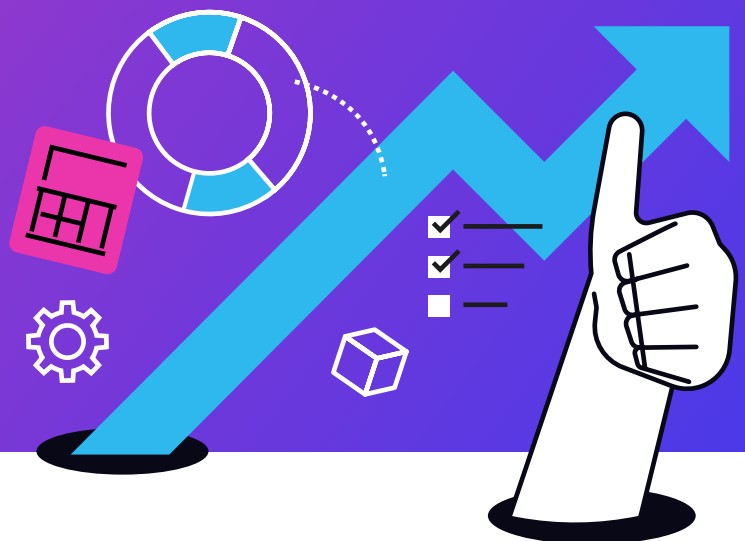


SLED MARKETING MASTERY SERIES

From Smart Lead to Sales Opportunity

A simple framework for turning engagement signals into closed deals



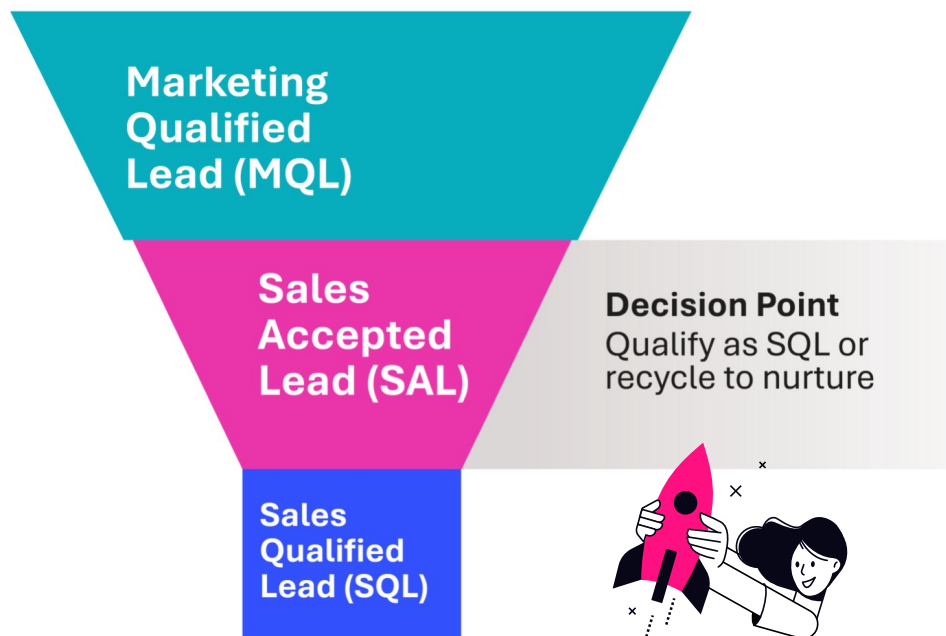
From Smart Lead to Sales Opportunity

This worksheet is your streamlined playbook for turning your leads (especially e.Republic Smart Leads, with their context and behavioral data) into real SLED sales opportunities.

The first step isn't complicated—but it's critical: **know what you can track today**. From there, you'll decide whether to use **lead scoring** (assigning points to actions) or **milestones** (engagement markers like “downloaded a cybersecurity guide + attended a webinar”) to determine when someone is ready to be a Marketing Qualified Lead (MQL).

This guide will help you:

1. Take inventory of what's trackable now.
2. Decide whether to score leads or use milestones to move them through the funnel (Lead → MQL → SAL → SQL).
3. Define and enforce clear marketing-to-sales handoff rules.
4. Measure and improve continuously.



