

The lifecycle stages *your ABM launch needs.*

A fill-in companion to the HubSpot Lifecycle Stage Guide. Run this worksheet with marketing and sales together. Get sign-off before you configure a single workflow.

BUILT ON 8 sources	SAMPLE 2,400+ B2B SaaS	FOR Mid-mkt & Ent.	UPDATED May 2026
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01 • HOW TO USE

Three sessions. *One worksheet.*

SESSION 1	Define stages — Marketing + Sales together. ~90 min. Complete pages 3–5.
SESSION 2	Set SLAs & owners — Add Ops + CS. ~60 min. Complete page 6.
SESSION 3	Pre-launch audit — Run the readiness check. ~45 min. Complete pages 7–8.

— *ABM programs fail before launch, not at execution. The CRM is loose: tiers aren't consistent, buying roles are empty, lifecycle triggers are unclear. The fix is boring — which is why it works.*

Set the *baseline*.

Fill these out before you touch the stages. These answers determine your SLA thresholds, your tier definitions, and your custom properties.

Company name	
Primary ICP segment	Mid-Market / Enterprise / Both
Typical ACV range	\$
Average sales cycle (days)	
Stakeholders per deal (typical)	
# of target accounts at launch	
CRM seat count (Sales + Marketing)	
Owns lifecycle config	RevOps / Marketing Ops / ?
Launch date (T-0)	___ / ___ / 2026

Same stages. *Different velocity.*

Tier accounts before stage rules. Tier 1 is your hand-picked list. Tier 2 is the broader ICP match. Without tiering, every account looks equal and your reps default to whoever replied last.

TIER	DEFINITION	ACCOUNT COUNT	SLA RESPONSE
TIER 01 Hand-picked	Named accounts. 1:1 personalization.	_____	_____ min
TIER 02 ICP match	Firmographic + intent fit. 1:few.	_____	_____ hr
TIER 03 Broader	Inbound demand gen. 1:many.	_____	_____ days

Eight stages. *Define every one.*

Each stage needs a trigger, an owner, and an SLA. Write them in. The two custom stages (Target Account Contact, SAL) are mandatory for ABM.

01. <i>Subscriber</i> [DEFAULT]	
Off-ICP or unknown account. Newsletter / blog opt-in.	
TRIGGER	
OWNER	
SLA	

02. <i>Lead</i> [DEFAULT]	
Known contact, ICP-adjacent. Form fill + firmographic fit.	
TRIGGER	
OWNER	
SLA	

03. <i>Target Account Contact</i> [CUSTOM]	
Contact's company is on the target list. Auto-tag ICP tier.	
TRIGGER	
OWNER	
SLA	

04. <i>MQL</i> [DEFAULT]	
Behavioral score threshold + ICP fit. 3+ high-intent events in 14 days.	
TRIGGER	
OWNER	

SLA	
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05. <i>SAL</i> [CUSTOM]	
SDR confirms fit and intent. Closes the marketing-sales handoff gap.	
TRIGGER	
OWNER	
SLA	

06. <i>SQL</i> [DEFAULT]	
Discovery booked + completed. MEDDIC / BANT criteria met.	
TRIGGER	
OWNER	
SLA	

07. <i>Opportunity</i> [DEFAULT]	
Active deal. Auto-set on deal-stage transition. Buying-committee map required.	
TRIGGER	
OWNER	
SLA	

08. <i>Customer</i> [DEFAULT]	
Deal closed-won. Lifecycle shifts to retention & expansion.	
TRIGGER	
OWNER	
SLA	

What *good looks like.*

Write your current conversion rate next to the benchmark. Anything more than 10 points below the mid-market column is your priority fix. Sources: Varos, First Page Sage, Optifai (N=939), SaaSHero.

TRANSITION	MID-MKT	ENT .	ELITE	YOURS
<i>Visitor > Lead</i>	2–5%	0.7–2%	8–15%	_____
<i>Lead > MQL</i>	35–45%	30–40%	50%+	_____
<i>MQL > SQL</i>	25–35%	18–25%	39–45%	_____
<i>SQL > Opportunity</i>	42–60%	38–55%	80%+	_____
<i>Opp > Closed-won</i>	25–39%	20–31%	30%+	_____
<i>MQL response time</i>	Max 24 hr	Max 1 hr	Max 5 min	_____

YOUR BIGGEST GAP

- Which transition is furthest below benchmark?

