

AGENTIC LEAD IQ.

Bringing marketing lead scoring into the AI age.

● THE PROBLEM

Lead routing is inefficient. Not all leads are created equal.

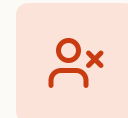
- **High-priority leads** get lost in nurture streams.
- **Resource misalignment** — sales chases cold leads while hot ones wait.
- **Low-priority leads** clog up sales and MDR queues.

THE COST OF INEFFICIENCY



Wasted sales cycles

Effort spent on unresponsive or low-fit leads instead of closing deals.



Missed opportunities

Qualified prospects lost to competitors due to delayed engagement.

● THE SOLUTION

A system that delivers two critical outputs.

01 

Conversion probability

A precise 0–100 score on the likelihood of a lead converting to an opportunity — grouped and labeled as A1, A2 and A3 leads.

02 

Textual surround

The story behind the score — a narrative explanation of why this lead matters.

● THE IMPACT

Smart, prioritized workflows. Route leads with confidence.

SEGMENT A · LOW & MEDIUM



Marketing nurtures

Calibrated outreach for this stage — brand presence without overwhelming cold prospects.

SEGMENT B · HIGH A1·A2·A3



Sales-ready

Highest probability and ideal fit. Route directly to account executives for immediate, personalized engagement.

PRIORITY RANKING	A1 Highest	A2 High	A3 Normal
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● HOW IT WORKS

Synthesize every available signal.

Person

- Persona — alignment to 100+ buyer personas
- Individual activity — webinars, downloads, events
- Channel interactions — PPC, tradeshow, email
- Demographic fit

Company

- ICP fit — propensity to convert
- Account activity — buying-group behavior
- Firmographics — industry, revenue
- External intent — predictive third-party data

Historical

- Sales conversions — by BU, team, line of business
- Channel conversion — last-touch rates

● THE MATH

Bayes' Theorem, with a feedback loop.

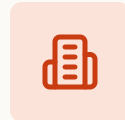
- 01 Bayes' Theorem combines all signals into one probability.
- 02 Updates probability with each new activity.
- 03 Applies weights and caps to each factor.
- 04 Prevents any single factor from skewing results.
- 05 Accuracy improves over time as new data flows back into the system.

CrewAI-powered teams, orchestrated by Prefect.



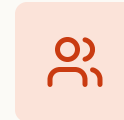
Person Enrichment

Reviews available info and enhances the profile with enrichment tools.



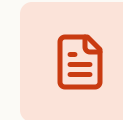
Company Enrichment

Enhances results through firmographic additions.



Persona Matching

Determines which existing personas match, and to what degree.



Report Generator

Creates the story behind each lead.

● BUILT TO SCALE

A practical, two-tiered system.

The full agentic process incurs inference and enrichment costs — you can't run it every time anyone does anything. So it runs in two tiers.



TIER 1 · ALWAYS-ON

- Pre-computed ML models
- Demographic & firmographic fit
- Initial “viability” filter
- Runs continuously at scale



TIER 2 · TRIGGERED

- Full agentic scoring process
- Activated at an activity threshold
- Generates final probability
- Creates the narrative story

● EXPECTED OUTCOMES

Faster cycles, higher conversion, better ROI — at scale.

When scoring is this precise, every team spends its effort where it actually pays off.

			
Sales velocity	Conversion rates	Marketing ROI	A scalable system
Reps focus on the highest-probability leads, shortening cycles.	Context-aware outreach drives higher engagement and success.	Smarter nurture and precise resource allocation maximize return.	Two-tier model applies AI economically — growth without linear cost.

● IN PRODUCTION

The Lead Intelligence dashboard — every lead, score to detail.