Section 1: Take Inventory of What You Can Track

Before you can qualify leads, you need to know what signals are available to you. Start by making a list of the engagement data you can capture today. Where to look for signals:

- **CRM & Marketing Automation Tools:** email opens, gated content downloads, form fills, webinar registrations/attendance, repeat web visits.
- **Sales Team Inputs:** call notes, meeting outcomes, event/tradeshow attendance.
- **Third-Party Data:** technographics, budget signals, intent data from vendors.

These signals fall into three Buyer Intent Signal types:



Explicit Intent

(clear buying signals):
Direct actions or contact that clearly signal interest or buying intent.

- Demo requests or contact form submissions
- Webinar registration and/or attendance
- Download of a high-value asset (i.e. RFP guide, implementation playbook)



Implicit Intent

(warming behavior):
Engagement behaviors that suggest curiosity or warming interest, but aren't yet a buying signal.

- Email opens or clicks
- Website visits to product/solution pages or pricing pages
- Multiple content downloads or views within 30 days



Inferred Intent

(context-based indicators):
Broader context clues you can piece together from patterns, timing, or outside data sources.

- Firmographics that match your Ideal Client Profile (i.e. agency size, type, geography)
- Engagement around specific fiscal deadlines or funding announcements
- Third-party intent data showing research spikes on a given topic
- Social engagement patterns (i.e. repeated clicks on posts about a specific policy trend)

Catalogue signals you can track today under each intent type. That inventory is your baseline.

Tip: You don't need to capture everything at once. Even a handful of explicit and implicit signals, consistently tracked, is enough to start building reliable MQL criteria. Consistency matters more than sophistication.

Section 2: Decide: Lead Scoring or Milestones

Assess your inventory of trackable actions and make a decision if you can automate using lead scoring, or if you need to do something less complex or manual using milestones:

- **Lead Scoring:** Best if you can consistently track multiple engagement behaviors across the funnel (awareness, consideration, and conversion). Use the scoring grid in this worksheet to weight actions by importance and intent.
- **Milestones:** If your tracking is light or siloed, set clear milestones instead. Example: A persona-qualified lead that downloads two gated assets in a quarter + attends a webinar = ready for sales outreach.

***Tip:** The key is consistency. Define the rules, write them down, garner approval between Sales and Marketing, and apply them across every lead.*



Section 3: Marketing-to-Sales Handoff Rules

Once a lead hits your scoring threshold or milestone:

- **Pass to Sales immediately** with a complete lead package that includes:
 - » Contact name, title, agency, and department
 - » Email and phone (if available)
 - » Engagement history (downloads, webinar attendance, site visits, ad clicks)
 - » Behavioral insights (topics of interest, recency/frequency of engagement)
 - » Any suggested next steps
 - » Lead score
- **Sales must respond within 24–48 business hours** (non-negotiable, speed matters).
- If Sales rejects the lead, they must explain why (wrong persona, no budget, too early). That feedback is gold—it fuels smarter targeting and stronger nurturing in the future.
- **Leads sent back should re-enter nurture** with context, not disappear into a black hole.



***Tip:** You've already invested significant amounts of time and money to capture this lead's name, role, and engagement history. Don't waste that investment by giving up too quickly. SLED buying cycles are long—often spanning months or fiscal years—and prospects can enter or exit the funnel depending on budget cycles, mandates, and shifting priorities. A "rejected" lead isn't dead; it just needs more time. Keep nurturing, because walking away is essentially throwing away the effort (and budget) you've already spent.*

Section 4: Lead Scoring Framework (If You're Ready)

Design a scoring model that mirrors the path a contact takes as they move through your marketing funnel toward sales readiness, using the actions you can track. The goal is to move a contact into Marketing Qualified Lead (MQL) status — meaning the lead meets marketing's agreed criteria for being ready to pass along to sales. From there, if sales reviews and agrees the lead is worth pursuing, it becomes a Sales Accepted Lead (SAL) — typically confirmed through initial vetting or discovery as having a real opportunity.

