

Use Time and SLAs for Routing

In Sales, your response time can often define win rates. As a result, a lot of teams create Service Level Agreements (SLAs) in the sales playbooks. These SLAs help ensure process compliance e.g. leads are responded to within a specific time or a lost opportunity is followed up after 4 months of losing the deal.

LeanData now offers Time-Based Routing as part of its robust Routing solution. With LeanData's Time-based Routing you can schedule the routing or re-routing of objects or automate actions like creating new objects and notifying sales reps. This ensures you can hold your team accountable for acting in a time-bound manner so customers always get prompt responses from your team.

Use Cases

- Automatically re-route a lead (or other object) if a rep / SDR does not take action / update the lead status in 2 hours
- Distribute engaged accounts to reps once a week at a specified time e.g. Sunday evenings
- Notify a sales rep and / or their manager if there is no activity on a lead within 24 hours
- Route a closed lost opportunity to an SDR for follow-up after six months of losing a deal
- Automatically create a renewal opportunity two months before the contract end date and assign it to the Account Manager on the account

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 [leadata.com](https://www.leadata.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.