testable.

Key idea

Routing assigns responsibility. Acceptance confirms that sales will work the lead. Disposition records what happened. An effective handoff includes all three, plus a return path when the lead is not ready.

Illustrative agreement: Consultation requests with required contact and context fields route to the territory owner. Sales reviews within one business day in the agreed time zone. Missing territory goes to a named queue owner. Confirm staffing before adopting this timing.

Which exact lead type is covered, and what makes it ready for sales?

What information must accompany the lead: need, source, history, and contact details?

Which business hours, time zone, coverage, and exceptions apply?

Marketing and Sales Lead Handoffs

BUILD YOUR WORKING PLAN

Agree the handoff rules

Specify when each clock starts and stops. Distinguish a first attempt from a meaningful response. Define rejection reasons such as duplicate, outside scope, or insufficient information, and require a next step rather than a silent status change.

Decision point	Rule / deadline	Accountable owner	Evidence / escalation
Ready for handoff			
Assignment / backup			
Acceptance or rejection			
First follow-up			
No response / overdue			
Return to nurture			

What happens when no owner is available or assignment is ambiguous?

Which statuses and reasons will both teams use consistently?

When can a returned lead re-enter, and how will prior activity remain visible?

Marketing and Sales Lead Handoffs

VALIDATE AND TAKE ACTION

Completion checklist

- ☐ Readiness criteria and required fields are agreed by both teams.
- ☐ Ownership, backup coverage, and response clocks are explicit.
- ☐ Rejection and nurture paths preserve context and consent rules.
- ☐ Overdue leads have a named escalation owner.
- ☐ A sample lead can be traced from submission through disposition.
- ☐ Both teams have approved a review date and reporting definitions.

Measure what changes

Review acceptance rate, time to first attempt, overdue leads, and downstream opportunities separately. Define each denominator and distinguish business-hour timing from elapsed time.

Our baseline / target / data source / review date:

Suggested implementation rhythm

Pilot one lead type and review exceptions together.

Inspect rejected and overdue examples to find process gaps.

Revise the agreement based on outcomes, then expand coverage.

First action / accountable owner / due date:

Open issue / decision needed / approver:
