The B2B Lead Management Playbook

This lead management playbook gives B2B startups a fast, simple, and proven framework to build a clean, consistent, and scalable lead management process.

It applies to HubSpot lead management, Salesforce lead management, and hybrid RevOps environments.

How to Use This Playbook

- Follow the six steps in order — each step is a core pillar of modern B2B lead management.
- Apply the actions directly inside HubSpot, Salesforce, or your CRM.
- Use the red flags to identify immediate gaps in your lead management process.
- When you complete all steps, you will have a fully operational lead lifecycle management system.

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Define Your Lead Stages & Ownership Structure

01

Actions

- Create standardised lead stages: New → Attempting Contact → Engaged → Marketing Qualified Lead (MQL) → Sales Qualified Lead (SQL) → Disqualified.
- Document a universal definition for MQL → SQL in your lead qualification process.
- Assign clear ownership: Marketing, SDR, AE, RevOps.
- Add required CRM fields: Lead Status, Lifecycle Stage, Lead Source, Qualification Notes.

02

Red Flags

- Lead stages mean different things to different reps.
- SQLs created manually with no qualification criteria.
- Inconsistent lifecycle stages in HubSpot or Salesforce

Standardise Lead Capture & Lead Source Attribution

Actions

- Connect every form, ad platform, chatbot, and event source directly to your CRM.
- Add hidden UTM fields to all lead capture forms.
- Standardise Lead Source and campaign naming (critical for Salesforce & HubSpot reporting).
- Prevent duplicates using native CRM duplicate rules.

Red Flags

- "Unknown" source >5% of leads.
- Manual CSV uploads.
- UTM data missing from paid channels.

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Implement Lead Qualification & Lead Scoring

