# Lead routing rules of engagement

Company: _____ Owner of this page: _____ Date: _____

A short document that says who owns which leads and what happens when something goes wrong. Fill it in with your team.

## 1. Scope and definitions

Say which leads this covers. Define MQL, SQL and each lead status in one line.

*Example, made up: Covers inbound Leads in Salesforce. An MQL is a lead that passes the score line. An SQL is a lead an SDR has accepted. Statuses: New, Working, Qualified, Unqualified.*

Ours:

## 2. Who gets the lead

List the rules in the order they run, most specific first. End with a fallback owner.

*Example, made up: Partner source goes to the partner managers. Companies above the enterprise line go to the enterprise team. Then by country. Anything else goes to the default queue, worked by the SDR lead.*

Ours:

## 3. Which system has the last word

Name the one system that sets the owner. Name any other that may change it, and when.

*Example, made up: The Salesforce assignment rule sets the owner on create. Nothing else changes it, except a manager on request.*

Ours:

## 4. Response and handoff

Give the first response target and the handoff acceptance target. Name who gets the escalation when one is missed.

*Example, made up: First response: within the target the team agreed. A handoff is accepted or returned by the end of the next working day. A miss goes to the SDR lead.*

Ours:

## 5. Leavers, holidays and after hours

Say what happens to a leaver's leads. Say what happens when a rep is away. Say what happens out of hours.

*Example, made up: A leaver's open leads go to the queue the same day. Away reps are skipped by the rotation. Out-of-hours leads wait in the queue for the first person in.*

Ours:

## 6. Change control

Say who may edit routing, what is checked after each change, and who is told.

*Example, made up: Two admins may edit routing. After every change they rerun the checks and post the result in the team channel.*

Ours:

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