

Pipeline Creation 2.0 MQL Refinement, Smart Lead Scoring, and Marketing Attribution

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Pipeline 2.0 - Beginning in 2025

Goal:

Provide an effective way to score and qualify leads so sales can prioritize the best prospects and close deals faster, and marketing can produce *more* viable leads

FROM

- All leads treated equally
- Sales spending time on leads with unknown propensity to buy
- Mixed conversion rates (of MQL to SQL)
- Sales qualifying leads manually
- Low insight into lead source for marketing



TO

- Prioritized leads based on quality and engagement
- Sales focusing on leads most likely to convert
- Consistently high conversion rates
- Sales spend time closing more deals, accelerated sales cycle
- Higher lead attribution, providing insight into highest converting campaigns and tactics

Project Goals, Process, Measure of Success

1. Align marketing and sales on common MQL definition

- **Process:** Socialize plan & implement in Salesforce & Hubspot
- **Measure of success:** MQL->SQL (Discover) % and Total MQL #

2. Introduce measure of demographic/firmographic and behavioral lead quality

- **Process:** Socialize plan & implement in Salesforce & Hubspot
- **Measure of success:** MQL->SQL % by scored attribute and activity

3. Provide greater visibility and intelligence to Sales (pre and post MQL)

- **Process:** Reorganize and extend view of campaign and content engagement data in Salesforce
- **Measure of success:** Sales adoption and prospecting pipeline #'s

4. Capture campaign response data in SFDC to serve as foundation for marketing attribution

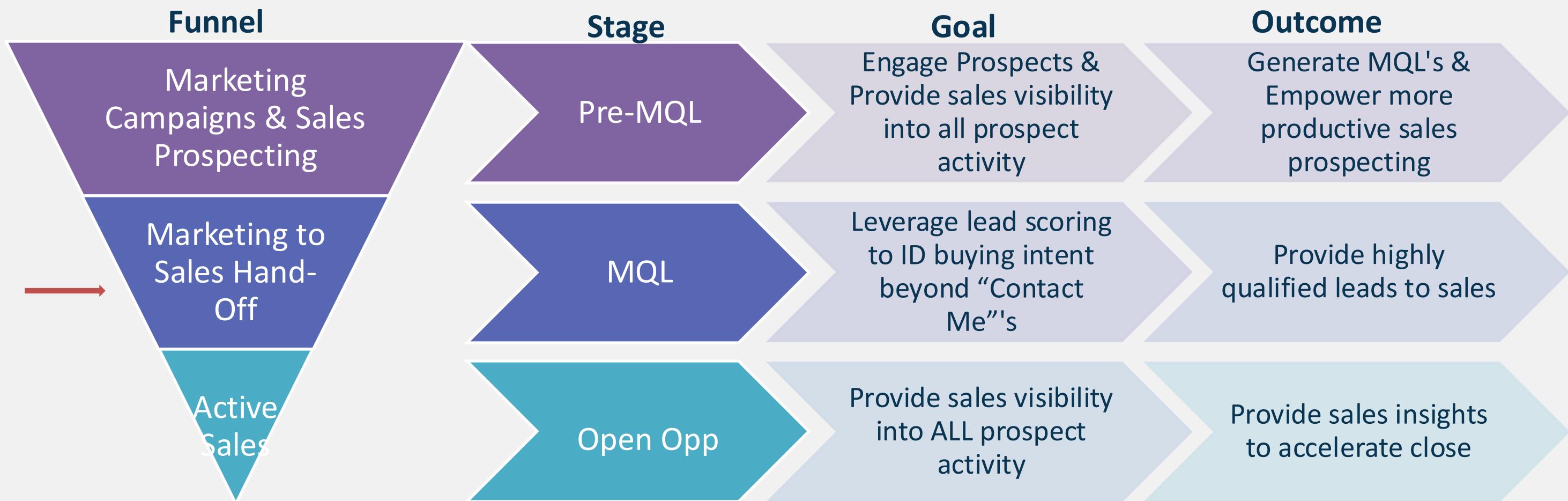
- **Process:** Standardize and consolidate campaign data in Salesforce for all marketing channels
- **Measure of success:** Adequate data for #5 to be insightful and complete

5. Build marketing attribution engine to measure & improve ROI of marketing campaigns

- **Process:** Use internal resources to build custom attribution model calculator
- **Measure of success:** Provides data which drives Improved marketing ROI (Increased MQL #'s)

Vision for Pipeline 2.0: Better Mid-Funnel Orchestration Between Marketing & Sales

#1 Goal is to Increase Sales Productivity



Recommendations and Future State

The background features abstract, glowing blue geometric shapes against a dark blue gradient. A large, translucent blue parallelogram shape is positioned at the bottom right, while other smaller shapes are scattered across the left side.

Improved MQL:

Use Firmographic/Demographic Profiling + Prospect's Activity to Indicate Signs of Buying Intent

A good *MQL* is a lead identified by marketing as meeting ***fit and intent criteria***, requiring sales follow-up under an agreed SLA

Fit and Intent Criteria – what we suggest:

Fit (firmo-/demographic) - *all* of the below

- Private sector contact
- Company email address (non-generic: gmail, etc.)
- Contact or company is US based
- Not on company exclusion list (competitors, etc.)
- Not on job title exclusion list (students, professors, etc.)

Behavioral – *any* of the below

- Requests to speak with sales (bypasses job title, country, email exclusions)
- Has demonstrated moderate level of buying intent (**measured via lead scoring**)

Recommended Lead Scoring:

Will Really Be 2 Scores, and is Useful Beyond MQL Promotion

2 Lead Scoring Fields:

1. Fit Score

- Alphanumeric: A1, A2, A3, B1, etc.
- Letter = Company score
- Number = Person score
- Steady over time



- **Marketing** leverages Fit Score to deliver higher value offers to best prospects
- **Sales** leverages fit and behavior scores for increased prospecting productivity

2. Behavior Score

- Numeric
- Increases with more activity
- Score automatically reduced over time with inactivity



- Multi-tiered threshold based on fit & behaviors used to **promote MQLs**
- MQL queue can be further **prioritized** based on either/both fit and engagement

Measuring Fit and Behavior Separately Allows for Tiered Promotion System

EXAMPLE OF TIERED MQL PROMOTION SYSTEM*

(Behavior Score Needed to MQL)		Company Score (Letter value assigned below)				
Title Score (Number value assigned to the right)	3 = A	2 = B	1 = C	0 = D	<0 = F	
	3 = 1	A1, >19	B1, >19	C1, >19	D1, >19	F1
	2 = 2	A2, >19	B2, >19	C2, >19	D2, >19	F2
	1 = 3	A3, >19	B3, >19	C3, >49	D3, >49	F3
	0 = 4	A4, >19	B4, >19	C4, >49	D4, >49	F4
	<0 = 5	A5	B5	C5	D5	F5

Colors Explained - MQL Definition:

- **Low Bar for MQL** - Any direct meaningful prospect engagement with CL marketing content/program (form fill, webinar, event)
- **Slow MQL** - must complete multiple meaningful offers (webinar + content form, etc)
- **They must contact us to MQL** - must complete contact us, demo request, other similar offer

*All non-junk leads will Auto-MQL with Contact Us Request

Tier 1: Fit = A/B & Behavior > x → Immediate hand-off

Tier 2: Fit = C & Behavior > y → Lower prioritization by reps. Or BDR queue?

Auto-MQL: Any direct Contact-Me requests

**Meant to be illustrative*

BEHAVIOR

What Behaviors Should We Score & Provide Sales Visibility Into?

- Marketing Email Engagement – clicks & responses
- Event Portal Activity
 - Logins
 - Form completions (with clearer context)
- Website Activity
 - Key Navigator and Insider product pages
 - Events pages
 - Demand Gen Services pages
 - Programs & Councils pages, etc.
- Newsletter Subscriptions
- Webinar Engagement
 - Registrations
 - Attended
- Secondary Offers / Downloadable Content (Only in CMS today?) / Social
- Anything else?

DEMOGRAPHIC & FIRMOGRAPHIC FACTORS

What Should We Prioritize?