WRITE HERE

- What's the most likely root cause (scoring, routing, handoff, fit)?

WRITE HERE

- What's the one change that would move it 5 points?

WRITE HERE

Five quiet *failure modes*.

Mark each one HONEST. Anything checked needs a fix before launch.

-
- 01** Default definitions verbatim [] FINE [] AT RISK [] BROKEN
Defaults are starting points. Each stage needs a written trigger, owner, and SLA your team has signed off on.
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- 02** No target-account stage [] FINE [] AT RISK [] BROKEN
If a contact at a target account looks identical to a random subscriber, your ABM motion is invisible to the data.
-
- 03** Missing MQL to SAL handoff [] FINE [] AT RISK [] BROKEN
34% of qualified leads are lost between marketing and sales. SAL forces SDR acceptance before MQLs age out.
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- 04** Reporting at contact level, not account [] FINE [] AT RISK [] BROKEN
ABM measures account progression. With 8–13 stakeholders per enterprise deal, contact dashboards mislead.
-
- 05** Customer stage as a terminal [] FINE [] AT RISK [] BROKEN
Flattening Onboarding, Active, At-Risk, Expansion into one bucket creates a forecasting blind spot.

Run this before *day one*.

Mark each item READY, REVIEW, or GAP. Two GAPs at Target Account or SAL means delay launch. Two REVIEWS is acceptable for soft launch.

STAGE	WHAT TO CHECK	STATUS			ACTION OWNER
Subscriber	Newsletter opt-in workflow live	<input type="checkbox"/> READY	<input type="checkbox"/> REVIEW	<input type="checkbox"/> GAP	_____
Lead	ICP score property + form fill trigger	<input type="checkbox"/> READY	<input type="checkbox"/> REVIEW	<input type="checkbox"/> GAP	_____
Target Account	Custom stage created + ICP tier property + target list synced	<input type="checkbox"/> READY	<input type="checkbox"/> REVIEW	<input type="checkbox"/> GAP	_____
MQL	Behavioral score threshold validated with sales	<input type="checkbox"/> READY	<input type="checkbox"/> REVIEW	<input type="checkbox"/> GAP	_____
SAL	SDR routing workflow + 5-min alert + 24-hr auto-recycle	<input type="checkbox"/> READY	<input type="checkbox"/> REVIEW	<input type="checkbox"/> GAP	_____
SQL	Discovery checklist + MEDDIC/BANT criteria	<input type="checkbox"/> READY	<input type="checkbox"/> REVIEW	<input type="checkbox"/> GAP	_____
Opportunity	Deal-stage auto-set toggled ON in pipeline settings	<input type="checkbox"/> READY	<input type="checkbox"/> REVIEW	<input type="checkbox"/> GAP	_____
Customer	CS handoff workflow + sub-stage property	<input type="checkbox"/> READY	<input type="checkbox"/> REVIEW	<input type="checkbox"/> GAP	_____

LAUNCH READINESS

READY count	_____ / 8	REVIEW count	_____ / 8	GAP count	_____ / 8
Decision	<input type="checkbox"/> Launch on schedule <input type="checkbox"/> Delay 1 week <input type="checkbox"/> Delay 2+ weeks				

ABM-ready in *30 days*.

WEEK	PHASE	ACTIVITY	DONE
WEEK 1	Define <i>first</i>	Write trigger, owner, SLA for all 8 stages. Sales + marketing sign-off.	[]
WEEK 2	Build <i>in HubSpot</i>	Custom stages (Target Account, SAL). ICP tier property. Target-account list. Deal-stage auto-set.	[]
WEEK 3	Automate <i>handoffs</i>	SDR routing with 5-min alert. Auto-recycle for unaccepted MQLs at 24 hrs. Notification rules.	[]
WEEK 4	Soft <i>launch</i>	Launch one tier (10–25 accounts). Daily standup on SAL response time. Account-level dashboard live.	[]

Lock it *in*.

Three signatures. No launch without them. Skip this step and lifecycle definitions will drift inside two weeks.

HEAD OF MARKETING	Name	Signature	Date
HEAD OF SALES	Name	Signature	Date
REVOPS / OPS LEAD	Name	Signature	Date