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Start Smart:
The Power of Good Lead Qualification

Sugar Sell Foundations Webinar Series

PRESENTER
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DATE
December 9, 2025

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Sugar Sell Foundations Webinar Series

Purpose: Reconnect teams with the core principles of effective selling and customer management using Sugar Sell.

Focus: Each session highlights one foundational practice—qualification, automation, dashboards, mobile usage—and how to master it with Sugar.

Audience: Sales, marketing, and service leaders who want to reinforce best practices and boost adoption across their teams.

Format: Short, focused sessions blending strategy, real-world examples, and live demos in Sugar.

Approach: Practical, no-fluff conversations that show how "doing the basics brilliantly" leads to measurable business impact.

Outcome: Equip you to run a tighter, more predictable sales operation and make better data-driven decisions.

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Series Themes: 8-Week Plan

1. December 9   **Start Smart:** The Power of Good Lead Qualification
2. December 16   **From Chaos to Clarity**: Opportunity Management that Works
3. January 6   **The Sales Pulse:** Managing through Activities
4. January 13   **Sugar on the Go: Mobile Settings Made Easy**
5. January 20   **Less Busywork, More Selling:** Automating Your Sugar Workflows
6. January 27   **Sales Mastery:** Driving Growth with Sugar
7. February 3   **Seeing Success**: Building Actionable Dashboards in Sugar
8. February 10   **From Data to Direction**: Mastering Reports in SugarCRM

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Quick Poll:
Common Pain Points

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Agenda

Why Lead Qualification Matters

What Good Looks Like

Brining It to Life in Sugar

Operationalizing Success

Recap & Key Takeaways

Q&A & Closing

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Why Lead Qualification Matters

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The "Garbage In, Garbage Out" Principle: Why Bad Data = Bad Deals

Reminds us that poor data quality doesn't just clutter the system — it actively erodes performance and trust.

- **Inaccurate or outdated data misleads your team**
- **Bad data breaks automation**
- **Customer experience suffers**
- **Strategic impact:** bad data = bad decisions

Inconsistent or Outdated Data
Breaks Automation
Customer Experience Suffers
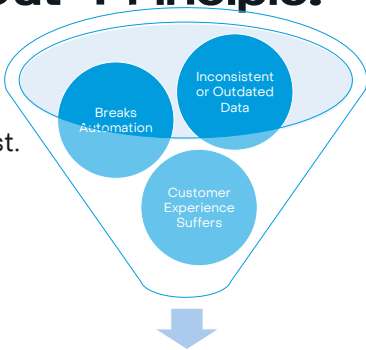
Strategic Business Impact

BOTTOM LINE

Clean, consistent data **is not a back-office chore** — it's the **foundation** of credibility, efficiency, and revenue growth. Sugar's value lies in making it easier to **capture**, **automate**, and **act on high-quality data** — because good data doesn't just inform better decisions, it creates better deals.

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Common Pitfalls

Inconsistent Criteria

Incomplete Data Capture
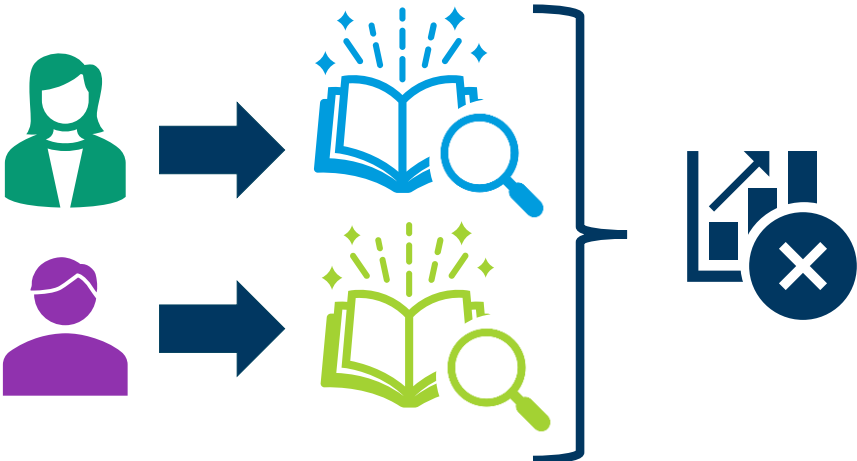
Lack of Shared Definition of a Qualified Lead