Demographic

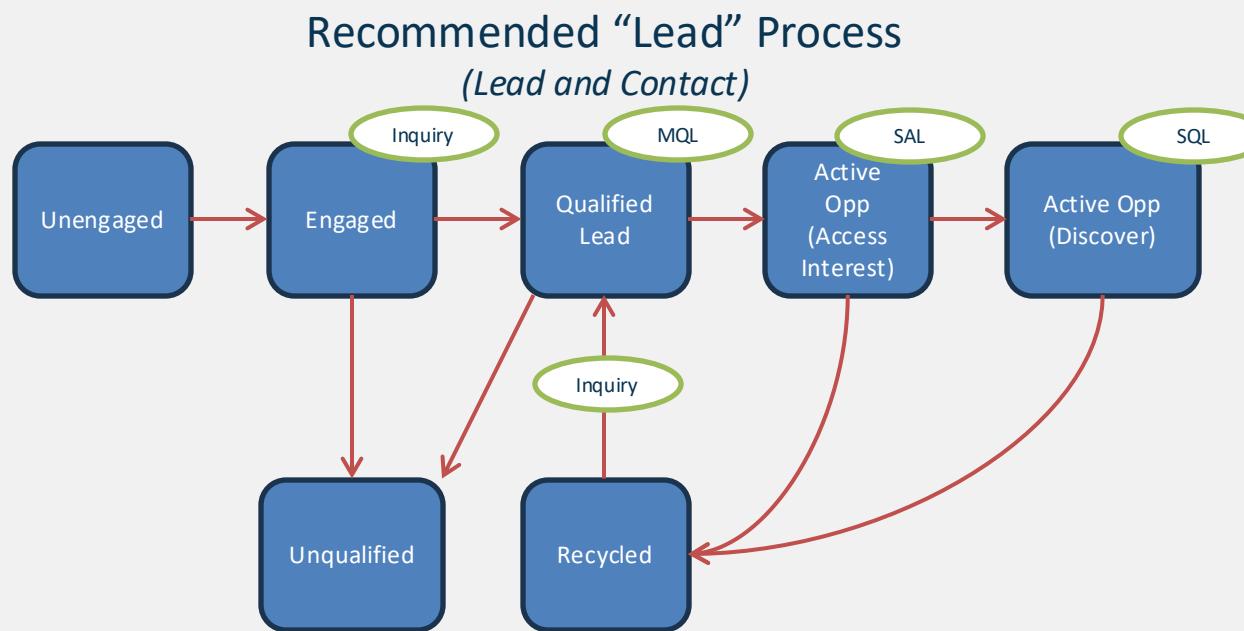
- Title
 - **Job Function** (will vary by product – event example below)
 - Best: Field, event, client, public sector sales or marketing (+4pts)
 - Better: Marketing (+3)
 - Good: Sales (+2)
 - **Seniority** (despite data) - Director+ (+1)
- Negative Filters*
 - Email address (-5)
 - Can't have generic email address
 - Can't have government or military email

Firmographic

- **Industry** - Software, tech, and consulting (+1)
- **Purchased** from us in the past (+3)
- On **TAM list** (+2)
- Negative Filters*
 - Country not equal to US (-5)

PROCESS

Move Current "Lead Opportunity" Process to Lead and Contact Object



New Lead/Contact Status	Definitions	Reporting Stage	Stage Owner
Unengaged	Cold name (no engagement with e.Republic content, programs or people)	Name	Marketing
Engaged	Person who has engaged with e.Republic (visited website, visited booth, etc...), but not enough to QL	Inquiry	Marketing
Qualified Lead	Lead or contact promoted to SDR or AE team with expectation of follow-up within SLA	MQL	AE
Access Interest (Opp)	Lead or contact accepted by SDR or AE team and actively being worked via e.Republic lead follow up best practices	SAL (Access Interest)	AE
Converted	Terminal lead status after conversion to contact	N/A	N/A
Recycled	Lead or contact which either indicates no interest in immediate sales engagement OR doesn't have any open opps	N/A or Recycled	Marketing
Unqualified	NEVER, EVER going to become a customer. Job Candidates, competitors, junk data, etc....	N/A or Unqualified	N/A
Active Opportunity	Contact is associated to Open Opportunity with access interest or higher.	SQL, Pipeline	AE

Recycled Reasons:

- No Response
- No Interest
- No Budget
- No Authority
- Existing Opp

Unqualified Reasons:

- Bad Data
- Left Company
- Student
- Bad Region
- Competitor
- Wrong Department
- Bad Company
- Junk

DATA

Standardize Data Collection Across All Inflows: Portal, Website, CMS, etc.

Visible Fields

- Name
- Title
- Company
- Email
- Phone
- Comments

Inferred Information

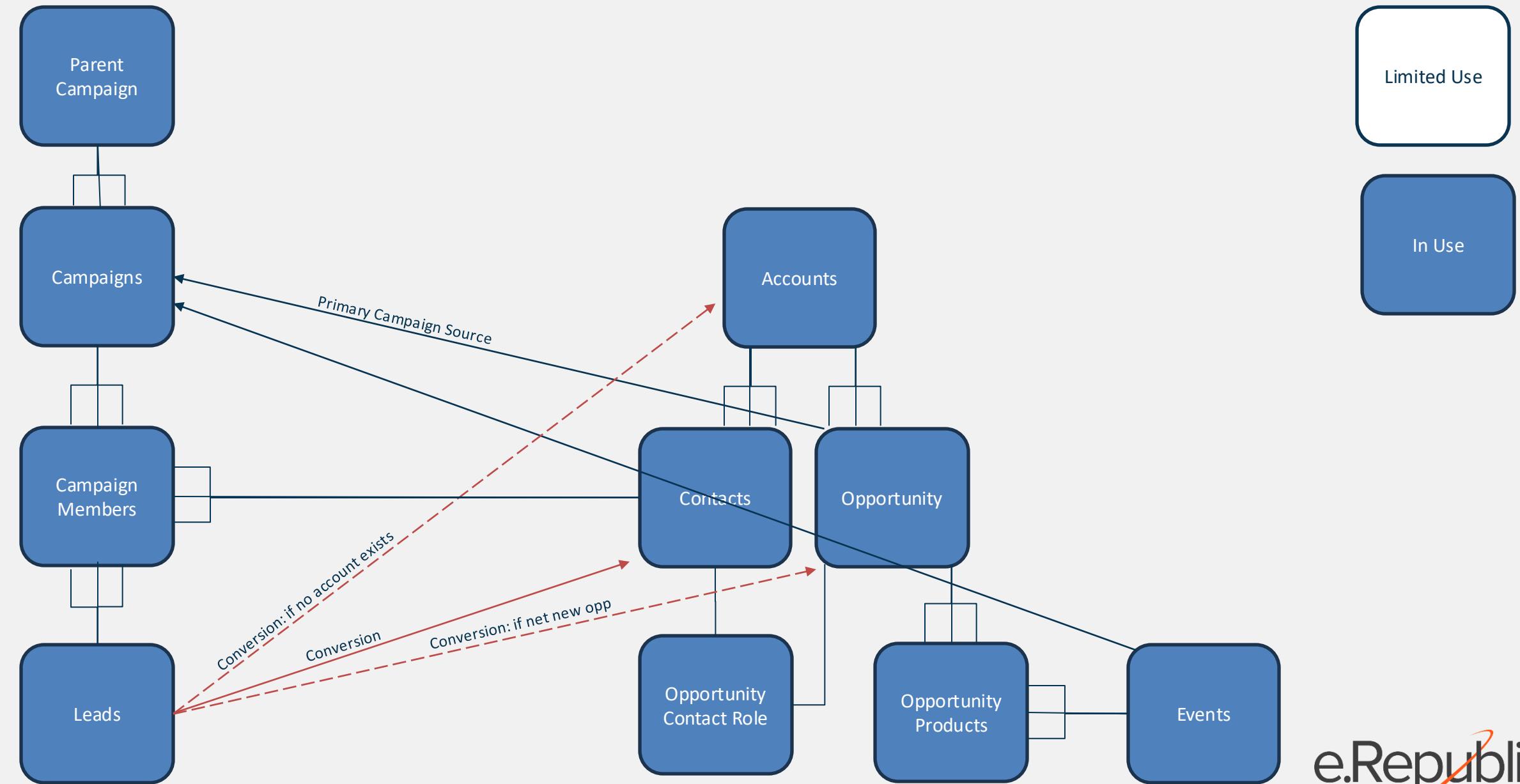
- Location (state and country)
- Company

Hidden Fields – persist across session (website, portal, etc)

- Salesforce campaign ID
- Salesforce product ID
- UTM fields
- Form name

Future Salesforce Architecture

Created for every campaign response



2024 & 2025 MQL Conversion Analysis

Data on the following slides was pulled to inform lead scoring & prioritization recommendations.

We looked at lead sources and conversion rates.

