REVENUE OPERATIONS & AI

What is a marketing-to-sales handoff? The interface where attribution breaks

A marketing-to-sales handoff is a dated release and acceptance interface. Name qualification, owner, SLA clock, exception, and outcome before measuring it.

Sinan Isoglu, MBA (Quantic)

Commercial growth leader, lecturer and doctoral researcher

PUBLISHED
6 September 2026

READING TIME
6 min

WORDS
1,382

https://isoglu.com/insights/journal/what-is-marketing-to-sales-handoff/

CONTENTS

MANAGEMENT SUMMARY

A marketing-to-sales handoff is a dated interface where marketing releases a qualified work object and sales accepts, returns, or holds it under explicit criteria. It is different from lead routing, attribution, sales development, and pipeline entry. This article uses bounded evidence from Biemans, Malshe and Johnson's systematic review, Sabnis et al.'s study of marketing-lead follow-up, and Terho, Salonen and Yrjänen's contextualized inside-sales study. It builds a synthetic handoff contract with release, qualification, acceptance, owner, response clock, exception, next event, and outcome fields, then states formulas for acceptance, response completion, and opportunity creation. The contract, denominators, and rows are author synthesis. They do not provide a universal SLA, conversion lift, attribution rule, or current lead result.

Keywords: Marketing-Sales Handoff · Lead Handoff · Marketing-Sales Interface · Service-Level Agreement · Qualification Rule · Response Latency

A qualified lead can disappear between two systems without either system reporting a technical error. Marketing records a release. Sales records a rejection, a first touch, or nothing. Later, a pipeline report treats the difference as a conversion problem or an attribution problem, even though the team never defined the interface between the two functions.

A marketing-to-sales handoff is a dated release and acceptance interface for a qualified work object. The handoff records what marketing released, what qualification rule applied, whether sales accepted or returned it, who owned the next action, when the response clock started, and what happened next.

The funnel-bottleneck article owns the missing follow-up boundary in a funnel. This page owns the cross-functional interface that makes release, acceptance, response, exception, and outcome distinguishable.

What does a marketing-to-sales handoff mean?

Use the terms for different objects:

Table 1 What does a marketing-to-sales handoff mean?

Object	Question it answers	Example record	Error when it is merged
Release	What work did marketing make available?	Qualified lead released at 09:04	A created record is mistaken for accepted work
Qualification	Why was the work eligible for release?	ICP, need, region, and consent rule	A later rejection is called a routing failure
Acceptance	Did sales accept responsibility under the rule?	Accepted by AE-Alpha at 09:30	Silence is counted as acceptance
Response	Was a qualifying first action recorded inside the clock?	Call or email with timestamp and purpose	Activity count becomes service quality
Exception	Why was the standard path not used?	Duplicate, out of territory, or missing field	Returned work disappears from the denominator
Outcome	What happened after the interface?	Opportunity, nurture, disqualification, or no record	Handoff is credited with a commercial result

Table from this essay. Sources and interpretation are given in the article.

Lead routing chooses an owner or queue. A handoff also needs a release condition and an acceptance condition. Attribution assigns credit across activities or channels. A handoff documents an operational boundary. Pipeline entry is a later state and should not silently stand in for acceptance.

What do the sales-marketing studies contribute?

Biemans, Malshe and Johnson's systematic review organizes the sales-marketing interface around structural linkages, role linkages, interactions, and perceptions. That scope supports treating a handoff as an interface with several observable parts. It does not establish one universal handoff standard or an outcome lift for a particular SLA.

Sabnis and colleagues study sales-representative follow-up of marketing-generated leads in a bounded sample. Their work makes follow-up behavior a measurable process question. It does not turn a follow-up rate into proof that marketing quality, compensation, or a handoff rule caused a later sale.

Terho, Salonen and Yrjänen distinguish inside-sales contexts by inbound or outbound orientation and by prospect or account focus. A handoff contract therefore needs to name the work context. An inbound prospect handoff and an outbound account-development task are not automatically the same population.

Which fields make a handoff reproducible?

At minimum, preserve:

- a stable handoff ID and the source record ID;
- release timestamp, qualification rule version, and release owner;
- acceptance, return, hold, or exception state with timestamp and reason;
- receiving owner or queue and the service-level clock definition;
- the first qualifying response event and its timestamp;
- next event, opportunity state, and observation cutoff;
- duplicate, consent, territory, capacity, and missing-field flags.

The active rule version matters because a current CRM rule cannot reconstruct what was eligible at the time of release. The observation cutoff matters because an open handoff is not yet a failed outcome.

What does a handoff worksheet look like?

The six rows are synthetic. They contain no lead, seller, customer, or current team record.