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Example Scenario

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What Good Looks Like:

Framework & Best Practices

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Overview of Sales Lead Qualification Frameworks

Frameworks	Key Steps
BANT	Budget, Authority, Need, Timeline
CHAMP	Challenge, Authority Money, Prioritization
MEDDIC	Metrics, Economic Buyer, Decision Criteria, Decision Process, Identify Pain, Champion
SPICED	Situation, Pain, Impact, Critical Event, and Decision.
Gap Selling	Uncover problems, get to the root cause, understand the buyer's future, identify purchase barriers, and then offer a solution to close the gap.
SNAP Selling	Simple, iNvaluable, Aligned, and Principal
Sandler	Includes steps like Bonding and Rapport, Up-front Contracts, and Pain, Budget, and Decision.

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Quick Poll: Which Qualification Framework Does Your Team Use?

BANT	
CHAMP	
MEDDIC	
SPICED	
Gap Selling	
SNAP Selling	
Sandler	
Other	

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Alignment Between Marketing & Sales

1. **Lead Qualification Definition**

- MQL (Marketing Qualified) to SQL (Sales Qualified)
- Shared Definition
- Reduces friction – Sales knows what to expect, Marketing knows what to deliver
- Example:
  - MQL = Completed Demo Request + Fits ICP Criteria
  - SQL = Contracted, Confirmed Budget and timeline

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Alignment Between Marketing & Sales

1. Lead Qualification Definition
2. **Ideal Customer Profile (ICP)**

- Define jointly the firmographic, technographic, and behavioral attributes of your 'ideal" customer
- Use CRM data to continuously validate and refine the profile.
- Ensure Marketing targets the right audience and Sales pursues the right opportunities.

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Alignment Between Marketing & Sales

1. Lead Qualification Definition
2. Ideal Customer Profile (ICP)
3. **Lead Scoring Model**

- Align on scoring factors (demographics, engagement behavior, intent signals).
- Regularly review thresholds together—what score truly signals readiness for Sales follow-up?
- Prevents premature handoffs and lost opportunities.
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Alignment Between Marketing & Sales

1. Lead Qualification Definition
2. Ideal Customer Profile (ICP)
3. Lead Scoring Model
4. **Handoff and Feedback Loops**

- Clearly define **when and how** leads move from Marketing to Sales
- Create a feedback mechanism: Sales marks disposition (qualified, not ready, disqualified), Marketing refines targeting
- Reinforces accountability on both sides.

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Alignment Between Marketing & Sales

1. Lead Qualification Definition
2. Ideal Customer Profile (ICP)
3. Lead Scoring Model
4. Handoff and Feedback Loops
5. **Shared KPIs and Success Metrics**

- Track the same outcomes: conversion rates, pipeline contribution, revenue attribution.
- Avoid "vanity metrics" on either side (e.g., leads generated vs. deals closed).
- A single source of truth ensures collaboration, not competition.

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Alignment Between Marketing & Sales

1. Lead Qualification Definition
2. Ideal Customer Profile (ICP)
3. Lead Scoring Model
4. Handoff
5. S
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..., not competition.

Why Shared Definition Are Critical
Prevents "Garbage in, Garbage Out"
Strengthens Forecast Accuracy
Builds Organizational Trust

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Lead Score

What Is Lead Scoring?

• Methodology used to **rank prospects** based on the **perceived value** they represent to the organization
• **Scores** determine which leads sales, partners, or tele-prospecting teams should **prioritize for engagement**

Benefits of Lead Scoring

Increased sales efficiency and effectiveness

Increased marketing effectiveness

Tighter marketing and sales alignment:

Increase in Revenue

Types of Lead Scoring Data

Explicit Data (provided by or about the prospect):

• Company size
• Industry segment
• Job title
• Geographic location

Implicit Data (derived from behavior):

• Website visits
• Whitepaper downloads
• Email opens and clicks

Social Data:

• Presence and activity on social networks

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Lead Scoring Methodology

- **Ideal Customer Profile (ICP):** Uses attributes of known contacts to decide to score (e.g. job title, company size) and allows an organization to focus their efforts on leads that represent their ideal customer.