Our MQL Conversion Rates Beat Benchmarks

Because Majority Are Hand Raisers or Expressing Specific Product Interest

Funnel Stage / Metric	B2B Benchmark Values	e.Republic ('24-'25)
Visitor → Lead	2–5%	n/a
Lead → MQL (Lead Opp)	34–41%	n/a
MQL → SAL (Assess Interest)	26–40%	68.5%
SAL → SQL (Discover)	36–42%	47.4%
Opportunity → Closed-Won (Win Rate)	20–30% (avg), 35%+ (top)	35.6%
Lead → Closed-Won (Win Rate)	2–5%	11.6%

We have a **strong foundation** from which to **increase volume** in marketing and **velocity** in sales.

Benchmark Sources

- [LinkedIn] (<https://www.linkedin.com/pulse/average-b2b-lead-conversion-rate-our-data-benchmarks-pipeful-wpxqe>)
- [Belkins] (<https://belkins.io/blog/lead-generation-conversion>)
- [Powered by Search] (<https://www.poweredbysearch.com/learn/b2b-saas-funnel-conversion-benchmarks/>)
- [Only-B2B] (<https://www.only-b2b.com/blog/b2b-lead-to-mql-conversion-rate/>)
- [Forecast] (<https://forecastio.ai/blog/master-your-win-rates-to-accelerate-sales-efficiency>)
- [Martial Group] (<https://martial.ca/sales-kpis-lb/>)
- [Gradient Works] (<https://www.gradient.works/blog/2024-b2b-sales-benchmarks>)

Closed-Won Marketing Sourced Opps: 32% Higher Deal Size (\$'s) Than Average*

ALL OPPORTUNITIES

All Opps – Mktg + Sales Sources

Row Labels	Count of Case-Insensitive Opp ID	Average of Amount
2024	6983	\$ 7,447.007
2025	5189	\$ 6,652.035
Grand Total	12172	\$ 7,108.106

WON OPPORTUNITIES

Won Opps – Mktg + Sales Sources

Row Labels	Count of Case-Insensitive Opp ID	Average of Amount
2024	2019	\$ 5,832.211
2025	973	\$ 5,642.738
Grand Total	2992	\$ 5,770.595

All Opps – Mktg Sourced Only

Row Labels	Count of Case-Insensitive Opp ID	Average of Amount
2024	4837	\$ 5,576.678
2025	3557	\$ 6,644.340
Grand Total	8394	\$ 6,029.105

Won Opps – Mktg Sourced Only

Row Labels	Count of Case-Insensitive Opp ID	Average of Amount
2024	678	\$ 7,234.808
2025	363	\$ 8,419.490
Grand Total	1041	\$ 7,647.910

We want to ensure marketing sourced leads continue to yield higher deal sizes.

*[Source Report](#): '24-25, only measuring opps in Kim's org. Mktg Sourced = passed through lead opp stage.

MQL Conversion Rates by Lead Source: Inbounds Do Best

Opps Created in '24 & '25, All Products

CONVERSION BY LEAD SOURCES

Lead Source	# of MQLs	SAL %	SQL %	Win %	% Closed
Events Portal	3234	75.9%	32.2%	10.3%	79.1%
Email	2891	70.2%	36.9%	14.3%	89.2%
Submitted a Form	2563	57.9%	28.9%	11.1%	94.8%
Registered for a Webinar	229	59.8%	17.0%	1.3%	98.3%
Phone Call	30	76.7%	50.0%	6.7%	96.7%
Grand Total	8947	68.5%	32.5%	11.6%	87.4%

- Inbound email converts the best (but not efficient) – many web pages use “send an email” as the CTA
- Event portal launched mid-2024, so comparatively new with 21% unclosed opps. Win rate likely to rise.
- Goal is to optimize all lead sources – for both effectiveness and efficiency.

[Source report](#)

Event Portal: Existing Users Have the Highest Conversion Rates

Opps Created in '24 & '25, All Products

EVENT PORTAL CONVERSIONS

Lead Opps for New Contacts Created After ~4/8/25	#	SAL %	SQL %	Win %	% Closed
New Contact, Existing Account in Event Portal - Filled out web form for new account, completed login	275	83.3%	32.7%	8.7%	52.7%
New Contact, Existing Account in Event Portal - Filled out web form for new account, did not complete login	503	73.8%	33.0%	8.7%	55.9%
New Contact, New Account (Approval needed) - Filled out web form	519	81.9%	37.2%	6.6%	76.1%
Summary of the above	1297	79.0%	34.6%	7.9%	63.3%
Any unknown contact - Before tracking of three above (Before ~4/8/25)	1481	76.1%	30.9%	11.7%	91.3%
Existing Contact - filled out form within portal (all time)	447	66.9%	30.0%	13.2%	85.5%
Total Average	3234	75.9%	32.2%	10.3%	79.1%

Findings aren't surprising:

- Leads (new contacts) from existing accounts convert at the highest rate
- New companies convert at the lowest rate – we want to make it easier for them to convert
- Not much difference in conversion rate whether a new contact completes login or not

Note: Portal doesn't create a lead opp today unless prospect requests information on event sponsorship

Form Conversions: An Opportunity for Improvement

Opps Created in '24 & '25, All Products

FORM CONVERSIONS

	#	SAL %	SQL %	Win %	% Closed
Info Request: GT General	1352	52.8%	30.5%	16.2%	99.9%
Industry Insider CA Access Request	389	50.6%	21.6%	3.1%	88.9%
Industry Insider TX Access Request	353	57.2%	17.3%	3.1%	88.1%
Demo Request: Navigator	259	64.5%	42.9%	10.0%	85.3%
Industry Insider FL Access Request	204	57.4%	16.7%	1.0%	97.5%
Info Request: CDE General	96	79.2%	36.5%	13.5%	100.0%
Info Request: Sales & Advertising	8	50.0%	25.0%	12.5%	87.5%
Info Request: Subscriptions	5	40.0%	0.0%	0.0%	80.0%
Info Request: Article Submissions	3	66.7%	33.3%	0.0%	66.7%
Info Request: Year-End Discounts	1	100.0%	0.0%	0.0%	100.0%
Gov navigator - 2024	1	100.0%	100.0%	0.0%	100.0%
Grand Total	2671	55.5%	27.7%	10.6%	95.0%

INSIDER FORMS – BY COMPANY SIZE

Insider Only, Prospect Location CA/TX Only				
	# of Lead Opps	# Won	Avg Amount	Win Rate
1-10	15	3	\$ 5,300	20.0%
11-50	271	22	\$ 6,243	8.1%
51-100	17	1	\$ 5,735	5.9%
101-250	31	2	\$ 7,516	6.5%
251-500	18	0	\$ 7,778	0.0%
501-1000	17	0	\$ 5,765	0.0%
1001-5000	32	1	\$ 7,328	3.1%
5001-10000	19	0	\$ 6,421	0.0%
10000+	22	1	\$ 5,932	4.5%
Unknown	66	4	\$ 5,686	6.1%

- Info Request: GT General (high win rate) – largely replaced by event portal
- Info Request: CDE (also higher win rate) – also no longer used.
- Insider Forms have low win rates, but are much higher for private sector companies in CA/TX with less than 250 employees

Data Says Senior Titles Do Not Convert at Higher Rate, But Are Related to Higher Deal Sizes (Sometimes)

Seniority Title	#	SAL %	SQL %	Win %	% Closed	Avg Amount
Other	6455	67.7%	32.5%	12.4%	88.2%	\$ 5,981
Director	1194	69.1%	32.8%	9.0%	85.9%	\$ 6,205
C-Suite	531	71.8%	33.0%	11.9%	87.0%	\$ 5,389
VP	507	73.6%	33.5%	9.3%	85.2%	\$ 6,474
Grand Total	8687	68.5%	32.6%	11.7%	87.6%	\$ 6,004

Sales Seniority	#	SAL %	SQL %	Win %	% Closed	Avg Amount
Sales Titles	3560	69.4%	33.5%	12.4%	88.3%	\$ 5,742
Other	3094	68.8%	33.6%	12.9%	88.8%	\$ 5,665
Director	324	71.3%	33.3%	9.9%	85.2%	\$ 6,426
VP	138	78.3%	31.9%	8.7%	85.5%	\$ 5,932
C-Suite	4	50.0%	25.0%	0.0%	75.0%	\$ 3,000
Non-Sales	5127	67.9%	31.9%	11.3%	87.1%	\$ 6,187
Other	3361	66.7%	31.4%	12.0%	87.6%	\$ 6,272
Director	870	68.3%	32.6%	8.7%	86.2%	\$ 6,122
C-Suite	527	71.9%	33.0%	12.0%	87.1%	\$ 5,407
VP	369	71.8%	34.1%	9.5%	85.1%	\$ 6,677
Grand Total	8687	68.5%	32.6%	11.7%	87.6%	\$ 6,004

Common sense says that senior titles are more valuable/influential than the data is showing.

