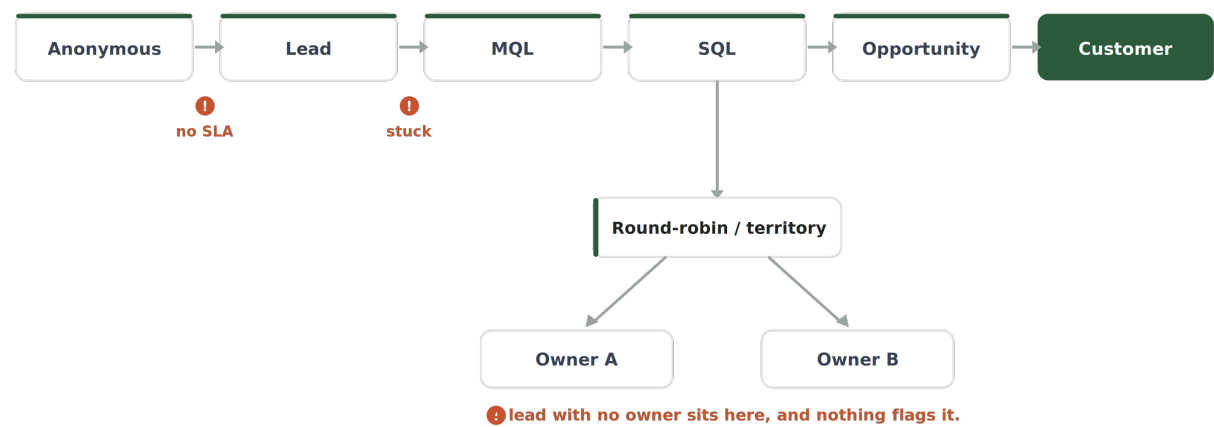


Lifecycle and Routing Audit

TRIAGE Find where leads leak.

LIFECYCLE AND ROUTING
Find where leads leak



The third fix, and the one that recovers pipeline nobody logged as lost. A lead with no path and no owner sits, and nothing tells you. Walk the real path, not the diagram on the wall.

Walk the path. One row per lead type. Write the stages, the owner at each, and where it leaks.

Lead type	Path (stages)	Owner at each stage	Leak point
Inbound			
Demo request			
Content			
Event			
Partner			

Find the leaks.

- ☐ Every lead type has a defined path and a named owner at every stage. No orphans.
- ☐ There is an SLA on follow-up, and it is met.
- ☐ Nothing sits unrouted or unworked.

- ☐ Leads do not fall out between marketing and sales.

Routing and scoring.

- ☐ Assignment rules are current. Leads reach a real owner, not someone who left.
- ☐ Scoring reflects how the business defines a good lead today, re-derived from how sales qualifies now.
- ☐ Good leads are not buried, and weak leads are not pushed as hot.

Done when every lead type has a path and an owner, nothing sits unrouted or falls out, routing matches how the team is organized, scoring is current, and you could explain end to end what happens from form fill to closed deal.