

Automated Alerts

You Didn't Know You Could Do in LeanData



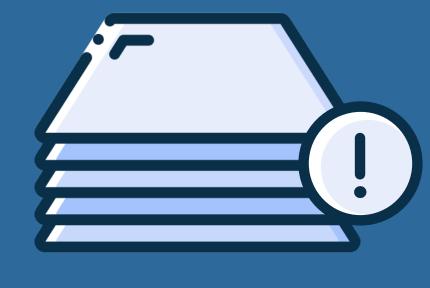
LeanData alerts can be automated and delivered into Slack, Microsoft Teams, or email. These automated alerts are full of rich context — like details on the triggering event and what steps to take next

1. Opportunity Creation Alerts



When a new Opportunity is created, LeanData will assign the appropriate owner based on custom logic and then alert the appropriate owner.

3. Crossbeam Partner Overlap Alerts



LeanData can use the <u>Crossbeam</u> integration node to identify partner overlap at an Account and alert the appropriate AE.

2. Stage Change Alerts



LeanData can send notifications or take action on Opportunity stage changes and customize alerts based on any Account, Opportunity, or matched record data.

4. Won Opportunity Alert



LeanData can send email and/or instant message alerts whenever an Opportunity has moved to "Closed Won", including a reminder to the AE to handoff to the CS team.

5. Start or End of Trial Alert



alerts when an Opportunity is starting a trial period or nearing the end of its trial period.

Do you run a PLG motion? LeanData can send

6. Deal Stuck in Stage Alert



If an Opportunity has been in one particular stage for over 30 days, LeanData can send an alert to a sales rep to take action.

7. Stale Sales Account Alerts



without activity in a predetermined period, Accounts with no Opportunities, or any other criteria that would make the Account "stale."

LeanData can call attention to Accounts

8. Routing Monitoring Alerts



instant messages or email if processes were delayed, aborted, or incomplete.

(SLA) Alerts

9. Missed Service Level Agreement



priority leads, and notify the manager or automatically reassign if a lead is not actioned in a timely manner.

10. Duplicate Record Alert



using our matching algorithm, alert the account owner, and stamp the ID of the duplicate onto the new account.

11. Job Change Alerts



LeanData then alerts the appropriate AE or

SDR with context.

The LeanData routing scheduler can automatically create or update new records for new job changes detected by UserGems.

12. Webinar Attendance Alerts



Contact registers for your webinar.

Contact records in Salesforce when a

So Much More Than Matching & Routing



LeanData alerts supply all the information needed to guide your employees' next best steps.