Marketing Seniority	#	SAL %	SQL %	Win %	% Closed	Avg Amount
All Marketing Titles	1574	70.0%	36.0%	14.4%	87.0%	\$ 6,816
Other	1248	69.7%	35.5%	15.1%	87.5%	\$ 6,787
Director	239	70.7%	38.1%	12.1%	85.4%	\$ 7,132
VP	64	73.4%	42.2%	9.4%	82.8%	\$ 6,336
C-Suite	23	69.6%	26.1%	13.0%	91.3%	\$ 6,402
Non-Marketing Titles	7113	68.2%	31.8%	11.1%	87.8%	\$ 5,825
Other	5207	67.3%	31.7%	11.8%	88.3%	\$ 5,788
Director	955	68.7%	31.5%	8.3%	86.1%	\$ 5,974
C-Suite	508	71.9%	33.3%	11.8%	86.8%	\$ 5,343
VP	443	73.6%	32.3%	9.3%	85.6%	\$ 6,494
Grand Total	8687	68.5%	32.6%	11.7%	87.6%	\$ 6,004

Conversion Rates by Title Groups

Good: Marketing, Event/Field, SLED/Public

Has Marketing Title						
	#	SAL %	SQL %	Win %	% Closed	Avg Amount
Marketing Title	1574	70.0%	36.0%	14.4%	87.0%	\$ 6,816
Not	7113	68.2%	31.8%	11.1%	87.8%	\$ 5,825
Grand Total	8687	68.5%	32.6%	11.7%	87.6%	\$ 6,004

Has Tech Title						
	#	SAL %	SQL %	Win %	% Closed	Avg Amount
Tech Title	151	55.0%	20.5%	4.6%	87.4%	\$ 5,695
Not	8536	68.7%	32.8%	11.9%	87.6%	\$ 6,010
Grand Total	8687	68.5%	32.6%	11.7%	87.6%	\$ 6,004

Has Sales Title						
	#	SAL %	SQL %	Win %	% Closed	Avg Amount
Sales Title	3560	69.4%	33.5%	12.4%	88.3%	\$ 5,742
Not	5127	67.9%	31.9%	11.3%	87.1%	\$ 6,187
Grand Total	8687	68.5%	32.6%	11.7%	87.6%	\$ 6,004

Has Event / Field in Title						
	#	SAL %	SQL %	Win %	% Closed	Avg Amount
Marketing Titles	1574	70.0%	36.0%	14.4%	87.0%	\$ 6,816
Event / Field	421	68.9%	37.8%	20.4%	88.6%	\$ 6,900
Other	1153	70.4%	35.4%	12.2%	86.5%	\$ 6,785
Non-marketing	7113	68.2%	31.8%	11.1%	87.8%	\$ 5,825
Event / Field	10	60.0%	40.0%	40.0%	100.0%	\$ 4,825
Other	7103	68.2%	31.8%	11.1%	87.7%	\$ 5,826
Total	8687	68.5%	32.6%	11.7%	87.6%	\$ 6,004

Has Alliances Title						
	#	SAL %	SQL %	Win %	% Closed	Avg Amount
Alliances	192	67.2%	31.3%	8.9%	86.5%	\$ 5,452
Not	8495	68.5%	32.6%	11.8%	87.7%	\$ 6,017
Grand Total	8687	68.5%	32.6%	11.7%	87.6%	\$ 6,004

Has SLED/Public/Gov in Title						
	#	SAL %	SQL %	Win %	% Closed	Avg Amount
Sales Titles	3560	69.4%	33.5%	12.4%	88.3%	\$ 5,742
SLED	527	69.6%	33.4%	15.7%	88.2%	\$ 5,854
Other	3033	69.4%	33.6%	11.9%	88.4%	\$ 5,723
Non-Sales	5127	67.9%	31.9%	11.3%	87.1%	\$ 6,187
SLED	480	69.2%	34.4%	12.7%	89.6%	\$ 6,747
Other	4647	67.7%	31.7%	11.1%	86.9%	\$ 6,129
Total	8687	68.5%	32.6%	11.7%	87.6%	\$ 6,004

Has "Client" in Title						
	#	SAL %	SQL %	Win %	% Closed	Avg Amount
Client	327	73.7%	33.6%	13.8%	89.3%	\$ 5,748
Not	8360	68.3%	32.6%	11.7%	87.6%	\$ 6,014
Grand Total	8687	68.5%	32.6%	11.7%	87.6%	\$ 6,004

Most Common Titles and Most Common Unclassified by Function

Top Titles by #							Avg Amo
	#	SAL %	SQL %	Win %	% Closed	Avg Amo	
Account Executive	640	70.0%	34.1%	14.5%	89.5%	\$ 4,995	
Account Manager	279	66.7%	36.2%	13.6%	91.8%	\$ 5,189	
(blank)	260	68.1%	27.7%	5.8%	80.8%	\$ 4,724	
CEO	200	71.0%	31.5%	11.5%	90.0%	\$ 4,950	
Director	178	64.6%	30.9%	10.1%	85.4%	\$ 4,896	
Marketing Manager	162	69.8%	38.9%	9.9%	86.4%	\$ 5,644	
President	116	71.6%	43.1%	11.2%	86.2%	\$ 5,388	
AE	100	66.0%	26.0%	8.0%	87.0%	\$ 4,558	
Regional Sales Manager	94	62.8%	29.8%	11.7%	88.3%	\$ 4,725	
MArketing	89	75.3%	32.6%	7.9%	84.3%	\$ 5,039	
Field Marketing Manager	80	68.8%	40.0%	17.5%	88.8%	\$ 5,568	
Client Executive	71	78.9%	38.0%	15.5%	83.1%	\$ 5,919	
Director of Marketing	69	62.3%	33.3%	15.9%	85.5%	\$ 6,500	
Senior Account Executive	69	82.6%	39.1%	15.9%	91.3%	\$ 5,057	
Sales	67	73.1%	23.9%	3.0%	83.6%	\$ 4,970	
Marketing Coordinator	62	67.7%	33.9%	16.1%	90.3%	\$ 6,311	
Enterprise Account Executive	57	77.2%	33.3%	14.0%	93.0%	\$ 4,636	
Manager	53	52.8%	20.8%	3.8%	90.6%	\$ 4,849	
Account Director	51	80.4%	33.3%	13.7%	88.2%	\$ 5,843	
Vice President	50	60.0%	30.0%	2.0%	88.0%	\$ 6,479	
Sr Account Executive	47	66.0%	44.7%	17.0%	91.5%	\$ 5,824	
Consultant	46	63.0%	21.7%	0.0%	84.8%	\$ 6,613	
VP	45	73.3%	31.1%	13.3%	73.3%	\$ 6,916	
Marketing Director	44	79.5%	43.2%	2.3%	86.4%	\$ 5,511	
Business Development Manager	41	61.0%	34.1%	4.9%	92.7%	\$ 4,024	
Sales Manager	41	51.2%	22.0%	2.4%	90.2%	\$ 4,854	
Business Development	39	69.2%	35.9%	10.3%	92.3%	\$ 5,821	
Sr. Account Executive	38	60.5%	39.5%	18.4%	94.7%	\$ 4,000	
Marketing Specialist	36	58.3%	25.0%	8.3%	86.1%	\$ 4,458	
Sales Director	36	63.9%	19.4%	2.8%	77.8%	\$ 4,486	
Owner	35	51.4%	20.0%	8.6%	97.1%	\$ 4,337	
Founder	34	79.4%	35.3%	11.8%	85.3%	\$ 3,838	
Managing Director	33	72.7%	33.3%	18.2%	84.8%	\$ 5,348	

