## 1A. Funnel Design Simulation

| Stage | Definition | Upgrade Criteria | Owned By |
|---|---|---|---|
| Lead | Site visitor, form filled, ad clicked | Engages with a marketing touchpoint | Marketing |
| MQL | Matches ICP + downloads resource / attends webinar | Multiple engagements + matches ICP | Marketing |
| SQL | Requests demo / shows buying intent | Clear intent to purchase | Sales |
| Trial User | Signed up for free trial, incomplete onboarding | Has trial activity | Sales + CS |
| Customer | Purchase confirmed | Paid subscription | Sales |

# 1B. CRM Configuration Blueprint

## Core Data Fields to Track:

- Contact Name
- Company Name
- Email & Phone
- Lead Source (Ad, Event, Referral, etc.)
- Industry
- Lifecycle Stage
- Lead Score
- Last Touched Date
- Engagement Notes

## Automations to Implement:

- Auto-tag based on lead source
- Lifecycle stage auto-updates based on behavior
- Reminders for no follow-up in 48 hrs
- Instant sales alert for demo bookings

## Dashboard Views:

- Sales Rep View: Follow-ups due, response rate, active opportunities
- Growth Manager View: Conversion rates by funnel stage, campaign ROI
- CEO View: CAC trends, LTV trends, weekly funnel health summary