

BRINGING MARKETING LEAD SCORING INTO THE AI AGE

Agentic Lead *IQ*

A structured engagement for forward-thinking marketing organizations ready to move beyond static scoring and into AI-native lead intelligence.

STRATEGY & MARKETING LEAD
Nick Panayi

TECHNICAL ARCHITECTURE LEAD
Chris Thomas

8–12 Week Engagement
Scoped to your
marketing stack complexity

— THE CHALLENGE

Your best leads are hiding *in plain sight*

Most B2B marketing organizations rely on point-based lead scoring built for a pre-AI world — rewarding form fills over real intent and routing leads to sales too early or too late.

01 High-priority leads misrouted to nurture A prospect who attends a webinar, opens three emails, and matches your ICP perfectly may never reach sales until it's too late.	02 Sales cycles lengthened by noise Without contextual intelligence, AEs spend time on leads that will never convert while conversion rates stagnate.	03 A damaged marketing–sales relationship Every poorly timed lead erodes trust. Eventually sales stops acting on marketing's leads altogether — and that's far harder to fix.	04 Reps need the story, not a number A number in a CRM field gets ignored. What drives action is a concise narrative — who this person is and why they matter now.
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— WHAT WE BUILT

A system we *developed and refined*

Agentic Lead IQ synthesizes every available signal about a person, their company, and your historical conversion data into a single, explainable output — in two forms.

01 Conversion Probability Score

A precise 0–100 score — Bayesian in nature, continuously recalibrated. Leads are grouped into A1 (highest), A2 (high), and A3 (normal) tiers for immediate routing decisions.

02 Textual Surround

The narrative behind every score — a human-readable synopsis that tells a rep why this lead matters and how to open the conversation, written automatically by AI and delivered into your CRM.

Three families of intelligence *feed the model*

PERSON SIGNALS Individual intelligence • Alignment to the personas that matter to your business • Individual activity levels • Channel interactions (PPC, email, events) • Demographic conversion propensity	COMPANY SIGNALS Account intelligence • ICP fit and propensity to convert • Buying group account activity • Firmographics (industry, size, revenue) • External intent data	HISTORICAL DATA Learned intelligence • Sales conversions by BU and team • Channel last-touch conversion rates • Bayesian recalibration over time • Self-improving feedback loop
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Three phases. Clear deliverables. *Real activation.*

We work alongside your team as embedded specialists — bringing the architecture, the methodology, and the team that built this system, so it's tailored to how you actually operate.

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PHASE ONE • WEEKS 1–2

Free

Discovery & Strategy

We map your stack, data infrastructure, and lead workflows — auditing existing scoring logic and interviewing key stakeholders to produce a definitive technical scope.

Stack audit

Stakeholder interviews

Data readiness

Scope document

II

PHASE TWO • WEEKS 3–9

Priced per scope

Build & Integration

Chris Thomas leads all technical work with your designated counterpart — building the Bayesian model, configuring the AI agent layer, and connecting output to the CRM.

Bayesian model

AI agent config

CRM integration

Two-tier architecture

III

PHASE THREE • WEEKS 10–12

Priced per scope

Activation & Handover

We go live together — parallel running, calibrating Bayesian weights, and training the full sales and MDR team. We hand over complete documentation and an operations runbook.

Live deployment

Score calibration

Sales & MDR training

Operations runbook

— OPTIONAL · START SMALL

Prove it with a *pilot*, then scale

Not ready to commit to a full build? After Phase One discovery, run a contained pilot that proves the scoring engine on your real data — before scaling to the complete model.

PHASE 1A · THE PILOT

- **Three inputs, not ten.** We build the scoring engine on your three highest-value signals rather than the full ten-signal model.
- **Proof on real data.** The pilot demonstrates that the approach works inside your actual stack — no theory, no slideware.
- **A clear path to scale.** Once it's proven, we expand from three inputs to the complete system with confidence.

OPTIONAL PILOT

\$10,000

per year

Three inputs · Real data · A clear path to scale

— ENGAGEMENT TIERS

Scoped to the complexity of *the marketing stack*

Pricing reflects stack depth, data maturity, and integration complexity. All tiers include the full three-phase engagement structure.

