

LeanData Lead-to-Account Matching & Routing

A Revenue Orchestration Platform Maximizing the Value of Every Lead

Lead-to-Account Matching

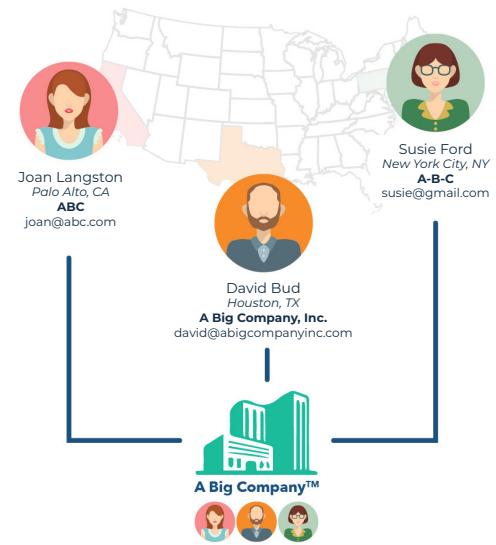
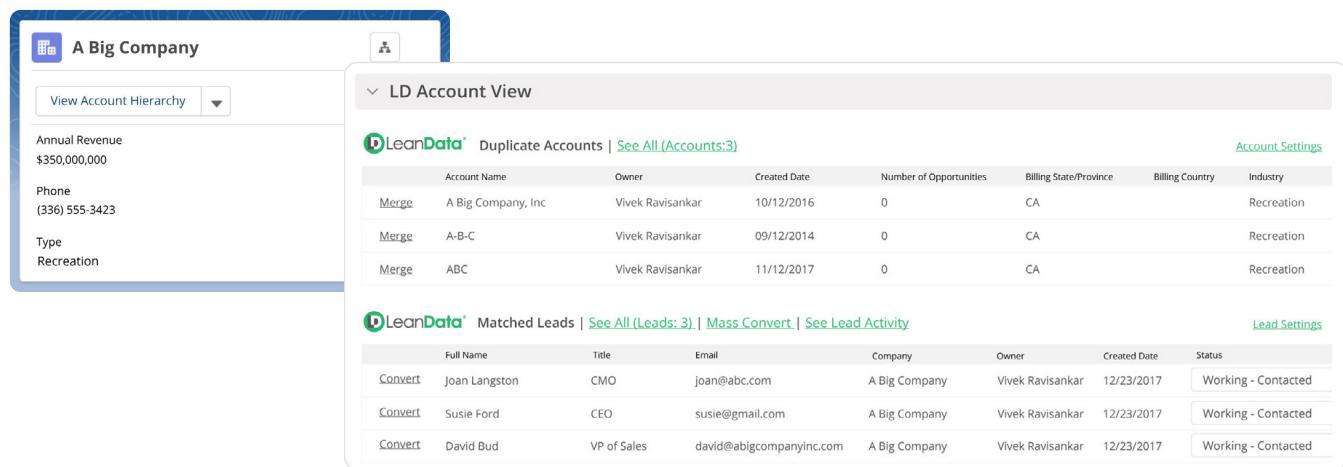
A MATCH MADE IN SALESFORCE

LeanData Lead-to-Account Matching is built upon a best-in-class fuzzy matching algorithm, connecting leads to accounts within a company's CRM. LeanData fuzzy matching is designed to look beneath the surface and match based on multiple fields beyond just basic email domains.

THE SOLUTION FOR QUICKER RESPONSE TIME

LeanData Lead-to-Account Matching allows your Sales and Marketing teams to immediately see results from accurate matching.

- ✓ Avoid multiple reps calling into same prospects, enhancing your delivered customer experience
- ✓ Empower Sales reps to spend more time engaging prospective customers rather than waste time on lead triage and account research
- ✓ Identify customer upsell and cross-sell opportunities

