



Algorithm for Lead Qualification and Proposal Personalization: A Scoring Model for Marketing Consulting Sales Funnels

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ABSTRACT: In contemporary marketing consulting, sales performance is increasingly determined by the quality of lead selection, the speed of interpreting behavioral signals, and the accuracy of adapting the commercial proposal to the client's request. Under conditions of increasing competition, growing complexity of the B2B customer journey, and rising costs of errors at the initial contact stage, traditional approaches to sales funnel management prove insufficient, since lead qualification and proposal personalization most often function as separate managerial procedures. This creates a gap between the assessment of lead potential and the content of the offer, reducing the relevance of the proposal, complicating contact prioritization, and weakening the funnel's conversion potential. The purpose of the study is to develop an algorithmic model that integrates lead qualification and proposal personalization into a unified logic of managing the marketing consulting sales funnel. The methodological basis of the study is a conceptual-analytical approach that synthesizes adaptive selling, lead scoring, the B2B customer journey, marketing automation, and predictive sales analytics. As a result, an integrated scoring model is proposed in which lead evaluation does not end with ranking but becomes the basis for the automated selection of the format, content, and depth of commercial offer personalization. The scientific novelty of the study lies in shifting from the isolated use of scoring as a prioritization tool to its interpretation as a mechanism for coordinating decisions throughout the entire sales funnel. The practical significance of the approach lies in its ability to increase offer relevance, optimize the allocation of managers' efforts, reduce losses at intermediate funnel stages, and improve the overall effectiveness of consulting sales.

KEY WORDS: lead qualification; lead scoring; proposal personalization; sales funnel; marketing consulting; adaptive selling; predictive sales analytics.

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INTRODUCTION

In contemporary marketing consulting, sales effectiveness depends increasingly less on the sheer number of generated leads and increasingly more on a company's ability to timely identify their actual value, correctly interpret behavioral signals, and transform those signals into a relevant commercial proposal (Wu et al., 2024; Salonen et al., 2024). This trend results not only from the digitalization of B2B communications but also from a deeper structural transformation of the client decision-making process itself: the modern customer journey is becoming longer, less linear, more information-intensive, and more sensitive to the content of each touchpoint. Under such conditions, sales in marketing consulting cease to be primarily a response to an already formed request and increasingly become a system of analytical client support, within which the quality of the decision is determined by how accurately a company can align lead characteristics, the lead's stage of readiness for interaction, and the format of the future proposal. For this reason, lead qualification and proposal personalization can no longer be treated as isolated operations: in the modern sales funnel, they form a single logical continuum, the coherence of which determines both the relevance of commercial communication and the overall effectiveness of the sales system.

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The relevance of this issue stems from the fact that, in marketing consulting, an error at the early stage of evaluating a potential client has a multiplicative effect. An incorrectly qualified lead not only reduces the probability of closing a deal but also leads to an irrational allocation of managers' time, distorts priorities within the funnel, increases communication costs, and weakens alignment between marketing and sales activities. At the same time, an overly standardized or insufficiently relevant proposal is especially critical in consulting, since the very nature of a consulting service presupposes a high degree of trust, intellectual value, and an expectation of an individualized approach even before the contract is concluded. Unlike standardized product markets, where consumers often rely on predefined product characteristics, decisions in consulting sales are shaped to a considerable extent by how accurately a potential client perceives the diagnosis of their problem and how appropriate the proposed solution is. Hence, it follows that consulting companies need more than simply generating new contacts or formally ranking leads; it is crucial to create a funnel management mechanism in which the evaluation of client potential is immediately linked to the choice of the level of argumentation, structure, depth, and form of the commercial proposal.

