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EDUCATIONAL GUIDE · SALES & CRM

Lifecycle Stages & Lead Statuses: The Complete Guide

Two fields in your CRM decide whether leads move or rot: the lifecycle stage, which maps the whole customer journey, and the lead status, which tracks what sales is doing right now. This guide explains both in detail, how they fit together, how to set them up, and what to automate.

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Version 1.0 · July 2026 · The one-page framework is the last page of this document, print it and pin it above the desk · Written for business owners and sales leaders, no CRM jargon assumed

1. The two dials, and why you need both

Every prospect in your business has two facts worth tracking, and they answer different questions.

How far has this person ever progressed with us? That is the lifecycle stage. It is the big picture: stranger, subscriber, lead, qualified lead, deal, customer, advocate. It belongs to the whole business and it only ever moves forward.

What is happening with this person right now? That is the lead status. It is the working note inside the sales process: new, attempting contact, connected, bad timing. It belongs to the rep working the lead, and it changes as often as the conversation does.

Our experience with this discipline predates the software. Back in the pre-Windows DOS era, Brett, our founder, used exactly this process to build sales processes for some of Australia's biggest companies. Green text on a black screen, and every prospect record carried the same two facts: how far the relationship had come, and what the next action was. Every business he has built or run since has used the same two dials to carry prospects through to customers, and customers through to advocates. The software has changed beyond recognition. The discipline has not.

> **THE CORE RULE**
>
> Stages move forward only, because they record the high-water mark of the relationship. Statuses move in any direction, because they record a live conversation. Confuse the two and your reports lie, your handoffs break, and warm leads quietly rot.

Most teams use the two terms interchangeably, and most CRMs let them. That is where nearly every broken pipeline we audit starts. The rest of this guide takes each dial in turn.

2. Lifecycle stages in depth

A lifecycle stage is a phase of the customer journey. The classic ladder has seven, and while the names vary between CRMs, the shape is universal. For each stage below: who they are, what triggers entry, who owns them, what they should receive from you, and what moves them forward.

1 Subscriber

MARKETING OWNS

Who they are Someone who gave you an email address. A newsletter signup, a webinar registration. Nothing more.

Enters when They opt in.

They get Regular, genuinely useful content. No pitch. You are earning the right to a second look.

Moves on when They engage with something substantive: download a guide, visit your pricing page, attend an event.

Where it goes wrong: pitching subscribers cold, or counting them in sales forecasts. A subscriber is a permission, not a prospect.

2 Lead

MARKETING OWNS

Who they are Someone showing real interest in what you sell, not just your content.

Enters when A meaningful action: guide download, pricing visit, event attendance, quote request.

They get Educational content matched to what they showed interest in, plus light profiling. Ask one or two more questions with each interaction rather than twenty up front.

Moves on when They meet your written fit and engagement criteria.

Where it goes wrong: passing every lead straight to sales. Reps burn hours on people who were never going to buy, then stop trusting the leads that would have.

3 Marketing Qualified Lead (MQL)

MARKETING OWNS

Who they are A lead that fits your ideal customer and is engaged enough to be worth a salesperson's time.

Enters when They cross a threshold you have written down: right industry and size plus a high-intent action, or a lead score you have agreed.

They get An offer to talk. An audit, a demo, a consultation. Something with a calendar link on it.

Moves on when Sales reviews them and accepts. That acceptance is the handoff line between the two teams.

Where it goes wrong: scoring on click volume instead of fit, and MQLs sitting unreviewed for days. Set a review SLA of one working day, then measure it.

4 Sales Qualified Lead (SQL)

SALES OWNS

Who they are	A prospect sales has looked at and said: yes, worth a conversation.
Enters when	A named rep accepts the MQL, or an inbound enquiry is qualified on arrival.
They get	Fast, personal contact. Speed is the whole game here: an inbound enquiry answered in minutes converts at a multiple of one answered the next day.
Moves on when	A qualified conversation turns into an active deal.

Where it goes wrong: no response-time SLA and no statuses. This is the stage where lead statuses switch on, and the next chapter lives here.

5 Opportunity

SALES OWNS

Who they are	An active deal. Demo booked, proposal out, terms under discussion.
Enters when	Both sides agree there is something to discuss: a scoped need, a budget conversation, a demo on the calendar.
They get	Proof. Case studies, references, a proposal that names their problem in their words.
Moves on when	Money changes hands or a contract is signed.