Top Titles by # w. Unclassified Job Function						Avg Amount
	#	SAL %	SQL %	Win %	% Closed	Avg Amount
CEO	200	71.0%	31.5%	11.5%	90.0%	\$ 5,320
Director	178	64.6%	30.9%	10.1%	85.4%	\$ 5,349
President	116	71.6%	43.1%	11.2%	86.2%	\$ 6,998
Manager	53	52.8%	20.8%	3.8%	90.6%	\$ 5,038
Vice President	50	60.0%	30.0%	2.0%	88.0%	\$ 7,610
Consultant	46	63.0%	21.7%	0.0%	84.8%	\$ 8,933
VP	45	73.3%	31.1%	13.3%	73.3%	\$ 7,083
Owner	35	51.4%	20.0%	8.6%	97.1%	\$ 4,486
Founder	34	79.4%	35.3%	11.8%	85.3%	\$ 3,912
Managing Partner	33	69.7%	36.4%	15.2%	87.9%	\$ 5,606
Managing Director	33	72.7%	33.3%	18.2%	84.8%	\$ 5,652
Partner	33	75.8%	42.4%	15.2%	84.8%	\$ 4,474
Principal	30	66.7%	23.3%	6.7%	90.0%	\$ 5,550
COO	27	63.0%	37.0%	7.4%	88.9%	\$ 5,481
Territory Manager	22	77.3%	36.4%	22.7%	95.5%	\$ 5,523
SVP	17	76.5%	29.4%	11.8%	82.4%	\$ 6,382
Senior Consultant	17	76.5%	23.5%	5.9%	82.4%	\$ 6,059
Senior Manager	16	62.5%	31.3%	18.8%	87.5%	\$ 10,875
RSM	15	33.3%	13.3%	13.3%	93.3%	\$ 5,850
Regional Director	14	92.9%	35.7%	0.0%	100.0%	\$ 4,607
Founder & CEO	14	85.7%	50.0%	0.0%	92.9%	\$ 3,929
CRO	14	92.9%	28.6%	7.1%	71.4%	\$ 3,357
Co-Founder	13	84.6%	38.5%	15.4%	84.6%	\$ 5,500
Demand Generation	13	76.9%	46.2%	0.0%	76.9%	\$ 6,962
Sr. Director	12	75.0%	33.3%	8.3%	75.0%	\$ 8,917
Senior Director	12	83.3%	16.7%	8.3%	83.3%	\$ 7,583
Associate Director	12	75.0%	25.0%	8.3%	91.7%	\$ 7,583
Chief Executive Officer	12	83.3%	33.3%	8.3%	75.0%	\$ 3,792
Executive Assistant	11	54.5%	18.2%	18.2%	90.9%	\$ 4,318
Analyst	11	54.5%	9.1%	0.0%	81.8%	\$ 5,864
President & CEO	10	40.0%	30.0%	10.0%	90.0%	\$ 7,700
EVP	10	70.0%	40.0%	10.0%	100.0%	\$ 5,550
Chief Strategy Officer	9	55.6%	33.3%	22.2%	100.0%	\$ 6,333
Chief Operating Officer	9	77.8%	33.3%	0.0%	88.9%	\$ 7,099
Senior Managing Partner	8	37.5%	25.0%	12.5%	87.5%	\$ 3,750

Opps Created in '24 & '25, All Products

Top Titles by Win Rate and Avg Amount

Top Titles by #									
	#	SAL %	SQL %	Win %	% Closed	Avg Amo			
Sr Director	6	66.7%	33.3%	0.0%	100.0%	\$ 15,667			
Vice President, Sales	6	66.7%	50.0%	16.7%	100.0%	\$ 10,167			
Advisor	5	100.0%	100.0%	80.0%	80.0%	\$ 9,800			
Student	7	42.9%	28.6%	28.6%	100.0%	\$ 9,286			
Cybersecurity specialists	5	60.0%	40.0%	0.0%	100.0%	\$ 9,100			
Operations Manager	6	100.0%	50.0%	33.3%	66.7%	\$ 9,000			
Field Account Executive	6	66.7%	66.7%	33.3%	100.0%	\$ 8,917			
Senior Client Director	8	62.5%	37.5%	12.5%	100.0%	\$ 8,813			
Public Sector Lead	5	80.0%	60.0%	0.0%	80.0%	\$ 8,600			
Chief of Staff	7	85.7%	71.4%	28.6%	85.7%	\$ 8,571			
Client Advisor	5	100.0%	20.0%	0.0%	60.0%	\$ 8,000			
Director, Marketing	14	71.4%	35.7%	14.3%	71.4%	\$ 7,982			
Senior Enterprise Account Executive	7	71.4%	42.9%	14.3%	85.7%	\$ 7,929			
Cloud Marketing Manager	5	100.0%	0.0%	0.0%	60.0%	\$ 7,800			
Senior Solutions Consultant	7	57.1%	14.3%	14.3%	100.0%	\$ 7,714			
President & CEO	10	40.0%	30.0%	10.0%	90.0%	\$ 7,700			
SLED AE	14	85.7%	35.7%	7.1%	78.6%	\$ 7,679			
Senior Manager	16	62.5%	31.3%	18.8%	87.5%	\$ 7,625			
Senior Project Manager	6	33.3%	16.7%	0.0%	100.0%	\$ 7,583			
Product Marketing Manager	9	66.7%	44.4%	33.3%	100.0%	\$ 7,500			
Director, Public Sector	6	66.7%	66.7%	16.7%	83.3%	\$ 7,333			
Marketing Lead	6	83.3%	16.7%	0.0%	83.3%	\$ 7,250			
BDR	6	66.7%	33.3%	0.0%	100.0%	\$ 7,167			
Account Exec	9	66.7%	22.2%	0.0%	100.0%	\$ 7,056			
Associate Account Manager	5	100.0%	60.0%	20.0%	100.0%	\$ 7,000			
VP of Marketing	26	73.1%	50.0%	19.2%	92.3%	\$ 6,942			
VP Marketing	12	75.0%	41.7%	0.0%	58.3%	\$ 6,917			
AVP	6	66.7%	50.0%	16.7%	83.3%	\$ 6,917			
VP	45	73.3%	31.1%	13.3%	73.3%	\$ 6,916			
Events Marketing Coordinator	8	75.0%	62.5%	62.5%	100.0%	\$ 6,906			
Systems Engineer	5	40.0%	0.0%	0.0%	60.0%	\$ 6,900			
Sr. Director	12	75.0%	33.3%	8.3%	75.0%	\$ 6,833			
Territory Sales Manager	6	66.7%	33.3%	16.7%	83.3%	\$ 6,833			
Regional Marketing Manager	6	83.3%	50.0%	33.3%	83.3%	\$ 6,750			

Top Titles by #									
	#	SAL %	SQL %	Win %	% Closed	Avg Amo			
Advisor	5	100.0%	100.0%	80.0%	80.0%	\$ 9,800			
Events Marketing Coordinator	8	75.0%	62.5%	62.5%	100.0%	\$ 6,906			
Senior Regional Director	5	80.0%	80.0%	60.0%	100.0%	\$ 5,800			
Events Manager	6	83.3%	83.3%	50.0%	100.0%	\$ 4,833			
Director of Field Marketing	5	80.0%	60.0%	40.0%	100.0%	\$ 6,300			
SLED Sales	5	80.0%	40.0%	40.0%	100.0%	\$ 6,100			
Business Manager	5	60.0%	40.0%	40.0%	100.0%	\$ 5,800			
Sales Operations Manager	5	40.0%	40.0%	40.0%	100.0%	\$ 5,100			
Customer Success Manager	5	80.0%	40.0%	40.0%	100.0%	\$ 4,900			
Regional Sales Manager, SLED	5	80.0%	60.0%	40.0%	80.0%	\$ 3,650			
Director of Sales: Public Sector	5	80.0%	40.0%	40.0%	100.0%	\$ 3,200			
Account Executive Public Sector	8	87.5%	50.0%	37.5%	100.0%	\$ 5,994			
Event Manager	8	62.5%	37.5%	37.5%	100.0%	\$ 5,250			
Enterprise Account Manager	11	72.7%	54.5%	36.4%	90.9%	\$ 5,673			
Senior Marketing Manager	14	64.3%	50.0%	35.7%	85.7%	\$ 6,214			
Operations Manager	6	100.0%	50.0%	33.3%	66.7%	\$ 9,000			
Field Account Executive	6	66.7%	66.7%	33.3%	100.0%	\$ 8,917			
Product Marketing Manager	9	66.7%	44.4%	33.3%	100.0%	\$ 7,500			
Regional Marketing Manager	6	83.3%	50.0%	33.3%	83.3%	\$ 6,750			
Marketing Account Lead	9	88.9%	44.4%	33.3%	100.0%	\$ 6,333			
CIO	9	55.6%	55.6%	33.3%	88.9%	\$ 5,222			
Field Marketing Manager: SLED	6	66.7%	33.3%	33.3%	100.0%	\$ 3,208			
Sr. Marketing Manager	16	75.0%	62.5%	31.3%	93.8%	\$ 5,188			
Strategic Account Manager	13	69.2%	69.2%	30.8%	92.3%	\$ 5,731			
Marketing Assistant	10	90.0%	60.0%	30.0%	70.0%	\$ 4,800			
Student	7	42.9%	28.6%	28.6%	100.0%	\$ 9,286			
Chief of Staff	7	85.7%	71.4%	28.6%	85.7%	\$ 8,571			
Sr Sales Security Advisor - SLED Nor	7	28.6%	28.6%	28.6%	100.0%	\$ 6,464			
Account Executive - SLED	11	72.7%	54.5%	27.3%	72.7%	\$ 5,136			
Client Manager	22	50.0%	31.8%	27.3%	90.9%	\$ 4,951			
SLED Account Executive	24	70.8%	41.7%	25.0%	83.3%	\$ 4,948			
District Sales Manager	8	75.0%	50.0%	25.0%	75.0%	\$ 4,000			
Event Coordinator	13	69.2%	46.2%	23.1%	69.2%	\$ 5,154			
Territory Manager	22	77.3%	36.4%	22.7%	95.5%	\$ 5,500			