B2B Software Company (SaaS CRM Vendor)
ICP Focus: Mid-sized businesses (100–500 employees) in technology or manufacturing with active CRM use and budget authority.
Example Scoring Model:

Criteria	Description	Score
Company size	100–500 employees	+10
Industry	Technology or manufacturing	+10
Job title	Director-level or above	+15
Budget	Over $50,000	+10
Engagement	Visited pricing page twice in past week	+10

Total possible score: 55 → *"Highly qualified ICP lead"*
Outcome: Leads scoring above 45 are routed immediately to Sales for follow-up.

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Lead Scoring Methodology

- **Ideal Customer Profile (ICP)**
- **Lamb or Spam:** Most often employed by small businesses who do not have a clear ideal customer profile (ICP), the lamb or spam model consists of filtering out low-quality leads and surfacing high-potential leads.

LAMBS stands for:
L – **Looking**: Actively searching for a solution like yours
A – **Able**: Has budget or authority to make a decision
M – **Motivated**: Has a compelling reason to act now
B – **Believes**: Trusts your company or product can help
S – **Success potential**: Fits your ideal customer profile and is likely to see success

Example: B2B SaaS Lead Scoring with LAMBS

Criteria	Indicator	Score
Looking	Lead downloaded a product comparison guide	+15
Able	Decision-maker or budget holder	+20
Motivated	Expressed urgency ("Need solution by Q1")	+15
Believes	Previously attended a customer case study webinar	+10
Success potential	Fits target industry and company size	+20

Total Possible Score: 80 → *LAMBS (ready for sales engagement)*

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Lead Scoring Methodology

- **Ideal Customer Profile (ICP)**
- **Lamb or Spam:** Most often employed by small businesses who do not have a clear ideal customer profile (ICP), the lamb or spam model consists of filtering out low-quality leads and surfacing high-potential leads.

SPAM stands for:

S	**Spurious**: Not genuinely interested or looking for something else
P	**Penny-pinching**: No budget or unwilling to pay
A	**Apathetic**: No urgency or motivation to change
M	**Missing fit**: Doesn't align with your target market

Example: Scoring a SPAM Lead

Criteria	Indicator	Score Impact
Spurious	Downloaded unrelated whitepaper	–10
Penny-pinching	Requested free trial but no follow-up	–15
Apathetic	No engagement after multiple emails	–10
Missing fit	Company size <10 employees (target is 100–500)	–15

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Lead Scoring Methodology

- **Ideal Customer Profile (ICP)**
- **Lamb or Spam**
- **Rule-Based:** these lead scoring models assign point values to a lead's firmographic & behavioral attributes. Point thresholds are set for a lead to be considered a good or bad fit. (Sugar Market)

Example Lead Journey & Score Calculation (using Sugar Market)

Job title	"VP of IT"	+20
Company	350 employees	+15
Industry	"Technology"	+10
Country	"United States"	+5
Email opened	twice	+4
Email link clicked	once	+5
Visited	pricing page	+10
Downloaded	whitepaper	+8
Web sessions	(>3 in last 90 days) →	+6

Total Score = **83 points**

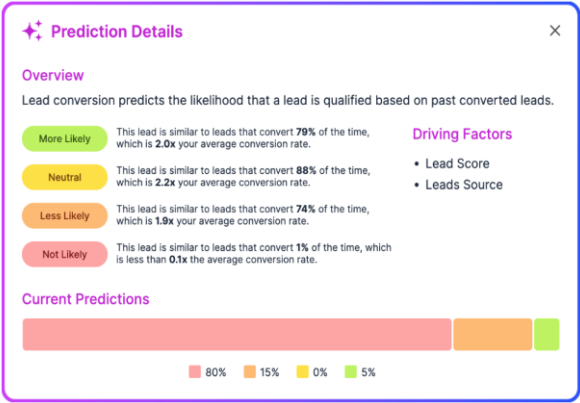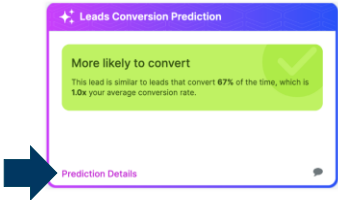Falls into **Hot Lead** (60+) → route to sales for immediate follow-up.

