

SPEED TO LEAD

The Marketing-to-Sales Handoff and SLA Cookbook

Lead definitions, a speed-to-lead SLA, routing rules, rejection reasons, a weekly review and the CRM fields and reports that make the handoff measurable, with HubSpot examples.

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01

Write down what a lead is, and what it is not

Handoff arguments are usually definition arguments. Marketing counts a form fill as a lead; sales counts a lead as someone who might buy this quarter. Both are reasonable, and the gap between them is where leads wait, get ignored or get passed back. The cure is a short document that names each stage, says what must be true for a record to enter it, who owns it, and what moves it on. Most CRMs give you a lifecycle stage property for this. HubSpot's default lifecycle stages include subscriber, lead, marketing qualified lead, sales qualified lead, opportunity and customer, and its knowledge base explains how to use them and how stage changes are tracked. You can use the defaults, rename them, or add your own, but whichever you choose, the definitions have to be shared.

Resist the temptation to build a long ladder of stages. Each stage you add needs an owner, entry criteria and a reason why a record would leave it. A common minimum is four: a raw contact who has shown some interest, a marketing-qualified lead that meets the agreed criteria, a sales-accepted lead that a rep has agreed to work, and an opportunity. The specific names matter less than whether everyone uses them the same way. Where a model gives a lead a numeric score, treat the score as an input to the criteria rather than the criteria themselves, and know what the score is built from. HubSpot documents how its scoring tool works and how score history can be reviewed; the same principle applies in any system.

Two types of entry deserve separate rules. Contacts who ask to talk to sales (a demo request, a pricing enquiry, a contact form) are signalling intent directly and usually go straight to a rep. Contacts who qualify by engagement (content downloads, repeat visits, event attendance) are a weaker signal and need criteria that both teams have looked at. Mixing the two under one definition is a common reason sales ignore a whole queue.

Stage	Entry criteria (write your own)	Owner	Leaves when
New lead	Contact record created with a valid email and a known source	Marketing	Meets the qualification criteria, or is recycled or disqualified
Marketing qualified	Meets agreed fit and engagement criteria, or made a direct sales request	Marketing hands over; sales owns the follow-up	A rep accepts or rejects within the SLA
Sales accepted	A rep has reviewed the record and agrees to work it	Sales	Rep creates an opportunity, or returns it with a reason
Opportunity	A qualified deal with a defined next step has been created	Sales	Won, lost or disqualified
Recycled	Not ready or not a fit now; reason recorded	Marketing	Re-enters the lead stage on defined new activity

02

The SLA: two-sided, specific and written once

A service-level agreement between marketing and sales is a list of commitments each side can be measured against. It should not read like a policy. Marketing commits to a lead definition, a volume range if one has been agreed, complete required fields, and a routing path that works. Sales commits to a first-response time, a number of contact attempts, and recording an outcome within a stated period. The commitment on the sales side that gets the most attention is speed to first response, and it is worth setting the target on evidence from your own data rather than a number from the internet.

On what the target should be: you will see published figures linking faster response to higher contact and qualification rates, but we have not cited one here: such figures come from particular data sets and periods, and we do not treat them as a rule for your business. Our recommendation is to pick an initial target that your team can plausibly meet in working hours, such as a first response within one business hour for direct sales requests, measure how often you meet it, and tighten it once you are meeting it consistently. Treat that number as a starting point to adjust, not a benchmark. Count the clock in business hours unless you have out-of-hours cover, and say which.

An SLA with no consequence is a wish. The consequence need not be punitive; it needs to be automatic. If a lead has no activity from its owner within the window, the CRM should notify the owner, then notify the manager, then reassign. That escalation is easy to build in a workflow tool. HubSpot's workflows can enrol records on triggers and assign or rotate owners; its knowledge base documents how to rotate or assign record owners within workflows. The principle holds in other CRMs: put the clock in the system so that no one has to remember to watch it.

- Marketing: definition, field completeness, routing, and agreed lead criteria
- Sales: first response within the agreed time, a set number of attempts, and an outcome recorded in the CRM
- Both: a named person who can change the rules, and a date to review them
- Escalation: notify the owner, then the manager, then reassign, all by automation

Count the clock in business hours unless you have out-of-hours cover, and say which.

03

Routing: pick the rule you can explain in a sentence

Routing assigns each qualified lead to an owner. The simplest rules are round robin across an available group of reps, territory (by region, country or state), account ownership (the lead goes to the rep who already owns the company), and segment (by company size or industry). Most teams need a combination, applied in a fixed order: first existing account owner, then territory, then segment, then round robin as the fallback. Each rule should be explainable to a rep in one sentence. If it needs a diagram to understand, it will be applied inconsistently and challenged constantly.

Do not forget the edge cases, because they are where leads are lost. Decide what happens when the rep is on leave, when a lead matches no territory, when a record is a duplicate of an existing contact, when the company is an existing customer, and when the contact is a partner or competitor. A catch-all queue with a named owner, checked daily, is better than silently assigning those leads to an inactive user. HubSpot's documentation on deduplication of records and on assigning and rotating owners covers the mechanics in that platform; whichever tool you use, test the routing with sample records for every branch before launch.

Put the routing logic in one place. When it lives partly in a form, partly in a workflow and partly in a spreadsheet someone maintains, it drifts. The rules sheet that comes with this cookbook is meant to be the one reference everyone edits first, and then mirrors into the CRM.