Employee Size: No Clear Trend, Except All Sizes Are Valuable

Industry: Tech & Consulting Companies Convert Best

of Employees

	# of Lead Opps	# Won	Avg Amount	Win Rate
1-10	562	65	\$ 5,990	11.6%
11-50	1578	157	\$ 6,393	9.9%
51-100	618	69	\$ 6,069	11.2%
101-250	807	86	\$ 6,513	10.7%
251-500	764	103	\$ 5,925	13.5%
501-1000	817	106	\$ 6,055	13.0%
1001-5000	1524	178	\$ 7,011	11.7%
5001-10000	707	73	\$ 5,501	10.3%
10000+	1747	239	\$ 5,963	13.7%
Unknown	367	27	\$ 5,386	7.4%

Industry

	# of Lead Opps	Win Rate	Avg Amount
Construction & Engineering	49	6.1%	\$ 6,026
Education & Research	137	5.8%	\$ 5,636
Energy, Utilities & Environment	17	5.9%	\$ 8,647
Finance & Insurance	77	9.1%	\$ 7,195
Government & Public Sector	58	6.9%	\$ 4,905
Healthcare & Life Sciences	25	4.0%	\$ 6,500
Manufacturing & Industry	523	9.2%	\$ 6,176
Media & Communications	18	5.6%	\$ 6,917
Other / Uncategorized	612	9.8%	\$ 6,044
Professional & Consulting Services	3893	12.9%	\$ 5,898
Retail & Consumer Services	147	2.7%	\$ 5,586
Technology & Cybersecurity	3018	13.1%	\$ 6,129
Transportation & Logistics	34	2.9%	\$ 6,118
(blank)	366	4.1%	\$ 5,432

Key Questions: What Channels Will Feed Into New Lead Process?

- **What channels will create/update leads in SFDC?**
 - Marketing – yes, but...
 - For every marketing inquiry, only some types of inquiries, or just for “MQL’s”?
 - DQL – done over email today?
 - SQL – probably unrealistic to ask sales people to do this
- **Considerations:**
 - Best to have single process for most things – easier to maintain and simplicity easier for sales to adhere to.
 - Need to have realistic expectations of SDR’s and of AE’s – too much overhead = productivity loss.
 - Multiple non-marketing lead sources involved (ie, we have influence, not control)

Key Questions: How Will We Handle the 2nd, 3rd, etc. Marketing Inquiry/MQL from an Existing Lead or Contact?

1. A lead will be created for every inquiry/MQL, even when the person already exists in SFDC (Salespeople only work leads and opps)

- Pros:
 - 1:1 inquiry/MQL to record relationship makes accounting straightforward.
- Cons:
 - Sales will have to hunt in SFDC for the full picture of an inquiry (previously engaged? Has an opp?, etc)
 - Not supported by native HS<>SFDC sync

2. A lead will be created for every new person, but existing leads will be updated (Salespeople only work leads and opps)

- Pros:
 - Only need to maintain leads to support pre-opp sales process.
- Cons:
 - Lead record will show previous marketing engagements (at least for post-launch activity)
 - Not supported by native HS<>SFDC sync

3. A lead will be created for every new person, but existing leads and contacts will be updated (Salespeople work leads, contacts, and opps)

- Pros:
 - Best “full picture” solution for sales. (contact will naturally be tied to opps, previous activity).
 - Supported by native HS<>SFDC Sync
- Cons:
 - Requires supporting “lead process” on two objects + a little extra training for sales
 - Makes native SFDC reporting more difficult (one report=one leads and one contact reports)

Current State

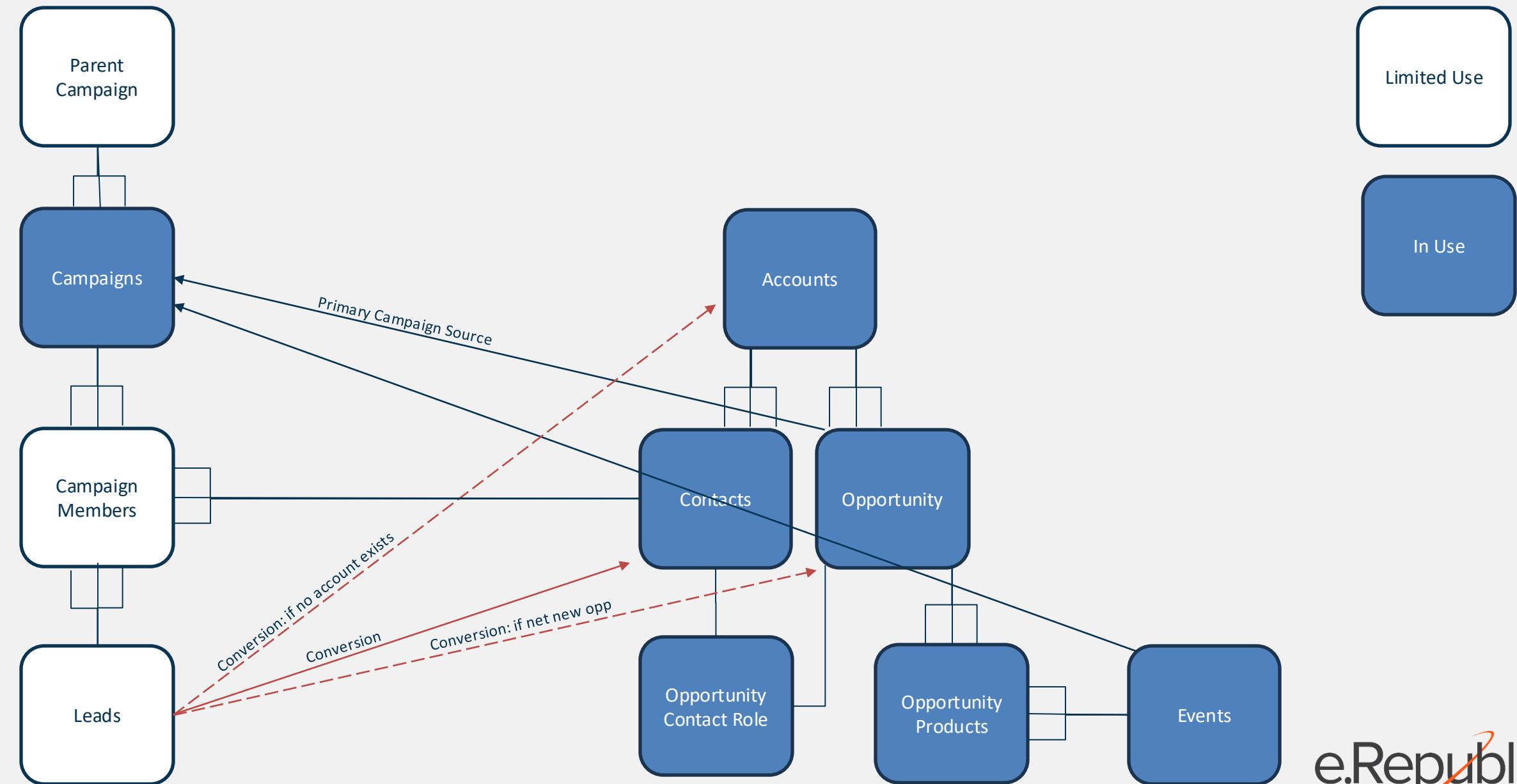
Key Challenges

- **Unintegrated processes & systems**
 - Legacy point systems do the job, but we're changing the "job"
- **Complex custom SFDC implementation**
 - Implementation is highly customized for eRepublic's business, but that makes further customizations challenging and 3rd party vendor out-of-the-box solutions unusable.
- **Reshaping the marketing to sales hand-off**
 - Change can be scary and disruptive.
- **Multiple product families of different types**
 - ARR vs non-ARR and services vs sponsorships
- **Business processes have deep and opaque roots**
 - Age of business may have led to lost institutional knowledge and technical debt

