

Lead Qualification and Sales Handoff System Planner

Define the buyer evidence, scoring model, stage contract, human decisions, routing fallbacks, tests, and operating review for one inbound offer.

Course: <https://flowgrammer.ca/courses/build-lead-qualification-system>

Complete one section after each lesson. Use one real offer and recent sanitized lead examples. Unknown values stay unknown until an approved source or reviewer resolves them.

1. ICP evidence model

Define one offer, observable fit, exclusions, evidence sources and unknown handling.

A criterion is usable when two reviewers can inspect the same evidence and explain their decision.

Offer and qualification decision

Criterion	Include / exclude / review	Allowed evidence	Unknown action

Explicit exclusion or escalation	Evidence required	Outcome and owner

[] One offer [] Observable criteria [] Existing relationships checked [] Unknown is not negative

2. Scoring rules

Keep fit, engagement, timing, negative signals and confidence visible.

Dimension and signal	Value / points / band	Evidence source	Unknown or decay rule

Threshold or condition	Recommended action	Owner	Review trigger

Override rule, reason codes, and model version

3. MQL, acceptance, and SQL contract

Define ownership and evidence at every handoff.

State	Observable definition	Required evidence	Owner	Next decision

Sales review target and missed-target fallback

Decision	Reason codes	Destination	Owner

☐ MQL threshold defined ☐ SAL choice justified ☐ SQL requires human acceptance ☐ Recycle differs from decline

4. AI and human responsibility map

Assign the least risky capable mechanism and name every human gate.

Current bottleneck: inbound review, outbound capacity, or process clarity

System step	Rules / AI / human / repair	Evidence shown	Decision owner	Pause or correction path

People own SQL acceptance, sensitive exceptions, contact decisions, discovery, policy changes, and commercial commitments.

5. Routing and fallback matrix

Give every qualification result and failure an owned path.

Routing precedence from restrictions and relationships through availability

Condition	Destination	Owner	Response target	Fallback	Proof to inspect

[] Existing owner [] Eligible pool [] All away [] Unassigned [] Failed write [] Duplicate event

6. Lead qualification test pack

Write expected business outcomes before execution.

Case and input	Expected score / confidence	Expected route and owner	Evidence to inspect	Pass / fail / not tested

☐ Positive ☐ Negative ☐ Incomplete ☐ Duplicate ☐ Stale ☐ Ambiguous ☐ Existing owner ☐ All away ☐ Failure ☐ Held-back real case

Disagreements, root causes, repairs, and rerun results

7. Measures, ownership, and review

Set baselines, calculations, owners, change control and the next decision.

Measure	Population and period	Source and calculation	Baseline	Owner

Responsibility	Named owner	Review cadence	Approval or pause authority

Continue, revise, narrow, pause, or stop decision and evidence

8. Capstone rubric

Grade the complete system plan before technical discovery.

Criterion	0: missing	1: partial	2: decision-ready	Score

Criteria: ICP evidence; scoring rules; MQL and SQL contract; responsibility boundary; routing and fallbacks; test pack; measures and ownership.

Passing standard: 12 of 14 points with no zero. A passing planner supports the next decision; it does not authorize production deployment.

Final decision, approvers, conditions, and next review date