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04

Rejection reasons and the weekly review

When sales rejects a lead, the CRM should require a reason from a short list. Free text produces vague answers like "not interested" or "bad lead", which cannot be counted or acted on. A useful list is short, mutually exclusive and tied to something marketing can change: not a fit (company size, industry or geography), no budget or authority identified, no need or wrong product, duplicate or existing customer, bad data (wrong or missing contact details), no response after the required attempts, and not ready now (recycle). Add an "other" option with a mandatory note, and review that note field regularly, because patterns in it signal a missing category.

The weekly review is where the SLA turns into improvement. For the first quarter, hold a short meeting with a fixed agenda, owned by revenue operations or the marketing lead. Look at leads that missed the response window and why; look at the counts of rejection by reason and source; look at accepted leads that did not progress; and ask what single rule or field to change this week. Record that decision. A weekly review that generates no change after a few sessions has either solved the problem or become a

status update, and the group should say which. Once the numbers settle, move to a monthly rhythm.

Keep the conversation about the process rather than about people. "Sales ignored the leads" and "marketing sends junk" are both unhelpful as findings. "Thirty percent of rejections this week were for geography" (illustrative) is a finding, and it points to a form field, a targeting change or a routing rule.

- Required rejection reason from a fixed picklist, with a mandatory note on "other"
- Weekly: SLA misses, rejections by reason and source, stalled accepted leads, one rule change
- Same data for both teams, in the same dashboard
- Move to a monthly review once the numbers are stable

For the first quarter, hold a short meeting with a fixed agenda, owned by revenue operations or the marketing lead.

05

CRM fields and reports that make it measurable

You can only enforce an SLA you can measure, and measuring needs timestamps. The minimum set is: the lead source, the time the record became marketing qualified, the time it was assigned, the time of first logged sales activity, the time the rep accepted or rejected it, the rejection reason, and the time an opportunity was created. HubSpot provides default contact properties and lets you create custom ones; its documentation on creating and editing properties and on default contact properties explains what exists and how to add your own. Lifecycle stage changes also record dates that you can use for stage-to-stage timing, per HubSpot's lifecycle stage guidance.

From those fields you can build a small set of reports. Time from qualified to first activity, by owner and by source. Percentage of leads meeting the SLA. Accept, reject and no-response rates by source. Rejection reasons over time. Stage-to-stage conversion and time-in-stage. Open leads breaching the SLA right now, which belongs on a live view rather than a monthly slide. HubSpot documents building custom reports and its sales analytics reports; other CRMs have equivalents. Where possible, use the CRM's own report builder and not a hand-built spreadsheet, so that the numbers are the same for everyone.

Check data quality before you trust the numbers. Reps who log activity in a separate tool, email that is not synced to the CRM, or leads created by integrations without the right source will all distort the response-time figures. Audit a sample of records every month against what actually happened. If the data is not trustworthy, fix that before you use it to judge a person or a campaign.

Field or report	Why it matters	Notes
Lead source (original and latest)	Lets you compare quality and speed by channel	Use picklists; agree values with marketing
Timestamps: qualified, assigned, first activity, accepted	The basis for every SLA calculation	Make sure activity logging is automatic where possible
Rejection reason	Turns opinions into counts	Required on rejection; picklist
Owner and team	Needed for routing audits and escalations	Include a catch-all owner for unmatched leads
SLA breach flag or open-breach view	Prompts action while the lead is still live	Drive from workflow or a filtered list

06

Implementation checklist

Run the steps in order. The gates are things you can check in the CRM or in a meeting record, not things you believe you have done.

Step	Owner	Gate to pass before moving on
Write the stage definitions and entry criteria	Revenue operations with marketing and sales leads	One page, signed off by both team leads, with each stage owned and defined
Draft the SLA for both sides	Marketing lead and sales lead	Commitments, response time, attempts, outcome recording and escalation all written, with a review date
Create or confirm CRM fields and timestamps	CRM administrator	Each field exists, is required where needed, and a test record fills them correctly
Build routing rules, including edge cases	CRM administrator	Sample records for every branch land with the right owner, including duplicates and unmatched leads
Build escalation automation	CRM administrator	A test lead left untouched notifies the owner, then the manager, then reassigns at the stated times
Add the rejection reason picklist and make it required	CRM administrator with sales lead	A rep cannot reject a lead without selecting a reason
Build the reports and a shared dashboard	Revenue operations	Both teams can see SLA compliance, rejections by reason and open breaches in one view

Step	Owner	Gate to pass before moving on
Hold the weekly review for the first quarter	Revenue operations	Every meeting ends with one recorded change, or an explicit decision that none is needed

Key Takeaways

- A handoff fails when marketing and sales mean different things by "lead". Write the definition down with entry criteria, and have both teams sign it.
- An SLA binds both sides: marketing commits to lead quality and data completeness, sales commits to a response time and a recorded outcome.
- Every lead gets exactly one owner and one next step within the SLA window, or it escalates automatically to someone who can act.
- A rejected lead must carry a reason from a short fixed list. Free text gives you opinions; a picklist gives you something to count.
- Review the handoff weekly for the first quarter. The review should change a rule or a field, otherwise it is a status meeting.

Sources

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