

B2B HubSpot Automation & Lead Lifecycle Framework

Lead generation, scoring, nurture, and conversion systems

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Objective

Primary Objectives

- Improve lead quality and marketing-qualified lead volume
- Increase engagement across lifecycle-driven email programs
- Reduce manual follow-up through automation and governance
- Enable sales teams with clear qualification and handoff logic.

Strategy

- Strategy-first, not tool-first
- Behavior-driven automation over time-based blasts
- Modular workflows that can scale and be maintained
- Simple governance that internal teams can operate confidently.

Lead Sources & Entry Points

Inbound Sources

- Content and SEO-driven landing pages
- Webinars, events, and gated resources
- Website forms and inbound referrals.

Outbound & Affiliate Sources

- Targeted outbound email and sales outreach
- Events and industry partnerships
- Partner and referral introductions.

Lifecycle Stages

Lifecycle Structure

- Inquiry Qualified Lead (IQL): Initial engagement or data capture
- Marketing Qualified Lead (MQL): Demonstrated intent and engagement
- Sales Qualified Lead (SQL): Sales-ready based on score and behavior
- Customer or Partner: Converted and transitioned to post-sale lifecycle.

Key Focus

Lifecycle stages reflect readiness and intent, not just form completion.

Explicit (Fit-Based) Scoring

Industry

Healthcare, IT, Manufacturing (Target Industries): +10 points

Other industries: +5 points

Job Title/Role

Decision-makers (e.g., CEO, CFO, CBO, COO, CHRO): +15 points

Influencers (VP of HR, SVP HR, L&D VP, etc.): +10 points

Gatekeepers (HR Directors, L&D Directors, etc.): +5 points

Region

Target Region (e.g., Michigan for Olivet, Massachusetts for Regis, etc.): +8 points

Other relevant regions: +5 points

Company Size

5000+ employees: +10 points

1000-4999 employees: +7 points

<1000 employees: +5 points

Revenue

\$100M+: + 10 points

\$10M-\$100M: + 7 points

<\$10M: +3 points

Implicit (Behavior-Based) Scoring

Website/Landing Page

Multiple page views (B2B campaign page/quiz page/case study page, etc.): +5 for single view (up to +15)

Single page view: +2 points.

Email Engagement

Opens emails 3 times; +5 points; more than 3 times: +7 points

Clicks a link in an email: +10 points.

Replies to an email: +15 points

Unsubscribes: -10 points

Form Submission

Form submission (via landing page): +10 points

Webinar or event registration: +15 points

Meeting booked: +20 points

Implicit (Fit-Based) Scoring

Downloads

Downloads a case study or infographic or brochure: +10 points

Attends a webinar or event: +15 points

Views explainer video: +5 points

Social media engagement

Clicks on LinkedIn ad or posts: +5 points

Engages with LinkedIn post (likes/comments/shares): +8 points

Nurture drip email engagement

Opens nurture email: +2 points

Clicks nurture email: +5 points

Fills out a form from nurture email: +10 points

Lead Scoring Framework

Implicit (Behavior-Based) Scoring

- Email opens and clicks
- Website activity and repeat visits
- Content downloads, event attendance, and form submissions.

Signal	Points
Email open	+3
Email click	+7
Multiple email engagement	+10
Content download	+10
Webinar registration or attendance	+15
High-intent page visit	+10

Lead Scoring Framework

Negative Scoring

- Prolonged inactivity
- Low-intent behaviors
- Disqualification criteria.

Low job title (non-decision makers or influencers or gatekeepers, junior roles): -5 points

Bounce from the website/landing page (visits the site but leaves after only a few seconds): -5 points

Lack of engagement: No interaction in 30+ days: -10 points

Thresholds & Segmentation Logic

Segmentation Approach

- Score-based segmentation
- Behavior- and lifecycle-driven enrollment
- Dynamic list membership to keep workflows current

Sales Qualified Leads (SQL): 50+ points (these leads are highly engaged, meet score criteria, and are ready for personalized BDR outreach and qualification)

Marketing Qualified Leads (MQLs): 30-50 points (these leads show significant engagement but may need more nurturing before passing to sales.)

Low Scoring Leads (Nurture): <30 points (these leads need more engagement and nurturing. Drip campaigns should be triggered for further engagement.)

Nurture Architecture

Nurture Phases

- Initial Education: Problem framing, awareness, and relevance
- Value-Based Nurture: Credibility, outcomes, differentiation, and trust-building
- Conversion-Focused Close: Readiness signals, urgency, and next-step prompts.

Design Approach

- Modular workflows
- Behavior-driven progression
- Lifecycle-aligned messaging.

Automation Triggers & Workflow Logic

Primary Triggers

- Form submissions and data enrichment updates
- Engagement milestones and score changes
- Lifecycle stage movement.

Workflow Actions

- Enrollment and exit logic based on behavior
- Automatic lifecycle updates
- Sales assignment and task creation.

Sales Handoff & Governance

Handoff Criteria

- Clear, documented MQL to SQL thresholds
- Automated assignment rules
- Task creation and internal notifications (Teams/Zoom).
- When a lead reaches 50+ points, trigger an automatic task for respective BDR to follow up immediately with a personalized message/phone call.
- If a lead hits a certain behaviour (click, form submitted), assign a higher score and alert the contact owner.

Sample Workflow