Where it goes wrong: confusing deal pipeline stages (discovery, proposal, negotiation) with lifecycle stages. The deal has its own pipeline; the person stays at Opportunity until they buy.

6 Customer

DELIVERY OWNS

Who they are	They have paid. The relationship most businesses stop tracking is the one that funds everything.
Enters when	First payment or signed contract.
They get	Onboarding that lands an early win, a regular review rhythm, and communication written for customers, never the acquisition campaigns they already answered.
Moves on when	They refer someone, leave a review, or agree to be a case study.

Where it goes wrong: marketing keeps blasting customers with buy-now campaigns because nobody updated the stage. It reads as not being known, and it costs renewals.

7 Advocate

WHOLE BUSINESS

Who they are	Customers who sell for you: referrals, reviews, testimonials, a name other buyers recognise.
Enters when	They act on your behalf without being paid to.
They get	Thanks, visibility, and involvement. Feature them, invite them in, make referring easy and worth their while.
Stays healthy when	You keep being generous. Advocacy is rented, never owned.

Where it goes wrong: taking advocates for granted, and never actually asking. Most customers who would refer simply have not been asked.

The three jobs lifecycle stages do

Segmentation. Each stage gets its own messaging. Leads get education, opportunities get case studies, customers get service. One list blasted with one message is how unsubscribes happen.

Alignment. The MQL-to-SQL handoff is the single most argued-about line in most businesses. A written definition of each stage ends the argument: marketing knows exactly when to pass a lead, sales knows exactly what it is receiving.

Reporting. Conversion rates between stages tell you where the funnel leaks. If MQLs convert to SQLs at 60% one quarter and 25% the next, something changed in lead quality or sales capacity, and you will see it in the numbers before you feel it in revenue.

> **WHY FORWARD ONLY**
>
> The moment a stalled deal gets dragged from Opportunity back to Lead, two things break. The history is destroyed, so nobody can see the relationship ever got that far. And the funnel report double-counts the journey, so your conversion rates become fiction. When a deal cools, the stage holds and the status changes. That is what statuses are for.

3. Lead statuses in depth

A lead status is a working note with one job: name the next action and its owner at a glance. Statuses switch on when a contact becomes an SQL and they describe the state of the sales conversation from then on. Before SQL, the field stays empty, and empty is information: it says this person has not entered the sales process.

STATUS	IT MEANS	NEXT ACTION & CADENCE	LEAVES WHEN
New	Just accepted by sales. Nobody has acted yet.	First touch inside your response window. For inbound enquiries, minutes matter; same day is the outer limit.	First outreach goes out → Attempting Contact.
Attempting Contact	Outreach going out, no two-way reply yet.	A structured cadence, written down and followed: call and message on day one, follow up day two, call again mid-week, vary the channel, roughly two weeks total.	They reply → Connected. Cadence exhausted → Nurture.
Connected	A real two-way conversation has happened.	Qualify properly: fit, need, timing, budget. Book the next concrete step before ending the call.	Deal opens → Open Deal. Wrong quarter → Bad Timing. Wrong fit → Unqualified.
Open Deal	It became an opportunity.	The deal pipeline carries the detail from here; the status simply says this person is in play.	Deal closes won → status archived. Closes lost → Nurture or Unqualified, with a reason.
Bad Timing	Right person, wrong quarter.	Park it with a revisit date and a note on what changes the timing. Check in when the date arrives, not before.	The date arrives or they resurface → Connected.
Unqualified	Wrong fit. A clear no.	Close cleanly with a one-line reason: too small, wrong industry, no budget authority. The reasons are market intelligence.	Terminal. Suppress from sales outreach.
Nurture	Recycled to marketing to keep warm.	A long-game campaign takes over: useful content on a slow drumbeat. The lifecycle stage stays exactly where it was.	They re-engage → back to sales as Connected, history intact.

The four status rules

SQL onwards only. A subscriber with a lead status poisons your reporting, because it counts people in the sales process who were never in it.

Statuses move freely. Connected becomes Bad Timing becomes Connected again. That movement is the record of a real conversation, and it is exactly what stages must never do.

Every status names an action. If a rep cannot tell what to do next from the status alone, the status is furniture. Delete it.

Keep the list short. Seven is plenty. Every status you add divides the team's attention and muddies the report. If two statuses lead to the same next action, they are one status.