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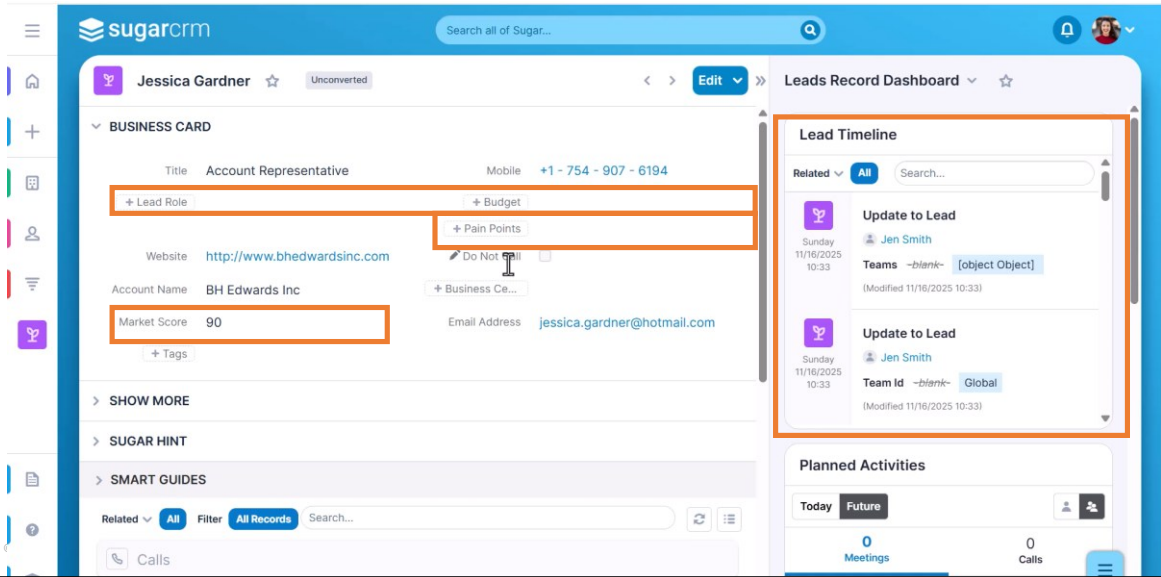
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Checklists or Scorecards

A **Consistency Checklist** ensures that all team members follow the same qualification steps before passing a lead forward.

A **Consistency Scorecard** quantifies those steps using points, making lead handoff measurable and predictable.

Together, they:

- Reduce subjectivity
- Improve MQL → SQL conversion
- Align SDRs and AEs
- Ensure high-quality leads reach sales

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How to Create a Lead Checklist or Scorecard

STEP 1 — Define the Core Areas That Must Be Consistent

Lead qualification usually falls into **5–7 buckets**. For example: **Fit / ICP match, Need or Pain clarity, Authority / Access to Decision Maker, Budget reality, Timeline, Engagement signals, Operational readiness** (data completeness). These will become your checklist categories.

