



FIELD NOTES / FIELD NOTE / LEAD SCORING

Check What Your Lead Score Could Know

A practical input-timing check before testing a lead score.

WHAT YOU WILL DO

Fix the scoring moment, then keep only inputs whose values can be established at that moment. Treat missing history as unknown.



SOURCE



INSIGHT



APPLICATION

ARTICLE / FILLABLE WORKSHEET / SOURCE NOTES



Fix the moment of the decision

GTMA proposal: before testing a lead score for first-contact prioritisation, write down the exact moment the score would be used. Then check the value of every input as it existed at that moment. A field in today's CRM export is not, by itself, evidence that the same value was available when the lead arrived.

What the research tells us

In a 2025 Frontiers company case, González-Flores and colleagues report using CRM lead data generated between January 2020 and April 2024 and evaluating fifteen classification algorithms. That describes a data window and an evaluation approach. This selected finding does not establish when each input became available for each lead.

We are not alleging that the study used future information. The input check below is a GTMA proposal, not a method validated by this case or a promise of better conversion.

A fictional lead makes the distinction concrete

Fictional example: Maya wants to rank new enquiries at 10am, immediately after submission. The form records industry and company size at 10am. A demo happens at 4pm, and "demo attended" is added afterwards. Today's export contains all three fields.

For Maya's 10am test, she keeps the two submitted values and excludes the later demo outcome. If the company-size field has since changed and its earlier value cannot be reconstructed, she marks it unknown rather than substituting today's value. The resulting test must use the same input rules intended for that 10am decision.

Make an input decision before a model decision

Use the worksheet to record the ranking moment, each proposed input, its value at that moment and the record showing when it became available. Mark each input keep, exclude or unknown. If essential history is missing, pause the historical test and start collecting timestamped snapshots for a later evaluation. Keep sensitive lead records in approved systems.

A useful alternative is to score after the demo, when its outcome is available - but that is a different decision and needs a test designed for that moment. Clearing this input check establishes neither model performance nor business value, and does not approve a rollout.



Worksheet: inputs at the scoring moment

A GTMA proposal for deciding which inputs belong in a test. Reconstruct past values; do not substitute later information.

Type into the fields, or print. Save a copy to retain your answers.

01 / Define the ranking moment

Write the exact decision and when the score will be used. Example: rank a new enquiry immediately after its 10am submission.

02 / Trace each proposed input

Record the field, its value at the ranking moment and the dated record showing availability. Use approved systems; keep sensitive lead details out of this worksheet.

03 / Choose keep, exclude or unknown

Use a row per input. Explain the choice. Fictional example: industry submitted at 10am - keep; demo attended at 4pm - exclude from the 10am test; changed value without history - unknown.

04 / Resolve what stops the test

If essential history is unknown, pause the historical test and name an owner for timestamped snapshots. Or define a later scoring moment and a new test. This check alone does not approve a model or rollout.



Read further. Know the limits.

Source findings, GTMA proposals and fictional examples have different roles. Use the original research to examine its methods and context.

[1] The relevance of lead prioritization: a B2B lead scoring model based on machine learning

Frontiers in Artificial Intelligence / Published: 2025-03-07

González-Flores, Rubiano-Moreno and Sosa-Gómez (2025). Narrow company-case methods finding; not validation of GTMA's worksheet or a live-performance benchmark.

<https://www.frontiersin.org/journals/artificial-intelligence/articles/10.3389/frai.2025.1554325/full>

What the source supports

González-Flores, Rubiano-Moreno and Sosa-Gómez report using company CRM lead data generated between January 2020 and April 2024 and evaluating fifteen classification algorithms. The paper was published on 7 March 2025.

This is a narrow attributed company-case methods finding. It does not establish per-input availability at prediction time, live conversion improvement or a universal benchmark. We make no allegation that the paper used future information.

Scope and unknowns

The selected finding concerns one company's CRM lead data. It does not establish a sample size, geography or SaaS-specific population. The data-generation window is not a publication date or proof of each field's historical availability. Transfer to another company is unestablished.

GTMA proposal and fictional example

The ranking-moment check, keep/exclude/unknown choices and worksheet are GTMA proposals. The paper does not validate this instrument. Maya, the enquiry, times and field values are fictional.

Input timing is one boundary of a test. This worksheet does not establish model performance, business value or permission to deploy a model.

The worksheet is a GTMA proposal, not a research-validated instrument. Fictional examples are illustrations, not evidence of results.