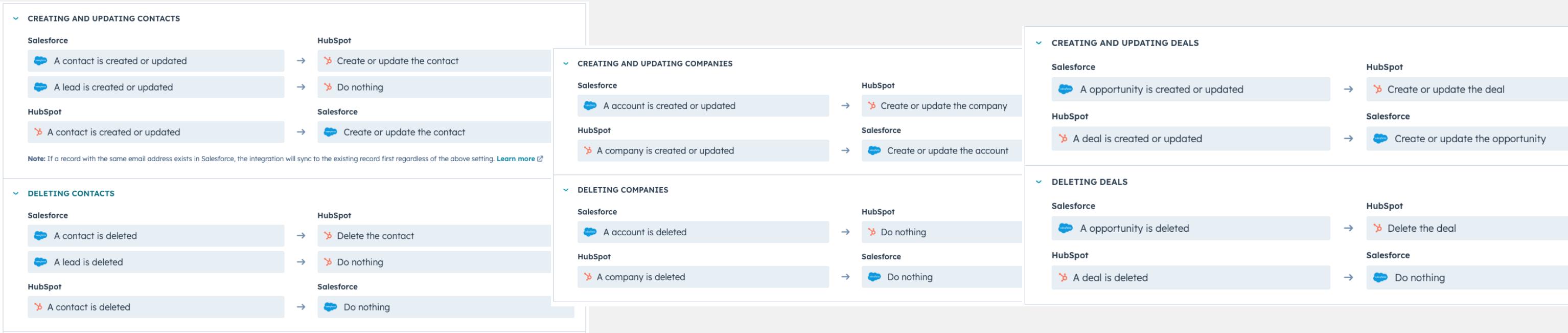
Today's Integration Architecture Overview



Current Salesforce Architecture



Current Hubspot<>Salesforce Integration Setup



- Hubspot can read SFDC Campaign data by default, but doesn't sync to HS campaigns.
- Also can push HS campaign data to SFDC via workflows, but would need to set-up and maintain (fairly manual)

Lead Flows

Today's Integration Architecture Overview

To Come

Lead Object Project

Marketing Attribution & Reporting Structures

Benefits of Accessible Marketing Attribution Insights

- **For company executives:**
 - Anchor “value of marketing” to marketing’s contribution to company revenue generation
 - Identify marketing driven revenue growth opportunities
 - Inform company leadership on channel & product investment decisions
- **For marketing team members:**
 - Creates culture of accountability and data-driven decision making
 - Provides data to make ROI driven channel and program investment decisions
 - Defines and measures common quantitative success metrics

Defining a “Campaign”

- **This is a key decision to ensure we are measuring what we want to be measuring**
- **What is a campaign?**
 - Recommended: Offer + tactic/channel
 - Ie.
 - 2025-05-21 - Email - Whitepaper: 3 Ways to Engage Government Buyers
 - 2025 – Website – Whitepaper: 3 Ways to Engage Government Buyers
- **When should we use parent campaigns?**
 - Thematic / product marketing defined GTM plays (usually span quarters)
 - Super programs – with multi-channel or multi-step child campaigns
- **Should we include non-marketing sources within campaign definition?**
 - Sales tactics – specific or general outbound sales campaigns
 - DQL's
 - Partner
 - ???
 - Answer is “yes” for full picture and most credibility.
- **Use UTM's (or promocodes) for more refined analysis when more complex campaign structures aren't practical/possible**
 - Promocode – proxy for below...
 - utm_source - website, email, google
 - utm_medium – ie, email, social media, or ppc
 - utm_campaign - names the specific marketing initiative or campaign
 - utm_term - Identifies paid keyword
 - utm_content: specific element of your ad or promotion that was clicked

Will Need to Select Approved Attribution Model(s)

- **Last Touch**

- Definition: 100% credit to the touchpoint which led to the sales engagement which led to opp creation
- Pros: direct and simple – great for ID'ing programs that drive opp creation.
- Cons: no credit given to previous touchpoints which warmed account

- **First Touch**

- Definition: 100% credit to the touchpoint which created the name in the database
- Pros: direct and simple – great for ID'ing programs which create the best future prospects
- Cons: no credit given to previous touchpoints which warmed account, or directly created the opp

- **Multi-Touch**

- **Even Weighting**

- Definition: Credit evenly distributed across every touchpoint
- Pros: “fair” and recognizes prospects need to be warmed up over multiple touches.
- Cons: Buying intent and level of engagement are not equal across all campaigns. Also over counts programs which have a wide but shallow engagement pool (ie, newsletters, etc)

- **Engagement Type Weighting**

- Definition: Credit is distributed based on pre-defined amounts based on inferred buying intent and time commitment from prospect (ie, 60 minute webinar on Navigator product gets more points than clicks on early stage content pieces).
- Cons: May over credit past programs which didn't move buyer closer to sales discussions.

- **Custom Weighting**

- Many more possibilities...
- Multi-touch models with more or less weight on key milestones: first or last touch, lead creation, etc.

Additional Factors:

- **Time Decay** – touches expire after x days/months and then given no credit.
- **Account or OCR Models** – should all touches on account get credit or just those on Opp Contact Roles?

Recommendations:

- **First Touch** – stamp every new lead with the campaign which created it. Easy to do.
- **Last Touch** – model which sales understands most, and arguably ID's most important programs.
- **Multitouch (Engagement Type Weighting)** – fairest and most helpful to marketing team.

Salesforce's Attribution Capabilities

- Salesforce attribution is based off campaign/campaign member objects
 - Need records for all types of "campaigns" in SFDC and diligence around associating leads/contacts to them for responses.
- Positives:
 - No additional cost
 - Dashboards would be in SFDC
- Two "models":
 - Primary campaign source – last touch:
 - SFDC automatically fills this opp field with the last campaign the contact responded to.
 - Negative is that if the last touch happens after the sales conversation was already started by a previous marketing touch, the "correct" campaign won't get credit.
 - We do have the ability to manually audit and update the field. (which is common).
 - Campaign Influence – multi-touch:
 - Config which allows us to set time constraint on how far back SFDC looks and add some basic campaign record filters to calculate multi-touch attribution.
 - Negative is its an even weighted model (email click gets same credit as webinar attendee, contact us form)

Hubspot's Attribution Capabilities

- HubSpot needs to see campaign interactions (form fills, email clicks, etc)
 - Will need to integrate non-Hubspot processes (event portal, offline events)

Popular Attribution Platforms – High Level Summary

Tool	Pros	Cons	Ideal Customer	Relative Cost
Bizable	Deep Salesforce integration, customizable multi-touch attribution, good for B2B	Complex setup, expensive, weaker HubSpot support	Large B2B orgs with mature Salesforce usage	High
CaliberMind	Strong RevOps focus, supports both Salesforce and HubSpot, flexible models	Steeper learning curve, requires good data hygiene	B2B companies needing revenue insights across systems	Medium-High
LeanData	Great for routing + attribution, native Salesforce integration	Salesforce only, more of a lead routing tool with attribution add-ons	Salesforce-heavy orgs focused on ABM and routing	Medium-High
Dreamdata	Strong B2B attribution, account-based tracking, works with both SFDC and HubSpot	Data sync complexity, dashboard UI can overwhelm new users	B2B companies with long journeys using both HubSpot & SFDC	Medium-High
Full Circle Insights	Campaign influence reporting native to Salesforce, customizable dashboards	Salesforce only, setup can be labor intensive	B2B orgs using Salesforce campaigns for marketing attribution	Medium
Wicked Reports	Strong for ecomm and lead gen, good HubSpot integration	Not Salesforce native, less effective for long B2B sales cycles	Ecomm + B2C or simple B2B funnels using HubSpot	Medium
HockeyStack	Modern UX, easy to implement, strong for product-led growth models	Newer entrant, evolving feature set	B2B SaaS with a product-led or content-driven GTM	Medium
Propensity	Contact-level insights, easy setup, budget-friendly	Less established, may lack enterprise-grade features. ABM platform 1st, attribution tool 2nd.	Mid-market B2B teams using HubSpot and/or Salesforce	Low-Medium

Build vs. Buy

- Most attribution vendor solutions will be based off standard SFDC data structure (Leads, contacts, accounts, campaigns)
 - Meaning unless we get our campaign data (for all channels) into SFDC, we are unlikely to be able to use 3rd party tool without extensive custom integration work.
- Building our own:
 - Attribution solutions have 3 parts – will need solution for each:
 - Database and/or Integration to database
 - Calculation engine
 - Visualization (dashboard + reports)
 - Support – would need team member who can build and maintain(!):
 - Integration with SFDC and other systems with campaign data
 - Can code attribution model calculations
 - Build out custom dashboards
 - Pros:
 - Complete freedom to set it up how we want
 - Can be built outside of operational systems to not shoehorn marketing/sales process to fit attribution needs
 - Cheap in terms of money
 - Cons
 - No landlord to call when something breaks
 - Can't utilize vendor innovation
 - Expensive in terms of time
 - Takes more time to build vs buy

Thank you.

