

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.

Speed, with accuracy, wins

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

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.

Reduce time researching leads and accounts by

70%

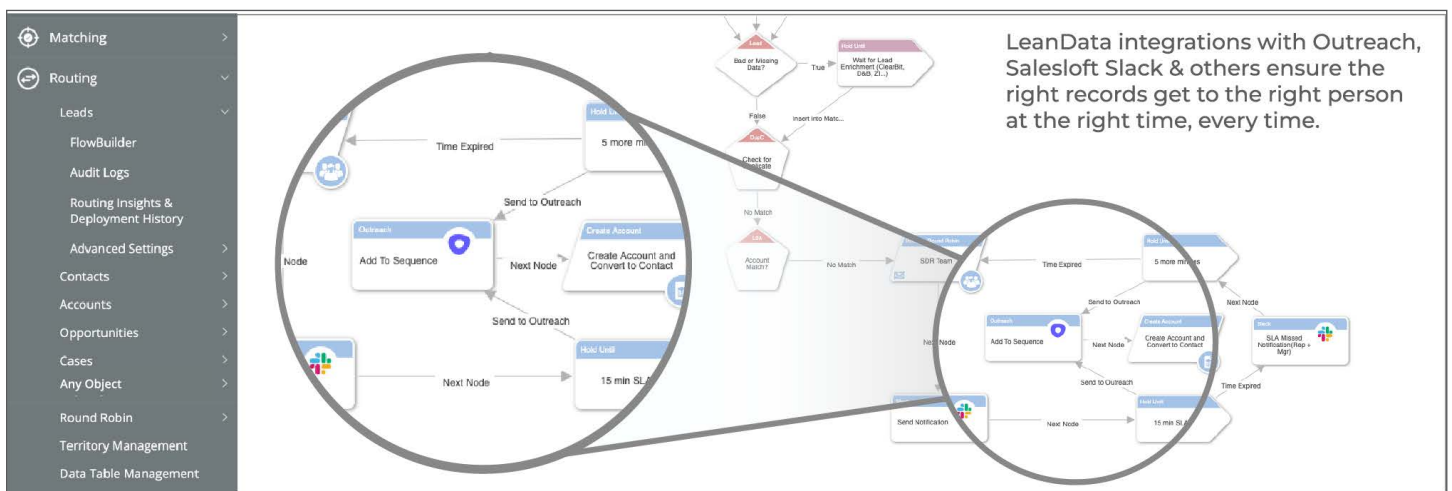
Reduce time to route leads by

90%

Increase inbound conversion

15%

with faster lead routing



Proven Results with Over 800 Customers



The Gold Standard for Routing in 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.

Immediate Notifications

Improve productivity and process adherence with contextual notifications at just the right moments. Add NotifyPlus to create or update Salesforce records from directly within Slack!



Lightning-Quick Replies

Kickstart your customer experience through seamless integrations with Salesloft, Outreach, Groove, and Gong.



Routing Scheduler

Schedule routing jobs in the future or on a cadence. Schedule regular cleanups or run one-time routing jobs to distribute leads, contacts, accounts and opportunities in a single go.



Routing with NotifyPlus Example



Request Demo

Get Started Today:

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 800 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!