

The RevOps Funnel Handoff Audit

A lead reaches sales, but nobody knows who acts next. Agree on four decisions together, then save this page as your handoff record.

1. What makes a lead ready for the next team?

Write marketing's handoff criteria, sales' acceptance criteria, and who decides. Fictional example: requested a demo + fits target customer; sales confirms the need.

2. Where can both teams see the current status?

Name the shared record or connected tools, the fields to keep aligned, and who updates them. Note missing visibility before choosing a fix.

3. Who records acceptance, rejection and outcomes?

Name an owner, response time, reason field and review cadence. Include what happens when a lead is returned or needs more time.

4. What will you review, and when?

Record the actual metric, date range and source, plus one gap to test and its owner. Keep lead counts, opportunities and closed revenue distinct.

Review with both teams. This worksheet records an agreement; it does not guarantee pipeline or revenue growth. Keep customer details and confidential deal data out of shared copies.

Source: [HubSpot lifecycle stages](#) (checked 26 October 2026). Marketing and sales qualification are separate decisions; adapt the stages to your process.