

AUTOMATE **Advanced** 45 MIN · UPDATED 2026-09-30

Score and route leads with a lead targeting agent.

Build a Copilot Studio agent that ranks inbound leads by conversion likelihood using CRM and behavioral data, and routes the best ones to reps automatically.

MICROSOFT 365

Excel

WORKS WITH

Copilot Studio

Business Outcome

Reps spend their time on the leads most likely to convert instead of working the list in the order it arrived.

Workflow Steps

Step 1: Learn what actually predicts conversion from your own data

Excel

Export historical leads with their known outcome (converted or not) into a Table, then use PivotTables to check conversion rate broken out by company size, engagement level, source channel, and response speed.

Find which of these actually correlates with conversion in your own data before assuming a generic lead-scoring signal (like "company size") applies to your specific business.

Step 2: Build the scoring agent

Copilot Studio

In Copilot Studio, have the agent score each new inbound lead against those validated signals and return a score with the specific factors driving it, not just a number.

PROMPT

Score this inbound lead's conversion likelihood based on company size, source channel, and engagement signals from the past week. State the score and the top 2 factors driving it, using our validated scoring model.

Step 3: Route by score, with a human checkpoint on the top tier

Excel

Auto-route high-scoring leads to the appropriate rep queue quickly, since speed matters for hot leads, but have a sales ops person spot-check top-tier routing weekly to catch scoring drift.

Step 4: Feed actual outcomes back into the model

Excel

Track whether scored leads actually convert and periodically re-validate the scoring signals against fresh outcome data — a model built on last year's patterns can go stale.

✓ Check the work

- Compare scored leads against actual conversion outcomes on a regular cadence to check the model's accuracy hasn't drifted.
- Confirm the stated "top factors" for a score are things actually present in that lead's data, not a generic explanation.
- Watch for the model overweighting one easy-to-measure signal (like source channel) at the expense of ones that actually matter more.



Expected Outcome

Inbound leads scored and ranked by likely conversion, automatically routed to the right rep or queue.

Want help rolling this out across your team? **Go to Liminals.Tech** ■