Figure 1 The synthetic marketing-to-sales handoff contract

ID	Release and qualification	Acceptance or return	SLA clock	Owner and exception	Next event and outcome	Disposition
H-01	Released; ICP, need, region, and consent pass	Accepted at 09:30	Starts at acceptance; response due in 24h	AE-Alpha; no exception	First response at 13:10; opportunity created	Included in accepted and response rates
H-02	Released; same rule version	Returned at 10:15	Clock stops on return	AE-Alpha; budget field missing	Marketing enriches record; no opportunity by cutoff	Return reason reported, not silent loss
H-03	Released; qualification passes	Accepted at 11:00	Response due in 24h	AE-Beta; capacity open	No qualifying response by cutoff; opportunity not created	Accepted, not response-complete
H-04	Held before release	Not handed to sales	No sales clock	Marketing queue; duplicate detected	Merged with existing record	Excluded from released denominator
H-05	Released; qualification passes	Accepted at 12:00	Response due in 24h	Fallback queue; territory exception	Response at 36h; opportunity created	Late response and exception retained
H-06	Released; qualification passes	Accepted at 14:00	Response due in 24h	AE-Gamma; owner reassigned	Response at 4h; disqualified after discovery	Accepted and response-complete, no opportunity

Author's synthetic handoff contract grounded in Biemans, Malshe and Johnson (2022), Sabnis et al. (2013), and Terho, Salonen and Yrjänen (2023). Fields, timestamps, and outcomes are illustrative.

H-02 is not the same as an unworked lead. It has a recorded return reason and a next enrichment step. H-05 is not a successful SLA case merely because an opportunity was created. Its late response remains part of the handoff record. H-06 shows why disqualification after acceptance is an outcome, not proof that the handoff failed.

Which rates can a team name?

Choose one denominator and state it in the metric name:

release coverage = released handoffs / eligible records × 100

acceptance rate = accepted handoffs / released handoffs × 100 response completion = accepted handoffs with first qualifying response inside the clock / accepted handoffs × 100

opportunity creation after handoff = accepted handoffs with an opportunity record / accepted handoffs × 100

In the synthetic worksheet, five records are released, four are accepted, three receive a response inside 24 hours, and two create opportunities. That is 80% acceptance among releases, 75% response completion among accepted handoffs, and 50% opportunity creation among accepted handoffs. These are properties of the illustrative rows, not a benchmark.

The team must also choose whether a returned handoff can be released again, which release timestamp starts the clock, whether reassignment resets the clock, and how open handoffs are censored. Without those choices, the same record can be counted as a late response, a return, and a new handoff.

What is a handoff not?

A handoff is not:

- a lead score or a qualification model;
- a routing rule by itself;
- a marketing attribution model;
- a promise that sales will create pipeline;
- a universal response-time benchmark;
- evidence that one function caused the other function’s outcome;
- a substitute for consent, territory, duplicate, or capacity controls.

The interface can expose where work is released, accepted, returned, delayed, or lost from view. It cannot by itself explain buyer demand, seller performance, channel incrementality, or causal conversion lift.

How should a team review a handoff rule?

1. Declare the eligible population, release event, unit, and observation cutoff.
2. Version the qualification and acceptance criteria in the handoff record.
3. Separate release, acceptance, response, return, reassignment, and outcome events.
4. Preserve exception reasons rather than dropping returned or held records.
5. Define the SLA clock, pause rules, reassignment rule, and treatment of open records.
6. Report acceptance, response, opportunity creation, and disqualification with their own denominators.
7. Compare rules only after checking owner mix, capacity, territory, lead quality, and time period.

If acceptance rises while response completion falls, the interface may be releasing more work without adding capacity. If opportunity creation rises only after duplicate suppression changes, the denominator may have changed. If one owner has the best rate, inspect assignment and opportunity mix before calling it a seller or handoff effect.

A handoff is an interface record, not a victory lap. Name the release, the acceptance, the clock, the exception, and the next event before asking what the handoff contributed.

The lead-routing article narrows the next operational question to eligibility, assignment, capacity, and response.

Biemans, W., Malshe, A., & Johnson, J. S. (2022). The sales-marketing interface: A systematic literature review and directions for future research. Industrial Marketing Management, 102, 324-337. https://doi.org/10.1016/j.indmarman.2022.02.001

Sabnis, G., Chatterjee, S. C., Grewal, R., & Lilien, G. L. (2013). The sales lead black hole: On sales reps' follow-up of marketing-generated leads. Journal of Marketing, 77(1), 52-67. https://doi.org/10.1509/jm.10.0047

Terho, H., Salonen, A., & Yrjänen, M. (2023). Toward a contextualized understanding of inside sales: The role of sales development. Journal of Business & Industrial Marketing, 38(2), 418-432. https://doi.org/10.1108/JBIM-12-2021-0596

END OF ESSAY

HOW TO CITE THIS ESSAY

Isoglu, S. (2026, September 6). What is a marketing-to-sales handoff? The interface where attribution breaks. Sinan Isoglu. https://isoglu.com/insights/journal/what-is-marketing-to-sales-handoff/

KEEP READING

Revenue operations & AI

What is a product-qualified lead? Product use is not buying intent

https://isoglu.com/insights/journal/what-is-a-product-qualified-lead/

Revenue operations & AI

What are sales enablement metrics? Measure behavior change before activity

https://isoglu.com/insights/journal/what-are-sales-enablement-metrics/

Revenue operations & AI

Salesforce control starts with what managers can observe

https://isoglu.com/insights/journal/salesforce-control-starts-with-what-managers-can-observe/

Sinan Isoglu, MBA (Quantic)
Commercial growth leader, lecturer and doctoral researcher