Despite the active development of research in the fields of lead scoring, adaptive selling, the B2B customer journey, marketing automation, and predictive sales analytics, the contemporary scholarly field still lacks an integrated approach that would directly connect lead quality assessment with the algorithm of proposal personalization within a unified sales funnel management model (Wu et al., 2024; De Keyser et al., 2025). Existing studies typically analyze separate links of this process: some focus on scoring indicators and lead prioritization, others on the behavioral aspects of adaptive selling, and still others on digital tools for personalization or interaction automation. However, the transition from the analytical assessment of a lead to a specific managerial decision regarding the content and configuration of the proposal remains insufficiently conceptualized. In other words, the scholarly literature describes quite well how to identify a promising lead and, separately, how to adapt communication, but it addresses much less thoroughly the question of how the results of qualification should algorithmically determine the type of proposal, its degree of detail, the intensity of argumentation, and the level of individualization. This gap is particularly evident in marketing consulting, where the value of a proposal does not exist outside the context of the client's specific problem, and where sales effectiveness largely depends on the seller's ability to interpret not only the formal parameters of the client company but also the strategic maturity of its request, its sensitivity to risk, its expectations regarding outcomes, and its readiness for transformational change.

Thus, the scientific problem lies not merely in improving separate lead scoring or personalization techniques, but in overcoming the divide between them as two independent blocks of the sales process. It is precisely this divide that reduces the systemic coherence of funnel management: qualification without personalization yields an analytically accurate but communicatively weak decision, whereas personalization without sound qualification risks becoming superficial adaptation without a proper justification of the offer's value. In this connection, there is a need for a model that would interpret the results of lead evaluation not as the final stage of prioritization, but as the initial condition for constructing the appropriate type of proposal. Such an approach makes it possible to reconceptualize scoring not only as a selection tool but also as a mechanism for coordinating managerial decisions throughout the entire sales funnel.

Given the outlined problem, the purpose of this study is to develop an algorithmic model that integrates lead qualification and proposal personalization to improve the effectiveness of the marketing consulting sales funnel. To achieve this purpose, the study is intended to synthesize scholarly approaches to lead qualification, scoring, adaptive selling, and proposal personalization; identify the key parameters for evaluating lead quality; substantiate the logic linking qualification results with the level of individualization of the commercial offer; and, on this basis, construct a coherent algorithmic model of sales funnel management. Accordingly, the central research question is how to build an algorithmic model that combines lead qualification with commercial proposal personalization to improve the performance of the marketing consulting sales funnel. It is expected that such integration will contribute to greater proposal relevance, improved contact prioritization, reduced losses at intermediate funnel stages, and a stronger overall conversion potential of the funnel.

In this context, the subsequent literature review should not only describe existing approaches to lead scoring and personalization separately, but, above all, identify the theoretical and applied foundations that enable their integration within a unified algorithmic model. Such integration may serve as the basis for a shift from fragmented sales management to a more coherent, analytically driven system of consulting interaction with the client.

LITERATURE REVIEW

In contemporary B2B sales, lead qualification is increasingly viewed not as an auxiliary technical procedure but as a core mechanism for improving the performance of the entire sales system. Its importance lies not only in its ability to separate potentially valuable contacts from less promising ones but also in enabling firms to allocate resources more accurately, set priorities more effectively, and reduce the likelihood of erroneous decisions throughout the sales funnel. As Wu et al. (2024) show, lead scoring has already emerged in the contemporary scholarly literature as a distinct research stream focused on evaluating lead quality, prioritizing leads, and examining the impact of corresponding models on sales performance. At the same time, the significance of lead qualification is not exhausted by the function of sorting contacts. In the actual logic of B2B interaction, it plays a more strategic role, as it provides

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the basis for aligning marketing activity with sales decisions, allowing companies to direct their efforts toward the opportunities with the greatest conversion potential. This is especially important for B2B markets, where the decision-making process is lengthy, multi-level, and dependent not only on the formal characteristics of the client company but also on behavioral, contextual, and organizational factors. For this reason, lead qualification should be regarded not merely as an initial stage of selection, but as a fundamental analytical process upon which the subsequent logic of client management throughout the sales funnel depends.

Lead scoring itself, as a tool for lead prioritization, has evolved over recent years from relatively simple rule-based schemes to more complex data-driven and machine-learning models that can capture a wider range of potential client characteristics and more accurately predict lead potential. According to the synthesis by Wu et al. (2024), traditional scoring models relied primarily on pre-defined criteria established through expert judgment, whereas more recent approaches increasingly integrate behavioral, firmographic, and digital signals to build more flexible and predictive evaluation systems. This trend is also confirmed by González-Flores et al. (2025), who demonstrate that the use of machine learning in B2B lead scoring enables more accurate lead prioritization, reduces decision subjectivity, and strengthens the validity of subsequent work with contacts. However, even with such methodological progress, most existing models still focus primarily on ranking or classifying leads, that is, on determining their relative value to the company. As a result, in the current state of research, lead scoring still functions predominantly as a tool of selection and prioritization, while its potential as a basis for determining the subsequent format of interaction, the architecture of the offer, and the level of proposal personalization has been explored only partially. This is where an important theoretical tension emerges: the system is already capable of assessing how promising a lead is, but it still does not sufficiently explain how this evaluation should be translated into a specific decision about subsequent communication.