APPENDIX



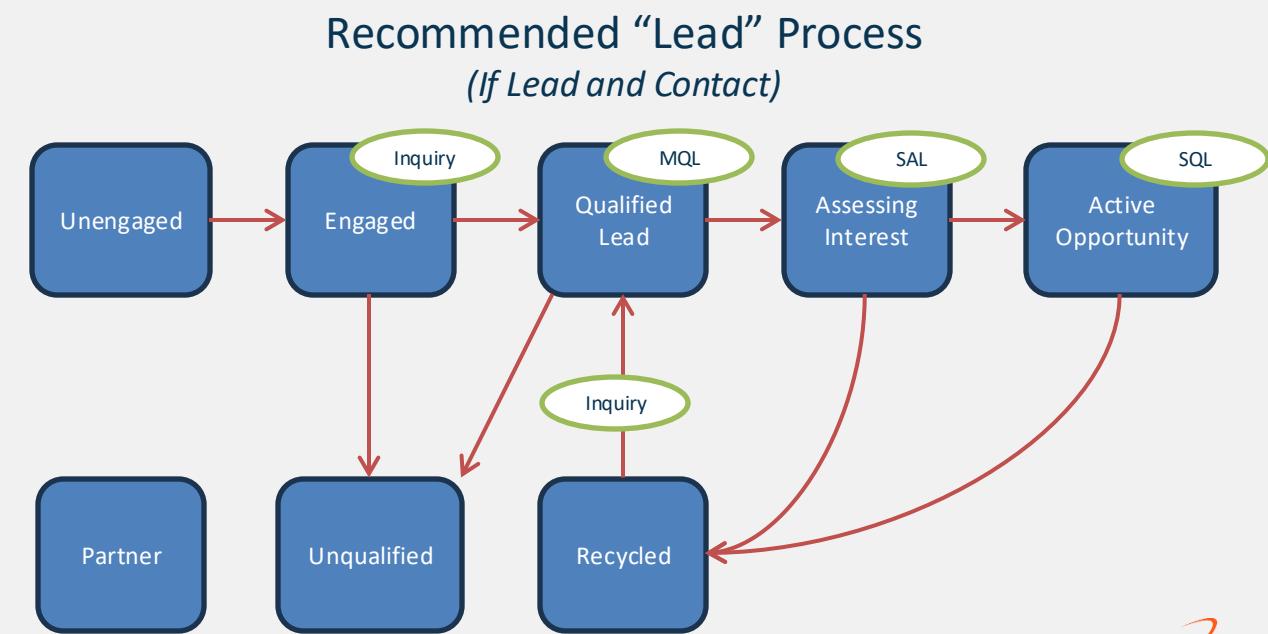
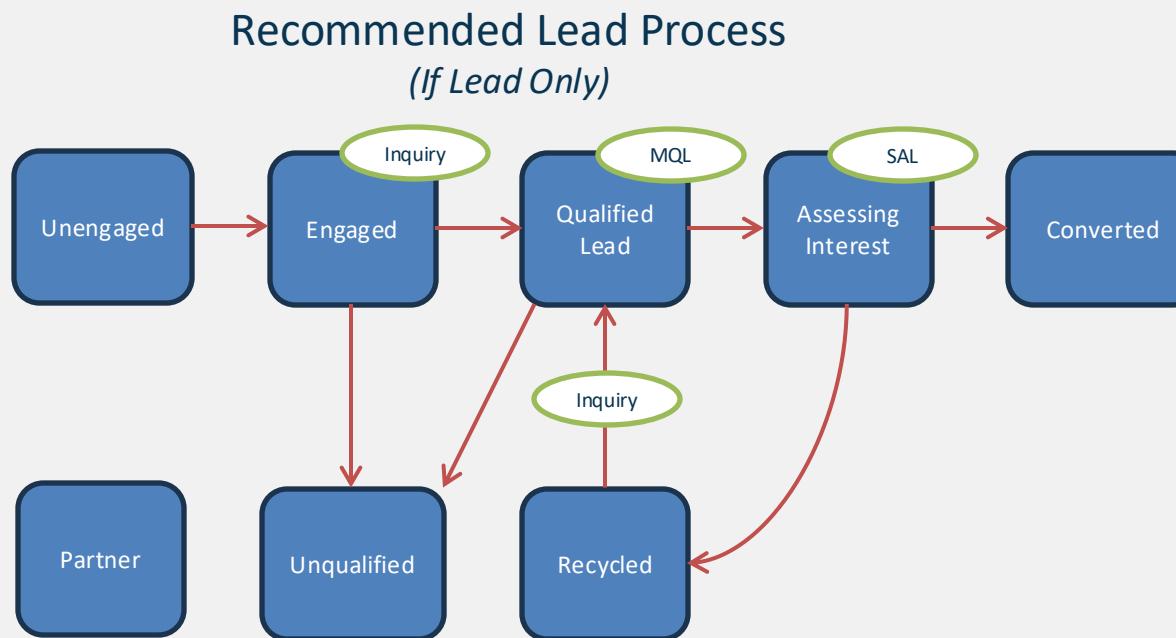
notes

- Form Audit – list what lead in flows, where, for what, and the process and systems they connect to
- Lead Object architecture decisions
 - Lead status process
 - Duplicate question
 - Hubspot integration architecture
 - SQL and DQL process & integration
 - Lead scoring
 - Demographic/firmographic
 - Behavioral – personal or account scores
 - Predictive – probably would need use vendors
- SFDC Campaigns – Should every program has a campaign?
- UTM and promocode use
 - Issue where marketing attribution is lost
- Attribution platform (add +/-)
 - Salesforce
 - Hubspot
 - DataOS + PowerBi Dashboard
 - DataOS + SFDC Dashboard
 - 3rd Party Vendor

Key Questions: Lead Process

Proposed Statuses (from Jen's Doc):

- New = Freshly created lead, not yet contacted.
- Marketing Qualified Lead (MQL) = Meets marketing criteria, ready for Sales.
- Sales Accepted Lead (SAL) = Converted into Account, Contact, and Opportunity, or matched with existing records.
- Sales Rejected Lead = Rejected by Sales; consider adding a “Rejected Reason”.
- Auto-Qualified for Sales = Meets lead scoring threshold, assigned directly to Sales.
- Unqualified = Doesn't meet necessary criteria (e.g., wrong industry, competitor, etc.).
- Duplicate = Identified as a duplicate lead.
- New Status ideas sparked by Christina's recent request:
 - Nurture = When a lead is a good fit but not ready for sales. Marketing to nurture until it qualifies.
 - Recycled = Lead that was previously disqualified or sent to Sales but has been returned to Marketing for nurturing.



Proposed Lead Process Definitions

New Lead/Contact Status	Definitions	Reporting Stage	Stage Owner
Unengaged	Cold name (no engagement with e.Republic content, programs or people)	Name	Marketing
Engaged	Person who has engaged with e.Republic (visited website, visited booth, etc...), but not enough to QL	Inquiry	Marketing
Qualified Lead	Lead or contact promoted to SDR or AE team with expectation of follow-up within SLA	MQL	SDR
Access Interest (Opp)	Lead or contact accepted by SDR or AE team and actively being worked	SAL	SDR
Converted	Terminal lead status after conversion to contact	N/A	N/A
Recycled	Lead or contact which either indicates no interest in immediate sales engagement OR completes the e.Republic follow-up best practice sequence without replying.	N/A or Recycled	Marketing
Unqualified	NEVER, EVER going to become a customer. Job Candidates, competitors, junk data, etc....	N/A or Unqualified	N/A
Partner	Current partner	N/A	Partner team?
Active Opportunity	Contact is associated to Open Opportunity	SQL	AE

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