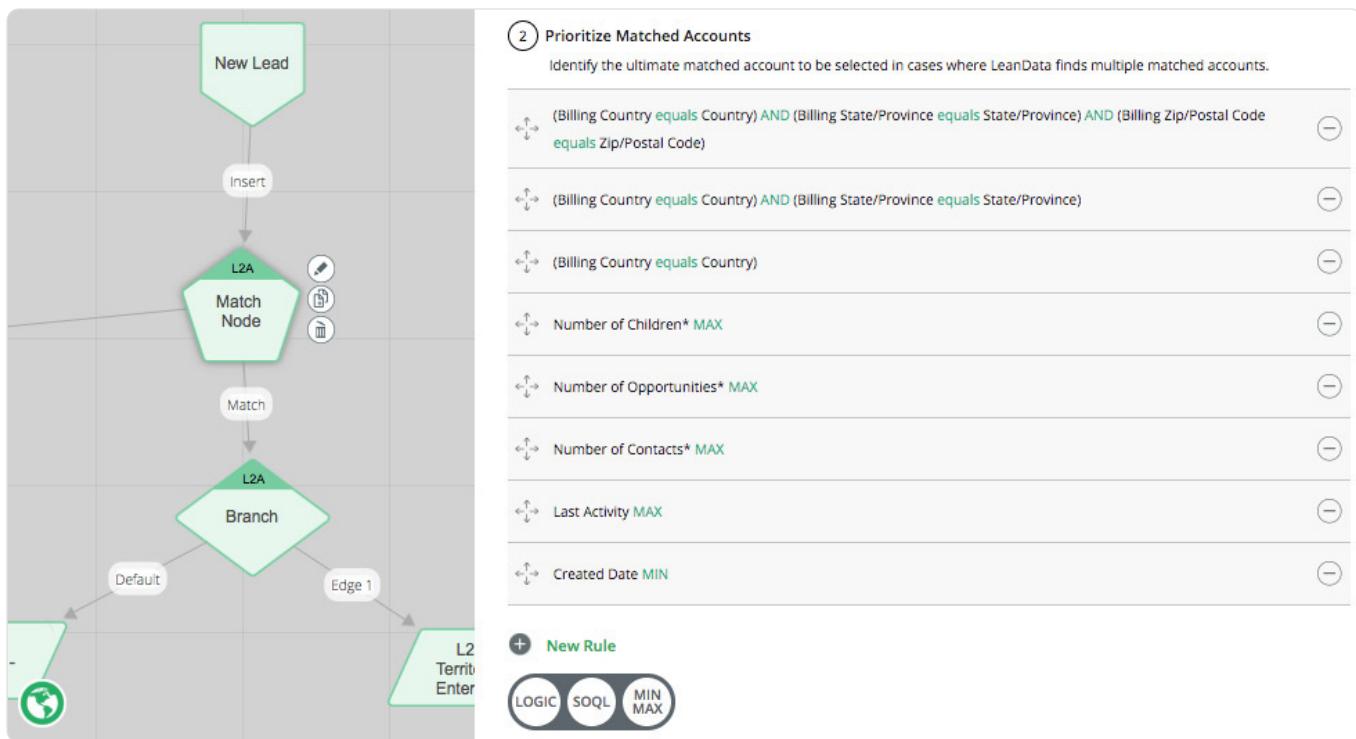
The screenshot shows the LeanData interface integrated with Salesforce. On the left, the standard Salesforce Account view for 'A Big Company' is shown, including fields for Annual Revenue (\$350,000,000), Phone ((336) 555-3423), and Type (Recreation). On the right, the 'LD Account View' is displayed, showing a table of 'Duplicate Accounts' found by LeanData. The table includes columns for Account Name, Owner, Created Date, Number of Opportunities, Billing State/Province, Billing Country, and Industry. The three leads from the diagram are listed as merged accounts: 'Merge' (A Big Company, Inc., Vivek Ravisankar, 10/12/2016, 0, CA, Recreation), 'Merge' (A-B-C, Vivek Ravisankar, 09/12/2014, 0, CA, Recreation), and 'Merge' (ABC, Vivek Ravisankar, 11/12/2017, 0, CA, Recreation). Below this, the 'Matched Leads' section shows the three leads (Joan Langston, Susie Ford, David Bud) with their details and status (Working - Contacted).

Full Name	Title	Email	Company	Owner	Created Date	Status
Convert Joan Langston	CMO	joan@abc.com	A Big Company	Vivek Ravisankar	12/23/2017	Working - Contacted
Convert Susie Ford	CEO	susie@gmail.com	A Big Company	Vivek Ravisankar	12/23/2017	Working - Contacted
Convert David Bud	VP of Sales	david@abigcompanyinc.com	A Big Company	Vivek Ravisankar	12/23/2017	Working - Contacted

CUSTOMIZABLE TIEBREAKERS & MATCH FIELDS

LeanData's fully customizable tiebreakers give you complete control over which account is the best match. This allows you to navigate complicated parent-child hierarchies as well as control for duplicate accounts.

Additionally, custom match fields improve matches by using additional fields — perhaps using data from an enrichment vendor — to determine potential matches. Automatically match leads to accounts when both records have an exact match on a specific field.



Lead Routing

THE RIGHT LEADS ROUTED TO THE RIGHT REP AT THE RIGHT TIME, EVERY TIME

As your company grows and scales, your growth plays tend to become ever more complex and misrouted objects in Salesforce become increasingly problematic.

Errors in routing — where leads, contacts, accounts and/or opportunities are assigned to the wrong representatives or simply lost in the system — create friction in your revenue team, decrease productivity and wreak havoc on Marketing return on investment (MROI).

Perhaps more importantly, routing errors result in poor buying experiences for your prospects and customers.

