

## Sales Systems / Lead Qualification

Define when and how a qualified lead moves from marketing (MQL) to sales (SQL) to opportunity.

Difficulty: Intermediate

Model: GPT-4 / Claude / Gemini

Use Case: Lead Management, MQL-SQL Handoff, Pipeline Management

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Why This Prompt Exists

Most marketing-sales handoffs are broken — leads get lost, follow-ups are late, and nobody knows who owns what.

You get:

- MQLs sitting untouched for weeks
- sales reps ignoring leads they didn't request
- no clear definition of what makes a lead "sales ready"
- leads getting passed back and forth
- no SLA between marketing and sales

But a lead handoff is not a handoff.

It is a service-level agreement between teams.

- MQL criteria: what makes a lead marketing qualified
- SQL criteria: what makes a lead sales qualified
- Handoff process: how and when leads transfer
- SLA: response time, follow-up requirements
- Feedback loop: why leads were rejected or accepted

Without a handoff protocol, leads fall through the cracks.

This framework forces AI to create a lead handoff protocol.

The Prompt

Assume the role of a revenue operations specialist who defines marketing-sales handoffs.

Your task is to create a lead handoff protocol.

Generate:

1. MQL CRITERIA (Marketing Qualified Lead)
  - Demographic fit (role, company size, industry)
  - Behavioral signals (content download, page visit)
  - Lead score threshold
  
2. SQL CRITERIA (Sales Qualified Lead)
  - BANT criteria met (Budget, Authority, Need, Timeline)
  - Sales accepted (converted from MQL)
  - Ready for demo or proposal
  
3. HANDOFF PROCESS
  - When MQL becomes SQL (trigger)
  - How lead is assigned to sales rep
  - Notification method (CRM alert, email, Slack)
  
4. SALES SLA
  - Response time (e.g., within 4 business hours)

- Follow-up requirements (e.g., 3 attempts within 5 days)
- Escalation if SLA missed

#### 5. FEEDBACK LOOP

- Why sales rejected an MQL (not qualified, wrong fit, duplicate)
- How marketing uses feedback to improve targeting

#### 6. HANDOFF DOCUMENTATION

- What information must be included when handing off
- CRM fields to complete

#### INPUTS:

Your Sales Process Stages:

[E.G., "Lead → MQL → SQL → Opportunity → Customer"]

Typical MQL Sources:

[FORM FILLS / CONTENT DOWNLOADS / WEBINARS / CHAT]

Sales Team Capacity:

[# OF REPS, HOURS AVAILABLE]

Current Handoff Pain Points:

[LIST OR "UNKNOWN"]

CRM System:

[INSERT]

#### RULES:

- MQL criteria must be specific and measurable
- SQL criteria must include BANT (budget, authority, need, timeline)
- Sales SLA: response within 24 hours minimum (4 hours is better)
- Feedback loop: sales must document why MQL was rejected
- Handoff must include all relevant information (pain, context, history)
- Review handoff protocol quarterly

#### How To Use It

- MQL criteria must be specific and measurable (not “interested lead”).
- SQL criteria must include BANT (budget, authority, need, timeline).
- Sales SLA: respond within 24 hours (4 hours is better).
- Feedback loop: sales must document why MQL was rejected (improves marketing).
- Review handoff protocol quarterly (what’s working, what’s not).

#### Example Input

**Your Sales Process Stages:** Lead → MQL → SQL → Opportunity → Customer

**Typical MQL Sources:** Demo request form, pricing page visit, case study download, newsletter signup

**Sales Team Capacity:** 5 BDRs, each handling 50 new leads/week

**Current Handoff Pain Points:** “Marketing sends leads that aren’t in our ICP,” “Sales takes 3+ days to follow up,” “No feedback on why leads were rejected”

**CRM System:** Salesforce

#### Why It Works

Most marketing-sales handoffs are broken.

This framework improves outcomes by forcing:

- MQL criteria (marketing accountability)
- SQL criteria (sales readiness)
- handoff process (systematic transfer)
- sales SLA (response accountability)
- feedback loop (continuous improvement)

Great lead handoffs don't lose leads — they transfer ownership with clarity and accountability.

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