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How to Create a Lead Checklist or Scorecard

STEP 1 — Define the Core Areas That Must Be Consistent	STEP 2 — Turn Each Bucket Into a Checklist

Each category should have 3–5 "yes/no" questions. For Example: for Fit Category: D*o they match our target industry? Is the contact role relevant? Is company size appropriate?*

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How to Create a Lead Checklist or Scorecard

STEP 1 — Define the Core Areas That Must Be Consistent	STEP 2 — Turn Each Bucket Into a Checklist	STEP 3 — Add Weighted Scoring (Scorecard)

A scorecard assigns points, making qualification **more objective**. For example, **Score Weights:** Category Weight Fit 30% Need 25% Authority 15% Budget 10% Timing 10% Engagement 10%

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How to Create a Lead Checklist or Scorecard

| STEP 1 — Define the Core Areas That Must Be Consistent | STEP 2 — Turn Each Bucket Into a Checklist | STEP 3 — Add Weighted Scoring (Scorecard) | STEP 4 — Define Scoring Interpretation |

Score ranges should guide clear actions. For example, Score Range Meaning Action **80–100** Highly qualified Immediate sales follow-up, **60–79** Moderately qualified Nurture + SDR outreach, **40–59** Low qualification Nurture track **0–39** Poor fit No-touch or disqualification. This gives SDRs confidence and AEs consistent expectations.

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How to Create a Lead Checklist or Scorecard

| STEP 1 — Define the Core Areas That Must Be Consistent | STEP 2 — Turn Each Bucket Into a Checklist | STEP 3 — Add Weighted Scoring (Scorecard) | STEP 4 — Define Scoring Interpretation | STEP 5 — Add Data Completeness Standards |

Consistency isn't just about qualification — it's also about **clean CRM data**. Add a section like:
CRM Data Completeness (Required Fields): Correct email format, Phone number present, Industry entered, Company size entered, Lead source tracked correctly. This prevents garbage data from reaching sales.

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How to Create a Lead Checklist or Scorecard

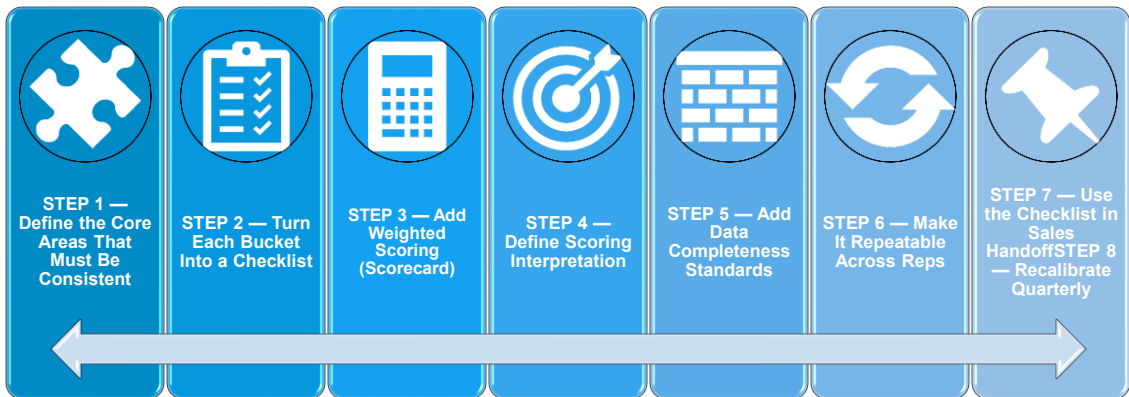| STEP 1 — Define the Core Areas That Must Be Consistent | STEP 2 — Turn Each Bucket Into a Checklist | STEP 3 — Add Weighted Scoring (Scorecard) | STEP 4 — Define Scoring Interpretation | STEP 5 — Add Data Completeness Standards | STEP 6 — Make It Repeatable Across Reps |