Next, decide how each activity should be treated:

- **Positive actions** → add points (signals of interest or buying intent)
- **Neutral actions** → no points (informational but not predictive)
- **Negative actions** → deduct points (signals of low fit or disengagement)

Assign point values based on how closely each activity correlates with closed deals. Then validate your model with your sales and marketing team: list it, score it, test it, refine it, and roll it out.

Positive Brand Actions

Assign points for activities you can track based on funnel stage—lighter for early awareness, heavier for conversion-level intent. These activities assume the contact is aligned to your desired ICP and Personas, if not, their score would be deducted from below.

Awareness (light interest / early engagement so light points ranging from 1 – 10 each)

Email open +5 POINTS	Newsletter sign-up +10 POINTS	Social Media Post Click +1 POINTS	View of Blog +5 POINTS	Website Ad Click +10 POINTS	Page Views of General Info +5 POINTS
--------------------------------	---	---	----------------------------------	---------------------------------------	--

Consideration (stronger intent / topic-specific engagement so increased point values ranging from 10 - 20 each)

Download Gated Content +15 POINTS	Multiple Content Views on Same Topic Tags +10 POINTS	Product / Solution Page Click +15 POINTS	On-Demand Video Watched +20 POINTS	Interactive Tool Completion (i.e. Calculator, Quiz, etc.) +10 POINTS	Multiple Website Visits within 30 Days +15 POINTS
---	--	--	--	--	---

Conversion (high buying intent with high points ranging from 20 - 30)

Webinar Registration and/or Attendance +30 POINTS	Pricing Page Visit or RFP Request +30 POINTS	Case Study or Implementation Guide Download +20 POINTS	Contact Form Submission +30 POINTS	Demo Request +30 POINTS	Direct Reply to Nurture Email +20 POINTS
---	--	--	--	-----------------------------------	--

Negative Brand Actions

Deduct points for activities you can track for low-fit, no-fit, or harmful actions. These deductions are applicable to all buying stages. Points assigned should range from -1 to -100

Out of Target Geography -100 POINTS (get them out of nurture)	Off-Persona Job Titles Department Agency Size Agency Type -20 POINTS (reduce individual relevance but retains organization in case they are an unknown influencer)	Incorrect Tech Stack -20 POINTS	Known Competitors Downloading Content -100 POINTS (get them out of nurture)
No Engagement in #X Weeks -20 POINTS (losing interest so lower your expectations and don't bother them too much, give them time to digest or re-engage)	Unsubscribe from Email -100 POINTS (may still be interested but will let you know, until then you have to leave them alone)	Negative Social Media Engagement (complaint, negative comments) -25 POINTS (1 comment alone may not be telling but multiple will get them off your radar)	

Neutral Brand Actions

Make a list of things you do not want to score even though you can track them—meaning they have no impact on lead movement. These actions are applicable to all parts of the buying stages and require no warming or sales outreach.

Existing Client Visits 0 POINTS	Accidental Clicks / Bounces (based on short dwell time) 0 POINTS	General Press Release (no other engagement) 0 POINTS
--	---	---

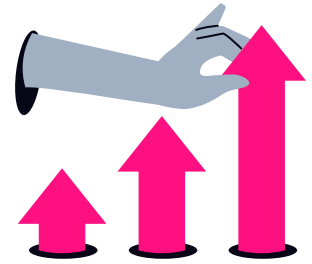
Tip: You won't get it perfect out of the gate—and that's ok. Start simple, gather feedback from Sales, and refine as you go. Progress beats perfection.

Section 5: Measure and Improve

SLED buying cycles are long, but that's exactly why you need to keep tuning.

- Track performance of both nurture and sales outreach (open rates, CTR, webinar attendance, lead-to-opportunity ratios).
- Compare which touches drive the most progression.
- Spot where leads stall and adjust content or cadence.
- Share findings between Marketing and Sales—alignment makes the whole system stronger.

Tip: Even small optimizations compound over time in the long SLED cycle. Every tweak makes your pipeline healthier.



Final Thought:

In the SLED market, opportunity doesn't happen by accident—it's earned through consistent, informed engagement. Start by knowing what you can measure today, decide on scoring or milestones, enforce clear handoff rules, and keep improving quarter after quarter. That's how leads become a valuable pipeline.

Ready to put your strategy into motion or need help?

For more information, contact marketing@erepublic.com or your account representative.