PATRIY

Lead Scoring Framework

Intent, fit and recency: know who to call back first when you cannot follow up with everyone.

A Patriy Resources Guide

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About this guide

You cannot follow up with everyone, so your limited time has to go to the conversations most likely to become customers. This framework scores every conversation on three dimensions — intent, fit and recency — and explains why your inbox, not a separate CRM you have to feed by hand, is the right place to do it. For teams of one to teams of ten.

Lead scoring for teams of one: know who to call back first

You have 15 unread WhatsApp conversations. Three are existing customers with simple questions. Five are price shoppers who will probably buy from the cheapest option. Two are serious buyers ready to decide today. Five are "just looking."

You have 30 minutes before your next appointment. Who do you reply to first?

If you are a team of one — or a team of three doing the work of ten — this is the most important question in your business. Your time is the scarcest resource. Spending it on the wrong conversations is more expensive than any software subscription.

Lead scoring answers this question systematically. Instead of guessing, you score each conversation on three dimensions:

Intent: How close is this person to buying? "What is your price?" is low intent. "Can I pay now and pick up tomorrow?" is high intent. "I need 20 units by Friday for an event" is the highest.

Fit: Is this your ideal customer? Someone asking about a product you sell, in an area you serve, at a price point you offer — high fit. Someone asking about something you do not do — low fit, no matter how eager they are.

Recency: When did they last engage? A hot lead from three weeks ago is colder than a warm lead from three minutes ago. Time decays intent.

Patriy scores every conversation on these three dimensions automatically. Maya reads the messages, extracts the signals, and puts a score on the pipeline card. You open your pipeline and immediately see: these three conversations need your attention now, these five can wait, these two are probably not going anywhere.

This is not about being ruthless. It is about being realistic. You cannot give everyone your full attention. Lead scoring makes sure the people most likely to become customers get it.

A note on honesty: no scoring system is perfect. Maya's scores are based on patterns in the conversation, not magic. A low score does not mean "ignore this person." It means "this person is less likely to buy soon." Use the score as a guide, not a verdict.

The goal is simple: when you have 30 minutes and 15 conversations, you should spend those minutes where they count.

Your inbox is already a CRM — stop exporting it to another tool

Think about where your customer information actually lives right now.

It is in WhatsApp chats. The customer's name, what they asked about, what you quoted, whether they paid — it is all there in the message thread.

It is in Instagram DMs. The product they asked about, the price you gave, the "I will think about it" that needs a follow-up.

It is in your email. The formal quotes, the invoices, the complaints.

It is in your head. "That lady who wanted the blue one." "The guy from Tuesday." "Someone asked about delivery to Entebbe."

Your inbox is already a CRM. It has every field a CRM needs: contact identity, interaction history, deal stage, transaction records. The problem is not missing data. The problem is that it is scattered across five apps and one human memory.

Traditional CRMs solve this by asking you to do data entry. After every conversation, log into Salesforce, create the contact, log the activity, update the stage. This works for enterprises with dedicated sales ops teams. It does not work for a business owner who is also the receptionist, the accountant, and the delivery driver.

So the CRM goes stale. Contacts are half-entered. Stages are weeks out of date. The pipeline review shows deals that closed a month ago still sitting in "Proposal." The tool becomes another chore instead of a source of truth.

Patriy inverts the model. Instead of asking you to export conversations into a CRM, it treats the conversation as the CRM record itself.

When someone messages you: - Their contact is created or matched automatically - The conversation is logged with channel, timestamp, and content - Maya scores the lead based on intent signals in the messages - The deal appears in your visual pipeline at the right stage - When they pay, the transaction links to the contact and conversation

You never open a separate CRM. You work in your inbox, and the CRM builds itself underneath.

This does not mean traditional CRMs are useless. If you have a 20-person sales team with complex enterprise deals, you probably need Salesforce. But if your customers reach you on WhatsApp and Instagram, your CRM should start there too.

The best CRM is the one you do not have to feed. Because the one you have to feed, you will stop feeding.

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Conversations, CRM, sales, bookings and automation in one workspace — with Maya, the intelligence inside.

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