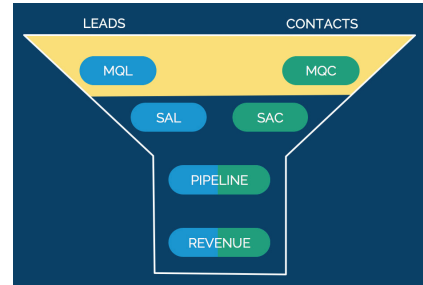


## Maximizing The Impact of Your Contacts

Leads are only one portion of your Demand Generation funnel. But most organizations under-utilize another important component: Contacts. If you think about your key target accounts, buying signals from these accounts are a combination of qualified leads as well as contacts.

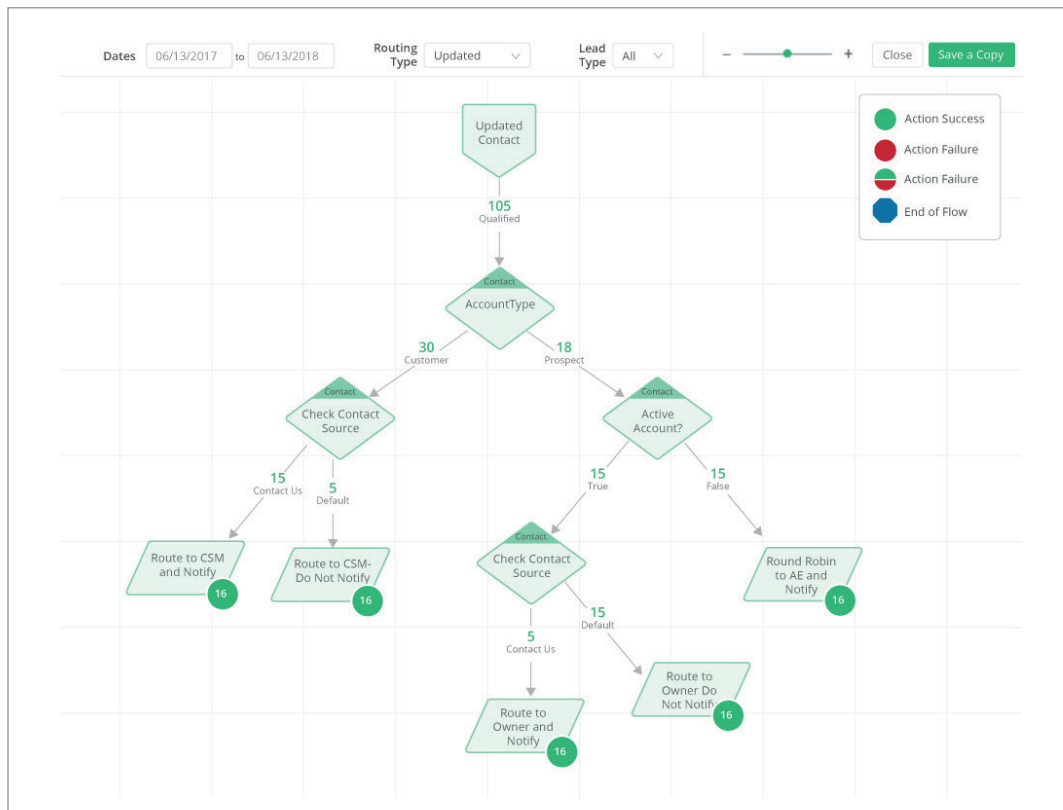


## Contact Management Helps In Many Ways

- **Lost Opportunity Re-engagement:** Route contacts to the Opportunity Owner when a previously lost opportunity re-engages
- **Contact Reactivation:** Nurture contacts that go cold and route them to correct owners upon reactivation
- **Upsell Management:** Route new contacts from existing active accounts to the Account Team to initiate an upsell conversation

### Safe & secure in Salesforce

- Native within Salesforce environment
- Your data is never exported
- LeanData maintains history of your previous routing rules



## Benefits Of Contact Management

- Focus Sales on the most relevant contacts for better targeting
- Faster sales cycle by responding immediately to re-engaging contacts
- Leverage lost opportunities in the system to win new deals
- Track impact of marketing campaigns on re-engaging existing contacts

**Action - Round Robin**

**Node Name**  
Round Robin To AE and Notify

**Description** >

**Contact Ownership**  
Specify the Round Robin group used to assign contact ownership.

Round Robin Group: New RR [view group](#)

**Alternate Field Assignment**  
 Assign Alternate Field Instead of Owner

**Email Notification**   
Send an email notification to the new lead owner.

Send Success Notifications *(will be sent to assigned lead owner)*

Email template: Round Robin Notification for Inactive Accounts [View Template](#)

Emails: Emails, separated by commas

Send Failure Notifications

**Advanced Settings** >

## Critical Components Of Contact Management

- Define business rules that trigger contact routing
- Set up contacts to be assigned to appropriate owners
- Notify owners of specific actions taken on contacts
- Track contact re-engagement and assignment with metrics

## Why LeanData?

Built upon the best-in-class matching technology, LeanData Engagement is the most simple, accurate, and actionable engagement analytics tool in the market.

LeanData provides the market's first Revenue Operations platform for accelerating revenue and growth in B2B. Standing at the center of Salesforce CRM, LeanData's family of solutions orchestrate and automate the go-to-market process to help revenue teams close more deals and drive more revenue, faster. Visit [leandata.com](http://leandata.com) to learn more about LeanData's revenue operations solutions for Lead-to-Account Matching, Routing, Engagement and Marketing Attribution. Or visit us on AppExchange.