

Predictive lead scoring will not fix missing context.

A practical model for turning sales conversations into better CRM signals, sharper segments and more relevant nurture journeys.



Lead Scoring

Personalisation

Sales Alignment

Illustrative framework using synthetic examples

Marketing sees what happened. Sales hears why.



What marketing sees

Email opens
Clicks
Page visits
Form submissions
Webinar attendance



What sales hears

Budget is frozen
Timing is wrong
A stakeholder is missing
Trust is not there yet
A competitor is preferred

**The gap is not more activity data.
It is missing decision context.**

Turn free text into a small, structured signal.

Do not replace call notes. Add five fields that make the insight reusable.

1

Decision barrier

Budget, timing, authority, fit, trust, competitor or no response

2

Signal source

Sales call, form response, behaviour or customer service

3

Confidence

Explicitly stated, strongly inferred or weakly inferred

4

Last updated

A dated signal prevents old context from driving new communication

5

Next best action

Nurture, sales follow up, proof, stakeholder content or pause

Rule: capture only what the customer actually said or clearly signalled.

One barrier. A different next conversation.

BUDGET

ROI case, calculator, phased option

TIMING

Pause, reminder and event based re entry

AUTHORITY

Executive brief and stakeholder proof

TRUST

Customer evidence, security and implementation detail

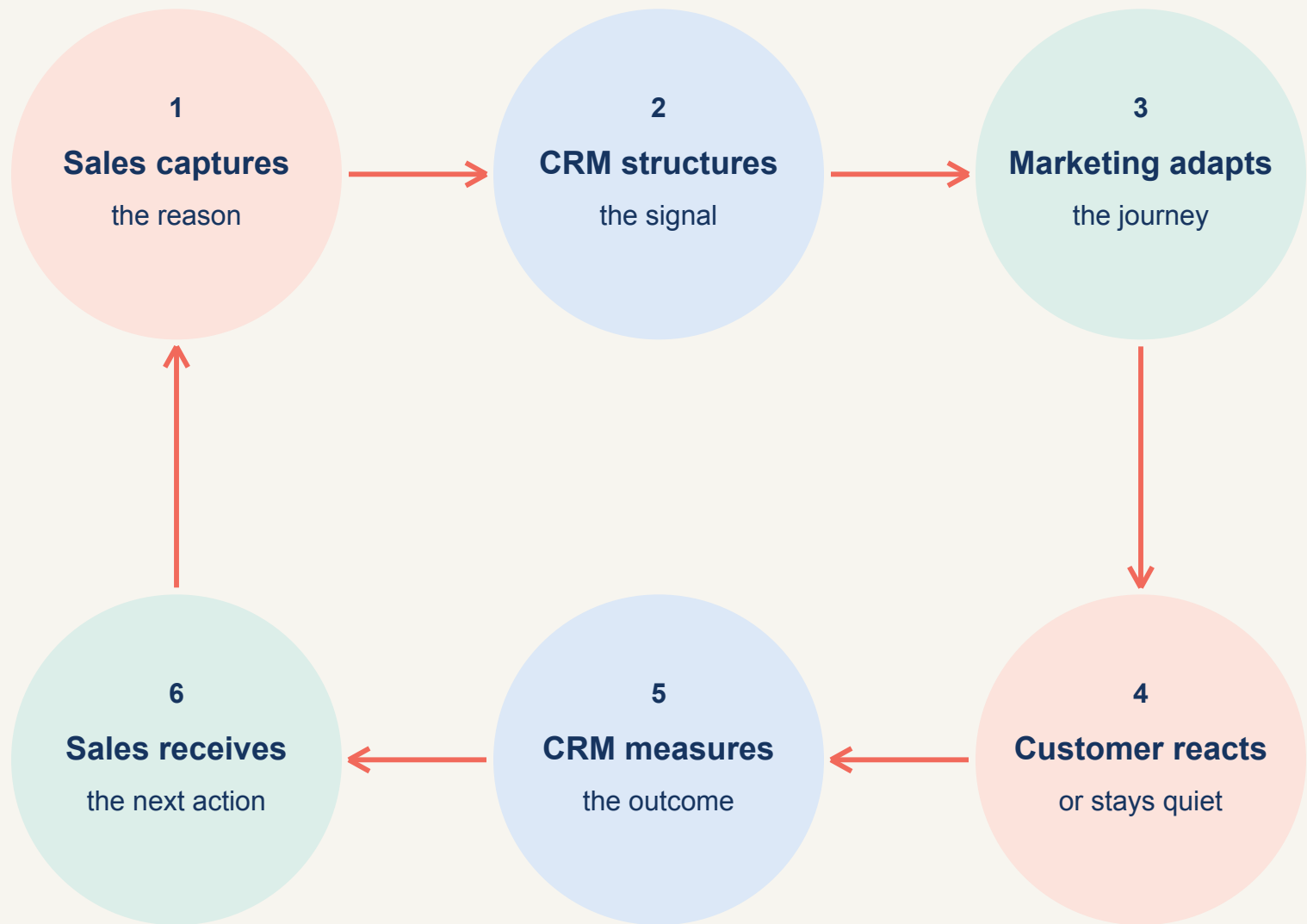
FIT

Use case education or respectful disqualification

Personalisation is not inserting a first name.

It is responding to the real reason for hesitation.

A useful signal must travel both ways.



That is the closed loop.

Without it, scoring becomes a one way guess based on activity.

Start transparent. Add prediction after the data is trustworthy.

A practical baseline should explain why a lead is prioritised.

Profile fit 30 pts



Role, market and use case

Intent 30 pts



High value behaviour, not every click

Barrier readiness 25 pts



Can the stated concern be resolved?

Recency 15 pts



Fresh signals carry more weight

Prediction comes later

First create labelled outcomes. Then test whether a model beats the transparent baseline.

Test the loop before rebuilding the stack.

WEEK 1

Define

Agree on 5 to 7 barrier categories and field ownership.

WEEK 2

Capture

Train Sales and review the first 30 labelled conversations.

WEEK 3

Activate

Launch three small nurture paths with clear suppression rules.

WEEK 4

Measure

Compare movement, replies, handovers and data completeness.

Watch four metrics:

Stage conversion

Reply rate

Sales acceptance

Signal completeness

The smarter CRM move is not always another email.

Sometimes it is creating a better signal between the conversation Sales had and the journey Marketing builds next.

A question for CRM teams

Does your CRM capture why an opportunity slowed down, or only that it slowed down?

LET'S COMPARE NOTES

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CRM | Email Marketing | Marketing Automation