To ensure every SDR or marketer follows the same process: **Provide:** A **standard checklist template,** A **scorecard calculator** (can be Excel or built into Sugar), A **one-page cheat sheet,** A **training module** on how to use it Teams should be able to follow it the exact same way every time.
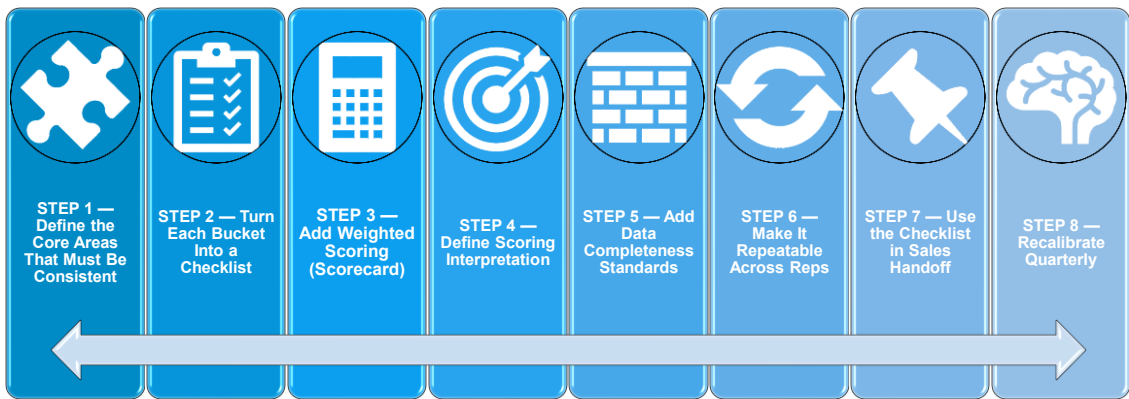
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How to Create a Lead Checklist or Scorecard

| STEP 1 — Define the Core Areas That Must Be Consistent | STEP 2 — Turn Each Bucket Into a Checklist | STEP 3 — Add Weighted Scoring (Scorecard) | STEP 4 — Define Scoring Interpretation | STEP 5 — Add Data Completeness Standards | STEP 6 — Make It Repeatable Across Reps | STEP 7 — Use the Checklist in Sales HandoffSTEP 8 — Recalibrate Quarterly |

Attach the scorecard to: MQL → SQL handoff, SDR → AE internal notes, Opportunity creation. This creates transparency and eliminates the "unqualified lead" handoff problem.

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How to Create a Lead Checklist or Scorecard

| STEP 1 — Define the Core Areas That Must Be Consistent | STEP 2 — Turn Each Bucket Into a Checklist | STEP 3 — Add Weighted Scoring (Scorecard) | STEP 4 — Define Scoring Interpretation | STEP 5 — Add Data Completeness Standards | STEP 6 — Make It Repeatable Across Reps | STEP 7 — Use the Checklist in Sales Handoff | STEP 8 — Recalibrate Quarterly |

Your scoring model should evolve with: Market changes, Product updates, New ICPs, Data insights, Revisit point values every 90 days to keep scoring accurate.
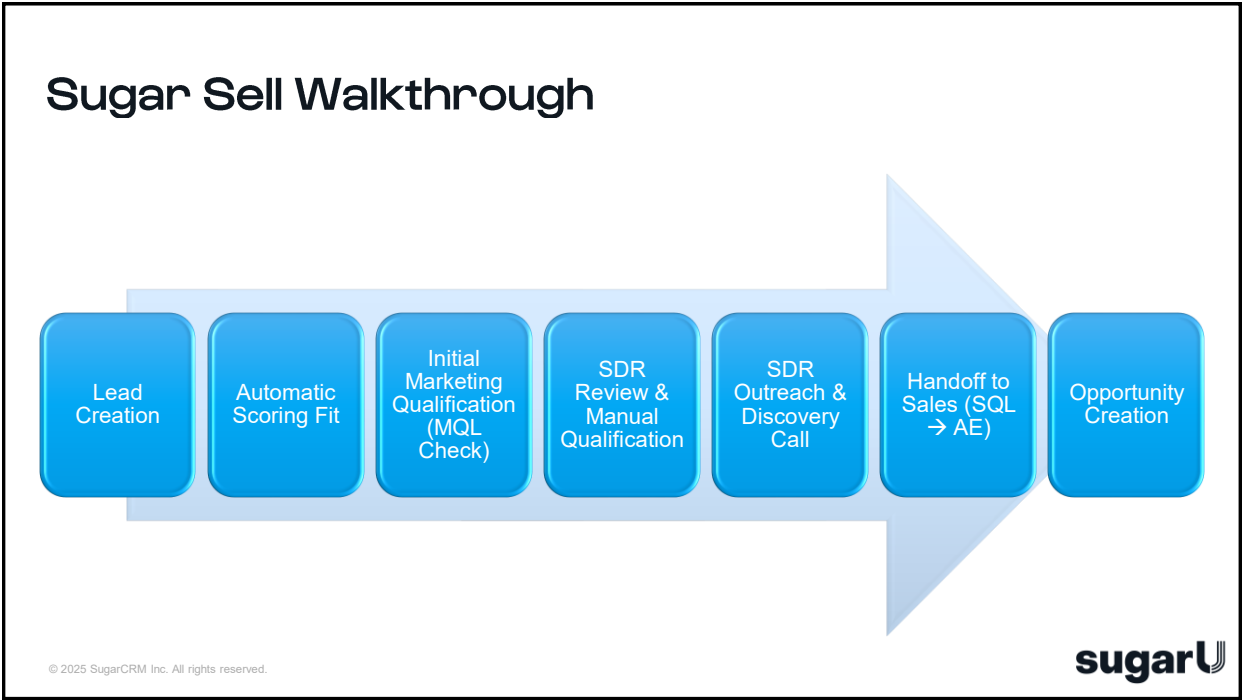
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Bringing It to Life in Sugar