What statuses give the sales manager

Statuses turn the pipeline into a diagnosis. A pile-up in Attempting Contact is a follow-up discipline problem. A pile-up in Connected is a qualification or closing problem. A growing Unqualified count with the same one-line reason is a marketing targeting problem, and now you can hand marketing the evidence instead of an opinion.

4. The two dials working together

Here is one contact moving through both dials, end to end.

WHAT HAPPENS	LIFECYCLE STAGE	LEAD STATUS
Signs up to the newsletter	Subscriber	empty
Downloads the buyer's guide	Lead	empty, still too early
Attends the webinar, fits the profile	MQL	empty
Rep reviews and accepts	SQL	New
Two calls, one email, no reply yet	SQL	Attempting Contact
Discovery call happens	SQL	Connected
Budget pushed to next quarter	SQL, the stage holds	Bad Timing, revisit date set
New quarter, they come back	SQL	Connected
Proposal goes out	Opportunity	Open Deal
Deal signed	Customer	archived, its job done
Refers two peers three months in	Advocate	—

Read the middle rows again. The stage never moved backwards, even when the deal went quiet for a quarter. The status carried all of that movement, and when the prospect came back, the relationship picked up where it left off with the history intact. That is the whole design.

5. Setting it up in your CRM

Every serious CRM supports both dials: HubSpot and GoHighLevel ship them as standard fields, Salesforce and most others model them easily. The setup work is not technical. It is agreement.

1. **Write the definitions down, together**
   One workshop, marketing and sales in the same room. Agree in writing: what makes a Lead, the exact MQL threshold, the SQL acceptance rule, and the response-time window for a new SQL. Every pipeline argument you have ever had traces back to these definitions living in different heads.

2. **Use the standard fields**
   Configure the lifecycle stage and lead status fields your CRM already has rather than inventing custom ones. Rename a stage only when your business genuinely lacks it, and keep the seven-stage shape.

3. **Automate stage transitions on behaviour**
   Form filled moves Subscriber to Lead. Threshold crossed moves Lead to MQL. Meeting booked moves MQL to SQL. Invoice paid moves Opportunity to Customer. No human should ever be the reason a lifecycle stage is out of date.

4. **Keep statuses manual**
   A status records judgement: was that a real conversation, is this bad timing or a bad fit. That call belongs to the rep, and making it is what keeps the pipeline honest.

5. **Wire the recycling loop**
   Nurture and Bad Timing must actually go somewhere: a marketing campaign for the first, a dated task for the second. A status with no follow-on process is a polite name for a dead lead.

6. **Set the ageing alerts**
   New older than one working day. Attempting Contact older than two weeks. Bad Timing past its revisit date. Each one pings the rep, then the manager. The clock is the alarm.

7. **Build three reports and review them monthly**
   Stage conversion rates (where the funnel leaks), stage velocity (how long people sit in each stage), and status ageing (which conversations have stalled). Twenty minutes a month on these three beats any dashboard subscription.

6. The classic mistakes, expanded

MISTAKE ONE · MIRRORING THE DIALS

A new subscriber gets a lead status of New because it felt tidy. Now every report that filters on lead status includes people who were never sales leads. Conversion rates collapse, reps chase people who only wanted a newsletter, and nobody trusts the numbers.

Fix: no lead status until SQL. Audit the database once: clear the status field on every contact earlier than SQL, and add a validation rule so it cannot happen again.

MISTAKE TWO · SKIPPING STATUSES ENTIRELY

The team runs on lifecycle stages alone. A deal stalls and there is nowhere to record it, because stages cannot move backwards. So someone drags the contact back to Lead, destroying the history, or leaves it at Opportunity forever, inflating the pipeline the board is looking at.

Fix: switch statuses on for everything SQL and later. Backfill the obvious ones (open deals, known bad-timing prospects), and let the rest resolve as reps touch them.

MISTAKE THREE · STATUS SPRAWL

Someone adds "Emailed twice", "Called, left voicemail", "Sent brochure". Eighteen months later there are 23 statuses, reps pick whichever is nearest the top, and the field means nothing.

Fix: every status must name a distinct next action. If two statuses share a next action, merge them. The activity log records what happened; the status records what happens next.

MISTAKE FOUR · CONFUSING DEAL STAGES WITH LIFECYCLE STAGES

Discovery, proposal, negotiation, closing: those are stages of a deal, not of a person. Rebuilding them as lifecycle stages means a lost deal forces the person's whole history backwards.