The theoretical foundation of proposal personalization in B2B sales is largely connected to the concept of adaptive selling, in which the effectiveness of the interaction with a client depends on the seller's ability to adjust the content, style, and structure of communication to the buyer's situational characteristics. In the classic study by Weitz et al. (1986), adaptive behavior in sales is interpreted as the result of combining knowledge, motivation, and the ability to interpret environmental signals, which enables the seller to adjust behavior to the characteristics of a particular client. Developing this logic further, Spiro and Weitz (1990) conceptualize adaptive selling as the purposeful modification of sales behavior under the influence of information about the buyer and demonstrate that such adaptability is an important determinant of sales performance. Taken together, these approaches form a fundamental theoretical basis for understanding personalization not as a purely communicative technique but as a broader principle of aligning the sales decision with the client's individual characteristics. For the present study, this is of particular importance, as it allows proposal personalization to be interpreted not as an optional enhancement of the offer but as a logical consequence of a well-executed interpretation of the lead. In other words, within the context of this study, adaptive selling serves as the conceptual basis for substantiating that the content and form of the proposal should be determined not by a universal template, but by the parameters of a specific lead and the logic of its interaction with the company.

In the further development of this logic, proposal personalization in B2B sales appears not merely as a consequence of the seller's communicative flexibility, but as a practical embodiment of adaptive selling at the level of the content, timing, and mode of presenting the value proposition. This is precisely what Salonen et al. (2024) emphasize, showing that the relevance and timeliness of content along the B2B customer journey directly affect client engagement and, consequently, the subsequent outcomes of interaction with the company. Importantly, the authors do not support the assumption that there is a universally correct sequence of communication actions. Instead, they demonstrate that client preferences, sensitivity to the message type, and readiness for interaction vary by stage of the journey and individual context. For the present article, this conclusion is particularly significant, as it strengthens the idea that proposal personalization should rely not on a template-based format of adaptation, but on the prior interpretation of lead characteristics, behavioral signals, and position within the sales funnel. Thus, personalization in the B2B environment is not merely a matter of the offer's style or tone, but of properly aligning the timing, content, and form of the proposal with the actual situation of a particular client.

Further theoretical reflection on this issue requires turning to the concept of the B2B customer journey, which allows us to view interactions with the client not as a set of isolated contacts but as a holistic, multi-level, and dynamic process. Purmonen et al. (2023) emphasize that the B2B customer journey is iterative, includes not only purchasing stages but also usage stages, and unfolds through interactions among multiple participants within the client organization. Such a conceptualization is important for this study because it reveals the limitations of a linear view of the sales funnel, in which a lead is supposed to move sequentially from initial contact to deal closure. In reality, the assessment of lead quality and the subsequent formation of the proposal must take into account the complexity of the journey itself, the multiplicity of decision-making centers, the changing needs of the client, and the uneven readiness for interaction across different stages. This means that the logic of working with leads must be considerably more flexible than that implied by a simple sequential model of funnel management, and this is precisely why integrating lead qualification with the logic of offer personalization acquires not only practical but also conceptual significance.

In this context, the sales funnel should be interpreted not merely as a tool for tracking conversions but as a mechanism for coordinating decisions between the seller and the buyer within a complex B2B environment. De Keyser et al. (2025) show that B2B

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customer experience and the customer journey are shaped by the alignment of experience across several levels within the buyer organization and by interactions between organizations at different journey stages. This means that funnel effectiveness depends not only on the accuracy of initial lead selection but also on the extent to which the logic of the seller's subsequent actions aligns with the psychological, informational, and operational characteristics of the particular interaction. An important analytical conclusion follows from this: lead qualification and proposal personalization cannot be regarded as separate stages that exist one after another without a close internal connection. Within the contemporary B2B funnel, they must function as interrelated decisions that consistently support the client's movement toward decision-making while simultaneously reducing the likelihood of a communicative or strategic gap between the assessment of contact potential and the actual form of the commercial response to the client's request.