01

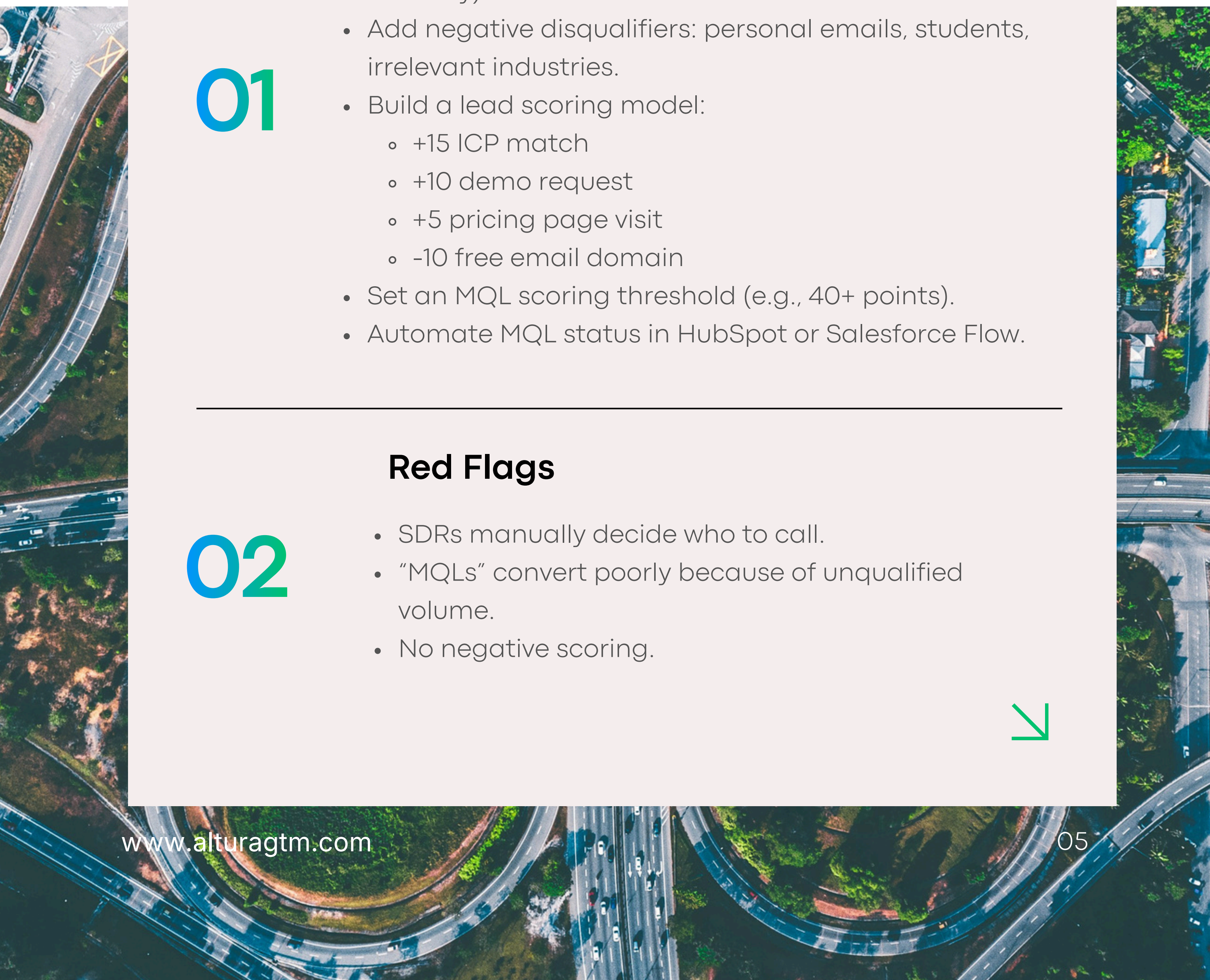
Actions

- Define ICP criteria (industry, company size, region, job seniority).
- Add negative disqualifiers: personal emails, students, irrelevant industries.
- Build a lead scoring model:
  - +15 ICP match
  - +10 demo request
  - +5 pricing page visit
  - -10 free email domain
- Set an MQL scoring threshold (e.g., 40+ points).
- Automate MQL status in HubSpot or Salesforce Flow.

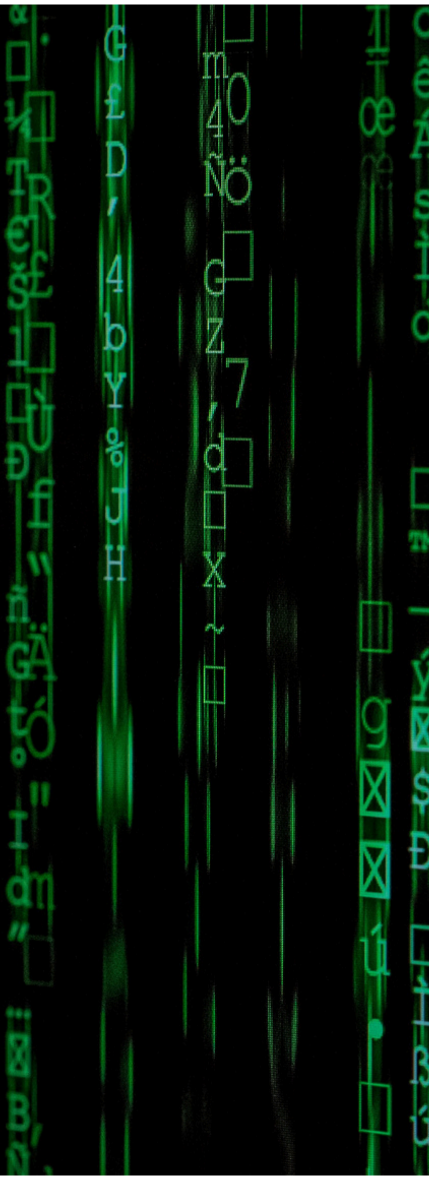
02

Red Flags

- SDRs manually decide who to call.
- “MQLs” convert poorly because of unqualified volume.
- No negative scoring.



Automate Lead Routing & Assignment



Actions

- Choose routing logic: round-robin, territory-based, segment-based, or product-based.
- Use HubSpot workflows or Salesforce Flow to automate lead assignment.
- Add fallback assignment rules to prevent “lead black holes.”
- Test routing by simulating inbound leads for each segment.

Red Flags

- Leads assigned manually or hours late.
- SDRs cherry-pick the best leads.
- “No owner” exists in CRM.

Enforce Speed-to-Lead & Lead Follow-Up SLAs

Actions

- Set an SLA: first touch within 10–30 minutes for all inbound leads.
- Trigger instant Slack or email notifications on lead assignment.
- Escalate after 2 hours with no activity.
- Reassign after 24 hours with no activity.
- Track time-to-first-touch and SLA breaches.

Red Flags

- Slow follow-up times.
- Leads contacted next day.
- No SLA reporting.

> Speed-to-lead is a core KPI of B2B lead management and dramatically impacts conversion rates.

Standardise Handoffs & Build Lead Management Reporting

Actions

- When a lead becomes SQL, auto-create an Opportunity/Deal.
- Require AEs to “Accept” or “Reject” SQLs.
- Enforce required fields for new opportunities.
- Build dashboards:
    - Lead-to-SQL conversion rate
    - SQL-to-opportunity rate
    - Lead leakage
    - SLA compliance
    - Best-performing lead sources

Red Flags

- Poor SQL acceptance rates
- AEs not accepting/rejecting leads
- Deals created inconsistently
- Missing required fields
- No dashboards for conversion

Contact Information

Altura GTM is a RevOps consultancy that helps B2B startups build predictable, scalable revenue engines. We specialise in CRM implementations, lead management systems, and GTM process optimisation across HubSpot and Salesforce. Our approach is simple: clean data, clear processes, and revenue operations that grow with you.

If you want support implementing your lead management process or strengthening your CRM foundations, reach out at **info@alturagtm.com** to book a call with the team.