Your lead response time – aka, your speed to lead – is mission critical. Consider these speed to lead statistics:

78%

of customers buy from the company that responds to their inquiry first

(Lead Connect)

7X

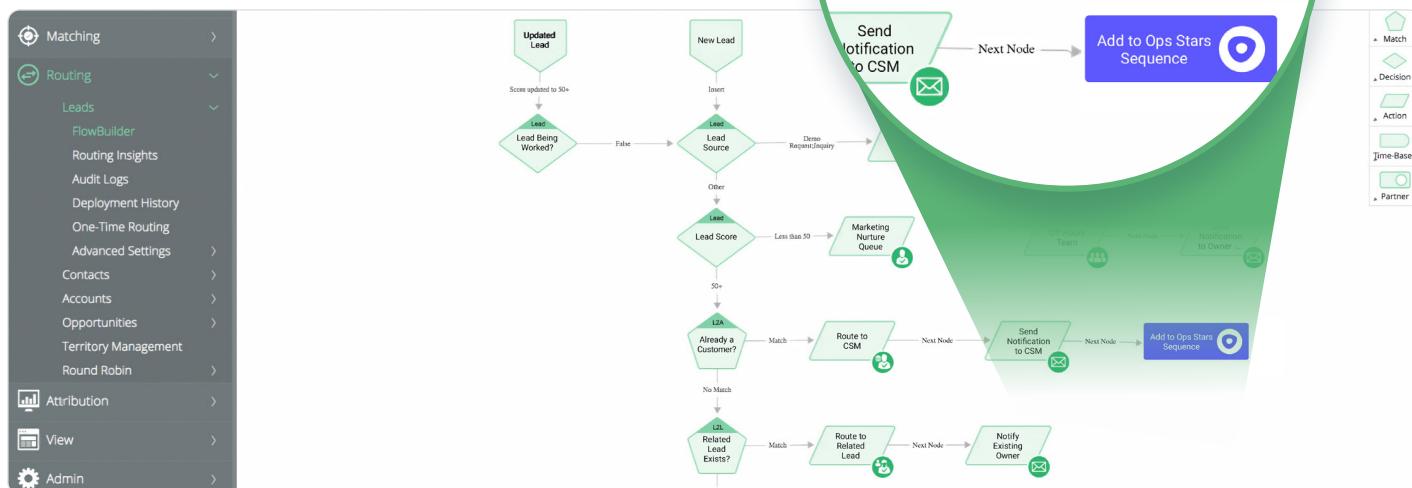
more likely to qualify leads when reaching out within an hour as opposed to just one hour later

(Harvard Business Review)

391%

increase in lead conversions when responding within one minute

(Velocity)



SPEED, WITH ACCURACY, WINS

A quick lead response time - aka, your “speed to lead” - requires leads to be correctly routed to the correct reps. When leads bounce back and forth within the Sales team, the one thing that for sure isn’t happening is engagement with prospective customers.

LeanData Routing ensures the right leads get to the right representatives as quickly as possible, every single time. Automating every manual lead routing process eliminates operational bottlenecks and human errors, and it ensures no lead gets left behind, either misplaced or completely forgotten.

Proven Results with Over 1,000 Customers







LEANDATA ROUTING IS THE GOLD STANDARD FOR YOUR SALESFORCE INSTANCE

LeanData Routing empowers your team to build, monitor and optimize custom routing flows for leads, contacts, accounts and opportunities. It enables you to maximize the full potential of your Demand Generation and create great buying experiences for prospects.

- ✓ **Co-Design Easily.** Use Visual FlowBuilder and its drag-and-drop interface to collaborate and deploy routing rules based on your business needs.
- ✓ **Optimize Continuously.** Monitor Routing Insights and SLA compliance in real time to improve sales efficiency and fine-tune your lead distribution process based on seasonal or strategic priorities.
- ✓ **Automate Salesforce Actions.** Eliminate manual errors by applying automated actions such as merging duplicates, converting leads to contacts, creating new accounts/opportunities, round-robin assignments, etc. Visualize engagement with each account and identify what's driving interaction.



Get Started Today:

[Request Demo](#)

Visit [LeanData.com](#) to learn more about LeanData's go-to-market operations solutions for Matching, Routing and Engagement, or visit us on [AppExchange](#).

Why LeanData?

Today's growth leaders power their B2B selling with LeanData, the gold standard in modern revenue orchestration and an essential element of the modern RevTech stack. The LeanData Revenue Orchestration Platform, powered by No-Code Automation, simplifies and accelerates coordination of all the plays, people and processes needed to transform buying signals into buying decisions. LeanData is inspiring a global movement among its 1,000 customers and community of 5,000+ Ops Stars worldwide, empowering them with revenue operations excellence that translates into compelling buyer experiences and competitive advantage. Join the movement!