Further reflection on the integration of lead qualification and proposal personalization also requires considering the role of digital tools in ensuring the transition from recording data about a contact to managing interactions with that contact. In this regard, Järvinen and Taiminen (2016) show that marketing automation in the B2B environment enables the systematization of clients' behavioral signals, improves segmentation accuracy, and supports more relevant adjustments to subsequent communications. What is especially important is that automation in their approach is not reduced to the technical acceleration of marketing activities. Rather, it is considered an instrument for aligning content, contact timing, and the client's informational needs. For the present study, this means that technological infrastructure can serve as an intermediate link between the analytical evaluation of the lead and the practical formation of a personalized proposal. Thus, digital tools create the conditions under which the results of lead qualification do not remain isolated analytical indicators, but instead become the direct basis for the next managerial decision. This is where the possibility opens up for a shift from the descriptive use of data to their coordinating function within the structure of the sales process.

This logic is reinforced by studies devoted to the role of data and predictive analytics in contemporary B2B sales. Hallikainen et al. (2020) demonstrate that the use of customer big data analytics can enhance sales effectiveness by providing a deeper understanding of clients, their behavior, and patterns of interaction with the company. In turn, Habel et al. (2023) substantiate a theoretical model of predictive sales analytics adoption and show that such systems are valuable not only as means of forecasting outcomes but also as tools to support seller decisions under conditions of complex and uncertain client interactions. Taken together, these studies indicate that analytical models in sales are increasingly shifting from a purely descriptive function toward a function of coordinating actions, that is, they make it possible not only to assess a situation but also to determine the appropriate direction of the next step. For this article, this is of fundamental importance, since predictive analytics is considered not only a source of data for lead scoring but also a broader methodological foundation for constructing a model that links lead qualification to the decision on the format of the proposal. Accordingly, sales analytics here acquires significance not merely as a control or forecasting tool, but as a structural element of the logic of personalization.

At the same time, even in contemporary literature that actively develops themes of automation, analytics, and digital sales technologies, the integration of lead evaluation with the logic of proposal personalization remains insufficiently formulated as a coherent concept. Friess et al. (2024) show that innovative digital sales technologies can significantly affect the financial performance of B2B firms; however, this effect is contingent on how precisely the technologies are embedded in the sales process. Similarly, Rustholkkarhu et al. (2022) demonstrate that AI-empowered tools support the management of the B2B customer journey, but such studies primarily emphasize separate managerial activities rather than a direct algorithmic link between lead quality and offer structure. Thus, existing studies provide an important technological and conceptual backdrop for this topic, yet they do not offer a complete explanation of how lead scoring results should systematically translate into decisions about the type, depth, and degree of individualization of the commercial proposal. It is precisely this unresolved issue that creates the basis for substantiating the integrated algorithmic model developed in the subsequent sections of this article.

Thus, the analysis of the existing literature provides grounds for asserting that the contemporary scholarly field has already developed sufficiently advanced approaches to lead qualification, adaptive selling, the B2B customer journey, and digital sales support; however, these directions are developing predominantly as parallel rather than integrated components of a unified managerial mechanism. On the one hand, lead scoring makes it possible to assess lead potential and increase the accuracy of contact prioritization (Wu et al., 2024; González-Flores et al., 2025); on the other hand, adaptive selling and the customer journey literature convincingly demonstrate the need for variable, context-sensitive interaction with the client (Spiro & Weitz, 1990; Purmonen et al., 2023). Yet the connection between these two logics — that is, the transformation of lead qualification results into a formal basis for choosing the structure, depth, and level of individualization of the commercial proposal — has not yet received adequate conceptual elaboration. As a consequence, the literature lacks a model that interprets lead evaluation not as a completed stage of selection, but as the starting point for constructing a relevant offer within the sales funnel. It is this gap that necessitates the development of an integrated algorithmic model that combines lead qualification and proposal personalization into a unified logical continuum for managing marketing consulting interactions with the client.