TIER ONE

Foundational

8 weeks · Standard stack

SUITED FOR

- Single MAP and CRM instance
- Up to 50K active contacts
- Standard data completeness
- One business line or segment

TIER TWO

Advanced

10 weeks · Complex stack

SUITED FOR

- Multiple MAPs or CRM environments
- 50K–250K active contacts
- Existing persona library to integrate
- Intent data vendor integration

TIER THREE

Enterprise

12 weeks · Enterprise stack

SUITED FOR

- Enterprise-grade integration complexity
- 250K+ contacts, multi-region
- Custom persona development included
- Full external data enrichment build

All engagements are scoped and priced individually following a complimentary discovery call — positioned as a fixed-fee deliverable or time-and-materials engagement. We're happy to walk through scope and pricing with your team directly.

— OPTIONAL · ONGOING PARTNERSHIP

Hand the system off — or *keep us on the team*

Managed retainer

We continue to run, monitor, and evolve the scoring model, delivering monthly performance reports and recalibration.

Advisory retainer

Light-touch quarterly check-ins, on-call technical support, and access to ongoing model improvements as the AI agent ecosystem evolves.

Client-side requirements

A true collaborative build. We are technical leads and architects — not a vendor delivering a black box. Four things are required from your team to execute.

<i>A</i> Cloud environment A working environment with a major provider (AWS, Azure, or GCP). We advise; you own the infrastructure — ensuring data sovereignty and independence.	<i>B</i> Stack access Admin-level API access to the MAP (Marketo, HubSpot, Eloqua) and CRM, plus read access to at least 12 months of historical conversion data for training.	<i>C</i> Technical counterpart A designated technical lead who collaborates directly with Chris Thomas, with working knowledge of the MAP and CRM environments.	<i>D</i> Stakeholder availability Marketing leadership and sales ops available for discovery and training. Sustained executive sponsorship is the single largest predictor of adoption.
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What changes *after activation*

01 Increased sales velocity Reps work the right leads from day one, reducing wasted outreach and shortening time-to-opportunity.	02 Higher conversion rates Context-rich outreach informed by AI-generated lead narratives drives more relevant first conversations.	03 Improved marketing ROI Smarter routing and precise nurture segmentation concentrate spend where it compounds.	04 A self-improving system Bayesian recalibration means accuracy compounds over time — the system gets smarter every cycle.
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ROI CALCULATOR

Model *your* return

☐ You enter ☒ Calculated for you

YOUR FUNNEL – PER MONTH

MQLs / month	300
MQL → Opportunity	8 %
Opportunities / month	24
Win rate (Opp → Close)	25 %
Wins / month	6.0
Average deal size	\$ 25000

THE LEVERS

MQL → Opportunity conversion lift BY MONTH 12 5 pts



Full lift reached at month 12, phased in from month 4. Recommended: +5 pts.

Project investment

\$50k

\$75k

\$100k

\$150k

\$ 100000

Fill in your funnel, drag the lift slider, and pick an investment level — the calculated rows and the results panel update live.

To see the interactive ROI calculator, click here →

PAYBACK PERIOD6.9moFIRST-YEAR RETURN4.7x



ADDED WINS / YEAR19ADDED REVENUE / YEAR\$469k

Conservative ramp: no lift in months 1–3, then the conversion gain climbs linearly to its full value by month 12. Payback and first-year return reflect this phased adoption; the bars show the mature monthly run-rate once the full lift is in effect.

Built by practitioners, *not* *theorists*



Nick Panayi

STRATEGY & MARKETING LEAD

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Senior marketing executive with a track record of building high-performance demand generation programs at scale. Nick drives the strategic and commercial side of every engagement — translating architecture into business outcomes.

- Engagement strategy and commercial structuring
- Discovery leadership and stakeholder alignment
- Change management and adoption planning



Chris Thomas

TECHNICAL ARCHITECTURE LEAD

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Chris is a seasoned GTM systems engineer and consultant with expertise in CRM, marketing automation, data architecture, and AI-enabled workflows. He drives the implementation and adoption of solutions, translating business requirements into high-impact technology deployments.

- Bayesian scoring model design and implementation
- AI agent orchestration (CrewAI + Prefect, or another suitable architecture)
- CRM/MAP integration & cloud infrastructure

— NEXT STEP

Start with a *conversation*

Nick and Chris will deliver a focused presentation that walks through the approach in full — yours to keep, share with your team, or take into your next conversation.

Nick Panayi

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