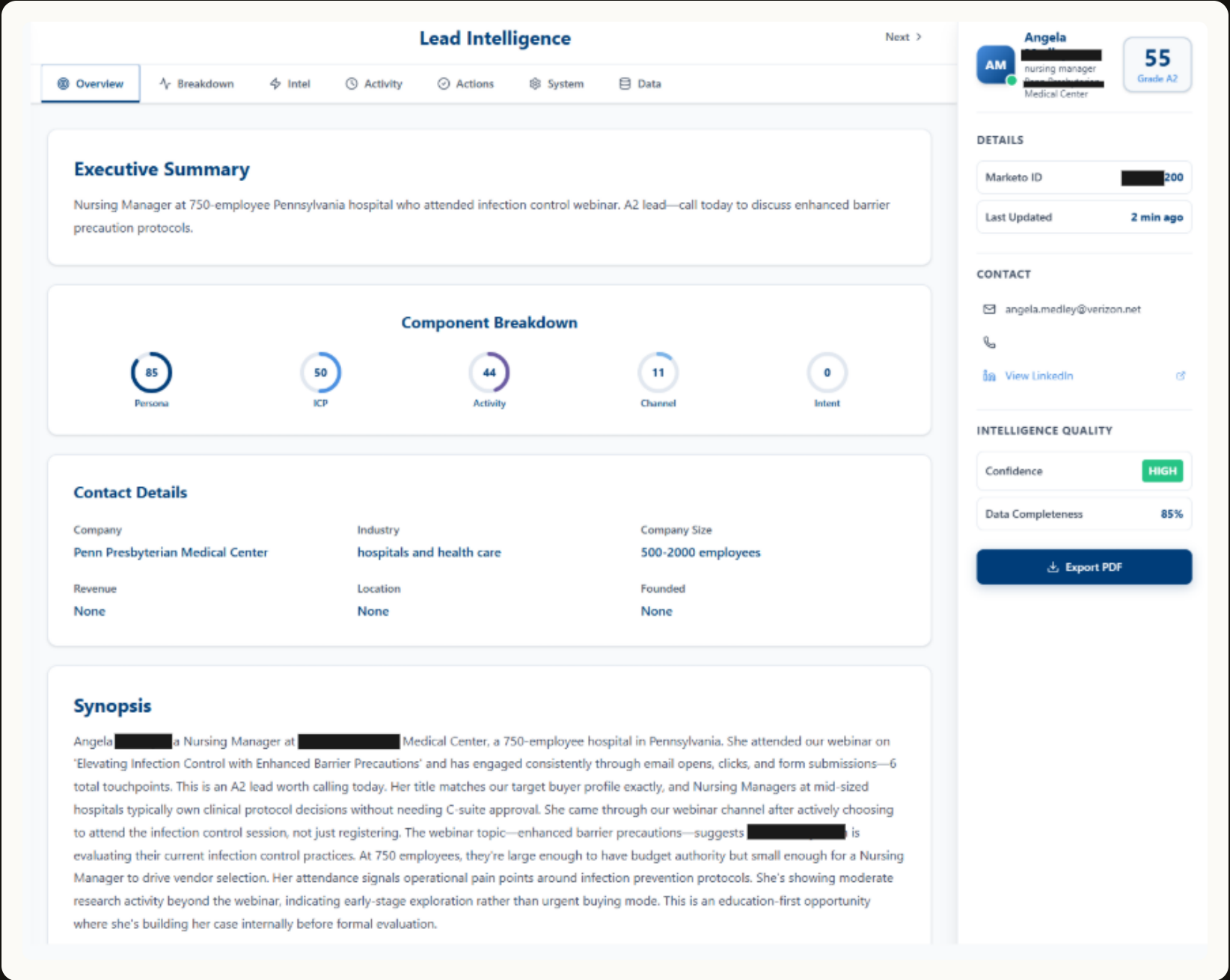
AI synopsis feature

The AI-generated summary appears automatically in the Comments section for every new marketing-sourced lead — instant context for reps on entry.

Automated MQL ranking

The predictive A1/A2/A3 ratings are stored in the MQL Rank field — enabling efficient prioritization and routing.

Data-science insight, **directly actionable** inside the CRM.



● IN PRODUCTION

Inside Salesforce, the synopsis does the briefing.

When a scored lead object lands in Salesforce — or any CRM — the whole record travels with it.

- Every field is right there: contact, interested product, MQL status and A1/A2/A3 rank.
- Reps have all the detail they need without leaving the lead record.
- The AI synopsis gives them the gist in seconds — who this lead is and why they matter.
- It names the play, too: the challenge, the entry point, and the next move.

Comments

- Call: [REDACTED] VALLEY HOSPITAL

- Email Address [REDACTED]d.com

- Phone Number: 209 [REDACTED]

- Job Title: Patient Financial Services Rep

- Interested Product: Eligibility Verification

This lead has been manually reviewed. | I want to be able to enter the patient's information and see if the patient has insurance coverage with any insurance companies. | Preferred Demo Date: 2026-01-12; Preferred Demo Time: 09:00; Demo Time Zone: America/Los_Angeles

AI Generated Synopsis:

[REDACTED] is a Patient Financial Services Rep at [REDACTED] Hospital District, a 750-employee hospital in California. She came to us through our website, indicating active research into revenue cycle solutions. This is an A1 lead—call immediately. The challenge: Otilia is staff-level, not the typical decision-maker we close deals with. However, [REDACTED] Hospital District fits our ideal customer profile perfectly. Your play here is to use Otilia as your entry point while quickly identifying the Director or VP of Revenue Cycle. Staff in patient financial services often feel the pain of inefficient processes daily—they're your best source of intel on current workflows, pain points, and who actually controls the budget. Ask her about their biggest billing headaches and who she reports to. Mid-sized hospitals like Oak Valley typically have 2-3 people involved in vendor decisions. Get introduced up the chain within the first conversation.

Marketo

MQL

True

MQL Subject

MQL - Last Interesting Moment: Requested more information via Request a Demo web form with preferred date & time. Interested Product: Eligibility Verification

MQL Rank

A1

● GET IN TOUCH

NICK PANAYI.

Veteran 2× CMO with 25+ years building and scaling high-performance marketing teams. I help organizations bypass the AI hype and evolve their marketing engines for the AI era.

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