Despite the considerable development of research in the fields of lead scoring, adaptive selling, the B2B customer journey, marketing automation, and predictive sales analytics, the existing literature still lacks a coherent conceptual and methodological

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explanation of how the results of lead qualification should be directly transformed into decisions concerning the format, content, and level of proposal personalization. Existing approaches focus predominantly either on evaluating and prioritizing leads or on adapting sales communication and managing the customer journey, while leaving the mechanism of their integration within a unified sales funnel management model insufficiently elaborated. This gap is particularly pronounced in marketing consulting, where sales effectiveness depends not only on the accuracy of selecting promising contacts but also on the company's ability to algorithmically link the assessment of client potential to a relevant offer architecture. Accordingly, the research gap of this article lies in the absence of an integrated algorithmic model that combines lead qualification and proposal personalization as interrelated elements within a single logical continuum for managing the marketing consulting sales funnel.

Thus, the conducted literature review shows that contemporary studies provide a sufficient theoretical basis for understanding the separate components of the future model — lead qualification, adaptive selling, personalization of interaction, the B2B customer journey, and digital sales support — yet they do not ensure their full integration within a unified analytical mechanism. Existing approaches explain how to assess lead potential, how to adapt communication to client characteristics, and how digital tools support the sales process, but the formalized transition from qualification results to the selection of a specific commercial proposal remains insufficiently elaborated. For this reason, further research requires not only a theoretical synthesis of these approaches, but also their methodological integration into a coherent model capable of linking lead quality assessment with the logic of offer personalization. Accordingly, the next section substantiates the methodological approach to constructing such an algorithmic model, identifies its key parameters, and explains the principle of integrating lead qualification with proposal personalization within the marketing consulting sales funnel.

METHODOLOGY

The study employs a conceptual-analytical design oriented toward model building, since its purpose is not the empirical testing of a separate hypothesis but the theoretical substantiation of an integrated algorithmic model of lead qualification and proposal personalization within the marketing consulting sales funnel. The theoretical foundation of the model is formed by a body of scholarly works devoted to lead scoring, adaptive selling, the B2B customer journey, marketing automation, and predictive sales analytics, which makes it possible to regard lead qualification as an analytical process of assessing contact potential, and proposal personalization as the adaptation of the content and form of the offer to the characteristics of a specific client. Within this approach, the model is used to integrate previously separate scholarly streams into a unified logic for managing sales interactions (Wu et al., 2024; Coltman et al., 2011).

The procedure for developing the model involved identifying its key components and establishing the functional relationships among them. The model structure includes four basic blocks: lead input parameters, the lead evaluation mechanism, the categorization block, and the commercial proposal personalization block. The input parameters include firmographic, behavioral, and contextual characteristics, as well as indicators of the client's readiness for interaction. The methodological logic of the model lies in interpreting lead evaluation as an analytical precondition for subsequently determining the structure, content, depth, and level of individualization of the proposal. The evaluation of the model is carried out through an analysis of its internal logic, its conceptual consistency with the literature, and its ability to explain the transition from lead qualification to proposal personalization within the sales funnel (Habel et al., 2023; Järvinen & Taiminen, 2016).

RESULTS

The first result of the study was the identification of the structure of the input parameters used to carry out lead qualification within the proposed model. The model includes four groups of variables: firmographic characteristics, behavioral signals, contextual features of the request, and indicators of the client's readiness for interaction. This structure makes it possible to take into account not only the formal profile of a potential client, but also the dynamics of their engagement, the content of their need, and the degree of their proximity to a decision to cooperate.

Based on these parameters, the model generates an integrated lead score that reflects the lead's relative attractiveness for the company. Within this logic, qualification is treated not as a one-time sorting of contacts, but as an analytical generalization of a set of signals characterizing the lead's potential. As a result, scoring functions as an intermediate mechanism for interpreting data, providing the basis for a subsequent managerial decision regarding the type of commercial interaction.