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Sugar Sell Walkthrough

Lead Creation → Automatic Scoring Fit → Initial Marketing Qualification (MQL Check) → SDR Review & Manual Qualification → SDR Outreach & Discovery Call → Handoff to Sales (SQL → AE) → Opportunity Creation

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Demonstrate

Dashboards with Lead Qualification & Conversion

Pro Tip: Quick wins – you can apply what you've learned today!

Create a Lead Qualification Dashboard.

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Integrations & Data Hygiene Tools Enhancing Lead Qualification Accuracy

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Operational Success

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Lead Quality Key Meetings

- Daily Management Cadence Examples
  - Daily Standups
  - Daily Pipeline Mini-Scan
  - Activity Scoreboard Review
- Weekly Management Cadence Examples
  - Weekly 1:1 with Each Rep
  - Weekly Team Meeting
  - Weekly Pipeline Review
  - Weekly Marketing + Sales Sync
- Monthly Management Cadence Examples
  - Monthly Business Review (MBR)
  - Monthly Scoring Model Calibration
  - Monthly Individual Performance Review
  - Monthly Data Hygiene Review

- Quarterly Management Cadence Examples
  - Quarterly Business Review (QBR)
  - Quarterly Training & Skill Workshops
  - Quarterly Scorecard Revision
- Annual Management Cadence Examples
  - Annual Strategy Planning
  - Annual Compensation & Incentive Review
  - Annual Team Performance Evaluation
- Cross-Functional Cadence Examples
  - RevOps + Sales + Marketing Weekly Sync
  - Sales + Product Feedback Loop (Monthly)
  - Support + Sales Monthly Alignment
- Leadership-Level Cadence Examples
  - Executive Weekly Revenue Meeting

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Lead Quality Recommended Reports

- Average Data Completeness Score by User
- Average Lead Score by User (*covered in Follow-up Email*)

Out-of-the-Box Reports: (*covered in Follow-up Email*)

- SQL Leads by Rep
- Leads Conversion Rate
- Q2 MQL Leads by Status
- Count of Leads Unconverted
- Open Leads by User
- Number of Leads Created by Week
- Leads Created by User by Month
- Leads with No Calls, Meetings, Tasks, or Emails

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Recap & Key Takeaways

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Summary – 4 Key Takeaways

1. Why qualification is make-or-break
2. What good looks like
3. How Sugar operationalizes it
4. How to sustain success with metrics and management rhythms

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Q&A
& Closing

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Q & A

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Resources

- SugarU Learning
- Help Articles
- SugarClub
- Upcoming Sessions:

  Week 2 :December 16 – **From Chaos to Clarity**: Opportunity Management that Works

  Week 3: January 6 – **The Sales Pulse:** Managing through Activities

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