

IMPLEMENTATION

Plugging the 4:2 Method into your CRM

A 30-day rollout that fits Salesforce, HubSpot, Follow Up Boss, or Lasso — no rip-and-replace.

WEEK 1 · INSTRUMENT

Get the signals flowing.

- Confirm site analytics tracks: page views, session count, tool use, form fills, downloads.
- Map each event to one of the four zones (Relationship, Motivation, Dissatisfaction, Future Promise).
- Add four custom fields to the lead/contact object: R_score, M_score, D_score, FP_score.
- Add a fifth field: motivation_score_total (rollup, 0–100).

WEEK 2 · SCORE

Turn events into numbers.

- Build a nightly job (or Zapier/Make flow) that reads the last 14 days of events per lead.
- Apply the rubric: cap each zone at 25, sum for total.
- Write the four zone scores + total back to the CRM record.
- Add a 'Score changed by >10' trigger to fire a rep notification.

WEEK 3 · ROUTE

Get the right lead to the right person.

- Create three lead views: Call Today (70+), Follow-Up (40–69), Nurture (<40).
- Route 70+ leads to the best-matched rep by product line or geography, not round-robin.
- Set an SLA: 70+ leads contacted within 30 minutes of score change.
- Move <40 leads into an automated 21-day nurture with re-scoring at end.

WEEK 4 · COACH

Make it a team behavior.

- Add motivation_score_total to every call disposition screen — reps see it before they dial.
- Coach to the score: what did behavior say vs. what did the buyer confirm?
- Weekly review of overrides. Overrides are data, not exceptions.
- Retire manual lead grading. The score is the grade.

WHAT SUCCESS LOOKS LIKE AT DAY 60

- Every active lead has a live Motivation Score visible in one click.
- Reps open calls with a behavior-informed opener, not a generic script.
- First-touch response time on 70+ leads is under 30 minutes.
- Nurture-to-warm conversion is measurable and improving month over month.
- Managers coach to score movement, not activity volume.

WANT HELP?

Betcher Consulting Group runs 30-day implementations of the 4:2 Method with sales teams in home building, real estate, and high-consideration B2C. Reach out to talk through your setup.

The full picture: Motivation × Engagement × Fit

Motivation is chapter one. The complete triage score layers on Engagement (how warm to us) and Fit (should we invest). Use this after the 30-day rollout is stable.

WHY THREE SCORES, NOT ONE

A single score hides why a lead is hot or cold. Splitting into three lets you diagnose: high motivation but low engagement means they're shopping you silently — send a re-engagement play. High engagement but low fit means they love you but can't buy — protect rep time. High fit but low motivation means great match, wrong timing — long nurture.

MOTIVATION SCORE (M)

Why now? Range 0–100. Source: web + product behavior.

- Return visits, session depth, dwell on high-intent pages.
- Tool use: calculators, configurators, saved favorites, comparisons.
- Form fills and downloads — weighted only in the context of the above.
- Decay: subtract 5 points per week of inactivity so stale scores don't lie.

ENGAGEMENT SCORE (E)

How warm to us specifically? Range 0–100. Source: outbound + reply behavior.

- Email opens and reply rate (replies weigh 5x opens).
- Meetings booked, held, and rescheduled (no-shows subtract).
- Response speed — under 4 hours = +10; over 72 hours = -5.
- Channel diversity — engaging on 2+ channels signals real interest.

FIT SCORE (F)

Should we invest in this lead? Range 0–100. Source: CRM fields + qualification.

Fit is a weighted checklist, not a behavior read. Score each dimension 0–1, weight, and sum × 100. Suggested weights for a home builder:

Dimension	Weight	What earns full credit
Budget band	30%	Pre-qualified within your product's price range
Timeline	25%	Purchase intent within 6 months

Geography	20%	Inside your active community footprint
Product match	15%	Household size / stage matches available plans
Decision authority	10%	Contact is the decision maker or co-decider

Example: Budget 1.0 x 30 + Timeline 0.5 x 25 + Geo 1.0 x 20 + Product 1.0 x 15 + Authority 0.5 x 10 = **Fit 82**.

THE COMPOSITE TRIAGE SCORE

Combine as a weighted product, not a sum — a zero in any dimension should kill the score. Formula:

$$\text{Triage} = (M/100)^{0.5} \times (E/100)^{0.3} \times (F/100)^{0.2} \times 100$$

Motivation is weighted highest because it's the leading indicator. Engagement is the confirmation signal. Fit is the guardrail.

PLAY-BY-SCORE MATRIX

M	E	F	What it means	Play
High	High	High	Ready buyer, right lead	Call today, close the loop
High	Low	High	Shopping you silently	Personalized re-engagement email
High	High	Low	Wrong-fit fan	Kind qualification, don't over-invest
Low	High	High	Warm but early	Long nurture, education content
Low	Low	High	Right lead, wrong time	Quarterly check-in only
Any	Any	Low	Not a viable lead	Automation only, no rep time

This appendix is the workshop version of the framework. If you want a walk-through applied to your CRM and lead sources, reach out to Betcher Consulting Group.