Table 1. Integrated model of lead qualification and proposal personalization

Model component	Core elements	Result of the stage	Managerial implication
Input parameters	Firmographic factors; behavioral signals; contextual characteristics of the request; readiness for interaction	Structured profile of the lead	Creates the informational basis for further evaluation

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Lead scoring	Aggregation of the identified parameters into an integrated lead score	General assessment of lead potential	Supports more accurate prioritization of leads
Lead categorization	Classification of leads into high-, medium-, and low-potential groups	Lead category (A / B / C)	Translates analytical assessment into an actionable decision format
Proposal personalization	Matching each lead category with a relevant proposal type and level of customization	Proposal type (P1 / P2 / P3)	Aligns the offer with lead quality, request complexity, and readiness level
Integrated decision logic	Sequential link between score, category, and proposal format	Coordinated transition from evaluation to commercial response	Reduces the gap between lead qualification and proposal design
Expected outcome for the sales funnel	Higher relevance of offers; better allocation of managerial effort; lower losses in intermediate funnel stages	Improved funnel efficiency	Strengthens conversion potential and overall sales performance

The second result of the study was the development of a mechanism for lead categorization and the corresponding logic of proposal personalization. Within the model, three main categories of leads are distinguished: high-potential, moderately promising, and low-potential. Each of these categories is determined not only by the overall scoring level, but also by the combination of request quality, level of engagement, and the degree of the client's readiness for further interaction.

For each category, the model provides a separate type of commercial proposal. High-potential leads correspond to a highly personalized strategic offer, moderately promising leads to a semi-personalized diagnostic proposal, and low-potential leads to a basic standardized or nurturing format. Thus, the model formalizes the link between lead evaluation and the level of proposal individualization, making qualification the foundation for selecting a specific commercial response format.

The third result of the study is the construction of an integrated model architecture that combines all previous elements into a single algorithmic framework. The general logic of the model follows the sequence: input parameters → lead scoring → lead category → proposal type. This means that data about the lead do not remain isolated analytical indicators but are directly transformed into decisions regarding the structure, content, depth, and form of the proposal.

Thus, the proposed model makes it possible to interpret scoring not only as a prioritization tool but as a mechanism for coordinating subsequent actions within the sales funnel. Its result is not merely the classification of contacts, but a formalized transition from assessing lead potential to selecting a relevant offer. It is precisely this kind of integration that provides the conceptual basis for a more holistic management of the marketing consulting interaction with the client.

Integrated Model of Lead Qualification and Proposal Personalization



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DISCUSSION

The proposed model demonstrates that lead qualification in marketing consulting should be based on a multidimensional assessment that encompasses not only the formal characteristics of a potential client, but also their behavioral signals, the context of the request, and the degree of readiness for interaction. This means that lead potential is not a predetermined or static attribute, but is formed as an analytically derived conclusion about the real potential for further cooperation. Such a result is consistent with contemporary approaches to lead scoring as a tool for increasing the accuracy of sales decisions and confirms that lead evaluation should perform not only a selection function, but also the broader function of coordinating actions within the sales funnel (Wu et al., 2024; Habel et al., 2023).

At the same time, the main significance of the proposed model lies in the fact that it directly links the result of lead qualification with the choice of the level of commercial proposal personalization, thereby transforming scoring into the basis for the next managerial decision. This makes it possible to interpret personalization not as a universal or equally appropriate practice, but as a differentiated mechanism whose intensity depends on lead quality, request complexity, and the client's position within the funnel. In theoretical terms, this approach expands the understanding of adaptive selling and the B2B customer journey, while in practical terms it creates the basis for a more relevant allocation of resources, improved offer quality, and reduced losses at intermediate stages of the sales funnel (Spiro & Weitz, 1990; De Keyser et al., 2025).

CONCLUSIONS

The study made it possible to substantiate an integrated algorithmic model within which lead qualification and proposal personalization are combined into a coherent mechanism for managing the marketing consulting sales funnel. The main results indicate that lead qualification should be based on a multidimensional system of parameters, that lead scoring should be interpreted not as the final stage of selection but as the basis for subsequent managerial decision-making, and that the level of proposal personalization should be determined by the lead category, the nature of the request, and the client's degree of readiness for interaction. The significance of the obtained results lies in deepening the understanding of lead scoring as a component of the broader logic of personalization and in providing a foundation for more accurate resource allocation, greater offer relevance, and reduced losses at intermediate funnel stages. Prospects for further research are associated with the empirical verification of the model, its adaptation to other B2B sectors, refinement of the weighting coefficients of lead parameters, and the application of machine learning for the dynamic improvement of scoring logic

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