PQL Free to Paid workflow

Traditional vs PLG

Traditional model	PLG model	
Lead generation through marketing & SDR prospecting	Lead generation through free trials and free plans + traditional means	PQL + MQL
We often have company information for the prospects	Users often use personal email addresses and mapping to companies becomes challenging	ID Resolution
We often customize our outreach based on Zoom Info and intent data	We need to customize our outreach based on users' product usage data	Product Signals
Prospects have to be educated and informed of product value	Users already understand many aspects of the product, having used it	SDR role
Prospects may or may not be technical	Users are often technical and knowledgeable	SDR training
Deal sizes are often larger, warranting more expensive customer acquisition cost (and human hours are justifiable)	Deal sizes are often smaller and customer acquisition cost must be lower. This means automation and tech assist becomes important	Automation

PQL + MQL

PQL Scoring

Aha moments
i.e. Value metrics

Usage Scoring
i.e. growth & consistency

Quota Scoring
i.e. "approaching limit"

MQL + PQL merging

Salesforce setup
i.e. user / contact / tenant

Identity Resolution
i.e. user to contact

ICP Scoring
i.e. technographic, demographic

Segmentation

Engagement scoring
i.e. marketing & sales

Quadrant segments
i.e. Tech assist, sales assist

Personalized outreach
Product help, Procurement help,
Navigate, Upsell

Identity Resolution

User to Contact

Name matching

Email matching

Heuristic vs Exact

User to Account

3rd Party Enrichment

Domain Matching

Heuristic vs Exact

Tenant to Account

Hygienic Product
Instrumentation

Salesforce Structure

Salesforce Cleanup

Product Signals

Snapshots

Usage of key features

User sophistication classification

Users & tenants within account

Growth Rates

Growth rate of key features over time

User sophistication over time

Users & tenants growth over time

Consistency

Consistency of usage for key features

Consistency of usage by sophisticated users

SDR Role

Support

Get users unstuck

Encourage usage streaks

Sales Assist
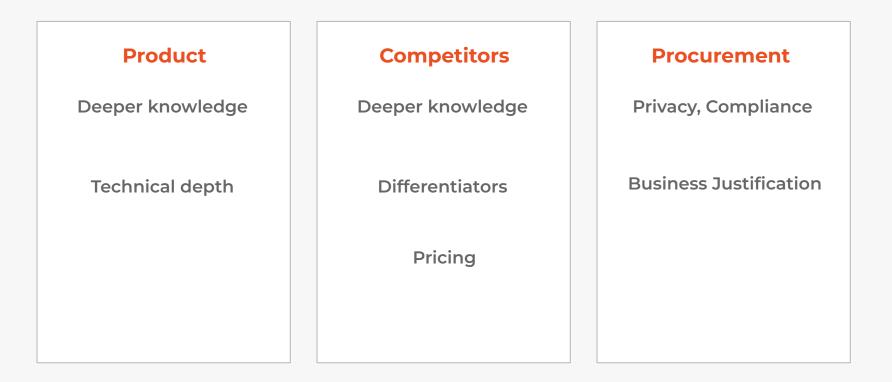
Help with purchase

Help navigate procurement process

Provide business justification

Close

Carry quota

Close deals or move to AEs

SDR Training

Product

Deeper knowledge

Technical depth

Competitors

Deeper knowledge

Differentiators

Pricing

Procurement

Privacy, Compliance

Business Justification

Automation

Contact Attributes

100x richer customer attributes

Live instead of snapshots

Segmentation

Fine grained segmentation based on attributes

Sync capability to Outreach, Hubspot, Salesforce

Auto-Outreach

100x Outreach sequences

Personalized to fine grained segmentation