Fix: three layers, three tools. The person has a lifecycle stage. The conversation has a lead status. The deal has a pipeline of its own.

7. What to automate, and what to keep human

In the DOS days, keeping both dials honest took real discipline, because every update was a person typing at a prompt. Now the boring half runs itself, and the split is clean.

Automate the journey. Stage transitions are mechanical: a behaviour happens, the stage moves. This is exactly the work an AI Operating System takes on. It watches the behaviour, moves the stages, chases the reps when a status has sat still past its window, and drafts the follow-up message so the rep only has to make the judgement call.

Keep the conversation human. Status changes, qualification calls, and anything a prospect actually receives stays with a person, or at minimum behind a person's approval. The AI prepares; the human decides. It augments the sales team, it does not replace the conversation.

THE PAYOFF

The system remembers so your people can think. Every contact in the CRM answers two questions at a glance: how far have they come, and what happens next. No lead falls through the cracks, because there are no cracks left to fall through.

8. Implementation checklist

- [ ] Lifecycle stage definitions written down and signed off by marketing and sales
- [ ] MQL threshold and SQL acceptance rule agreed in writing
- [ ] Response-time window for new SQLs set and measured
- [ ] Stage transitions automated on behaviour, not memory
- [ ] Lead statuses live from SQL onwards, empty before
- [ ] Every status names a next action; the list is seven or fewer
- [ ] Nurture campaign and Bad Timing revisit tasks wired and running
- [ ] Ageing alerts set: New > 1 day, Attempting Contact > 14 days, Bad Timing past date
- [ ] Monthly review of stage conversion, stage velocity, and status ageing
- [ ] Nobody, ever, drags a lifecycle stage backwards

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Anaboo builds AI Operating Systems that augment established businesses. If your CRM cannot answer "how far have they come, and what happens next" for every contact, start with a **Free AI Audit at anaboo.ai**.

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Lifecycle Stages & Lead Statuses

The macro journey and the micro sales process, on one page.

Stages move forward only. Statuses move any way the conversation does.

The two dials of every sales pipeline · v1.0 · July 2026

THE MACRO DIAL · LIFECYCLE STAGES

how far has this person ever progressed with us?

1 Subscriber
Gave you an email address. Nothing more.
Forward: shows real interest.

2 Lead
Downloaded a guide, visited pricing.
Forward: meets your fit criteria.

3 MQL
Marketing says they fit and they are engaged.
Forward: sales accepts them.

4 SQL
Sales says yes, worth a conversation. **Statuses start here.**
Forward: an active deal opens.

5 Opportunity
Demo booked, proposal out, deal in play.
Forward: money changes hands.

6 Customer
Paid. Onboard, deliver, delight.
Forward: they refer or review.

7 Advocate
Refers, reviews, and sells for you.
Keep: thank, feature, involve.

MARKETING OWNS (1–3) · SALES OWNS (4–5) · DELIVERY OWNS (6–7)

THE MICRO DIAL · LEAD STATUSES

what is happening with this person right now? SQL onwards only, never before.

A status is the working note inside the sales process. It names the **next action and its owner** at a glance, and it can move in any direction as the conversation changes. **Before SQL the status field stays empty.** Empty is information.

New
Just landed on a rep's desk. Act today.

Attempting Contact
Outreach going out, no reply yet. Keep the cadence.

Connected
Real two-way conversation happened. Work these first.

Open Deal
It became an opportunity. Keep it moving.

Bad Timing
Right person, wrong quarter. Park with a revisit date.

Unqualified
Wrong fit. Close cleanly with a one-line reason.

Nurture
Recycled to marketing to keep warm. Stage stays put.

Keep the list short. Every status names an action. If it does not, delete it.

RULES OF MOVEMENT

- **Stages never go backwards.** They record the high-water mark of the relationship.
- **Statuses move freely.** Connected can become Bad Timing and back again.
- **Automate the stages** on behaviour. Meeting booked moves MQL to SQL, no human needed.
- **Keep statuses human.** They record judgement, and judgement belongs to a person.
- **Every move gets a note.** What happened, what is next, when.

Mistake one · mirroring the dials

A new subscriber gets marked "New" in lead status. Now sales reports count people who were never sales leads, and conversion rates are fiction. **Fix:** no status until SQL.

Mistake two · skipping statuses

A deal stalls, someone drags the stage backwards, the history is destroyed and the lead vanishes. **Fix:** stage stays put, status changes, lead recycles to marketing warm.