



The Ultimate Guide to LeanData

Your Playbook to Automation, Efficiency, and Scalable GTM Execution

Introduction

Think LeanData just matches leads to accounts? Think bigger. Way bigger.

This guide is your backstage pass to the software that's quietly powering the go-to-market engines for some of the most successful organizations on the planet.

In fact, our customers call us **the quarterback or connective tissue of their tech stack** — it's what gives them a competitive edge.

There's no sugarcoating it: creating an efficient, revenue-driving, go-to-market engine is no simple task. Your data's scattered everywhere, leads are slipping through cracks, and revenue teams are still distracted by manual tasks they shouldn't have to deal with.

That's where LeanData comes in.

Inside this guide, you'll discover how to:

- Transform messy data into your biggest asset
- Speed up your pipeline with smart routing and instant meeting scheduling
- Master the art of matching leads, contacts, and accounts
- Make renewal and upsell opportunities practically sell themselves
- Turn multi-stakeholder deals from nightmare to no-brainer with Buying Groups

Whether you're a LeanData pro or just starting to kick the tires, this guide is packed with ideas that'll make you say ***"Wait, we can do that?"***

So get ready to geek OUT and explore all the ways LeanData can help you close more deals, land bigger accounts, and crush your revenue targets.

Table of Contents

- 04** **SECTION 01** Data Management
Clean, dedupe, and auto-maintain all of your critical Salesforce data.
- 12** **SECTION 02** Pipeline Acceleration
Get leads moving toward the finish line with data and alerts.
- 17** **SECTION 03** Lead, Contact, and Account Matching
Match new leads to existing accounts, opportunities, and contacts.
- 21** **SECTION 04** Routing and Distribution
Get leads, accounts, opportunities and cases to the right reps asap.
- 34** **SECTION 05** Scheduling Meetings with BookIt
Automate meeting scheduling in chat, email, or on your site.
- 41** **SECTION 06** Engagement, Upselling, and Renewals
Add leads to engagement workflows, renewal motions and automated upsells.
- 45** **SECTION 07** Opportunity-based Strategies and Buying Groups
Identify and engage all members of the buying committee to move deals forward faster.
- 51** **SECTION 08** Boost Productivity and Collaboration
Tap into LeanData's less-known efficiency tools.
- 54** **NEXT STEPS** Improve your LeanData Skills
- 55** **ABOUT LEANDATA**

SECTION 01

Data Management

Most organizations tackle data management only when issues pop up. But what if you could avoid those headaches altogether? With proactive, automated data management, you're always a step ahead.

LeanData is like your personal data housekeeper, putting data management on autopilot. It keeps your Salesforce tidy, organized, and ready to roll.

"LeanData solves our org's data hygiene problem by doing the heavy work regarding dupes, sorting, and routing. It allows us to save time doing these tasks and allows us to be more productive and efficient."



Nathan T.

Mid-Market (51-1000 emp.)



User Review

Unify and Clean Up Your Salesforce Data

Connect data sources and revenue solutions

With 17+ integration partners and more to come, LeanData acts as a **central data management and orchestration hub**.

The platform provides dozens of out-of-the-box partner nodes and a library of integrations to help you enable sophisticated go-to-market motions: PLG, SLG, ABM, and Buying Groups. Use LeanData integrations to build the most efficient, impactful lead-to-revenue workflows.



See LeanData Integrations



Manage and auto-update your Salesforce records

LeanData is 100% Salesforce-native. That means **your data never leaves Salesforce** and you always have a single source of truth. Further, your data is always in sync with your Salesforce instance.

available on
AppExchange



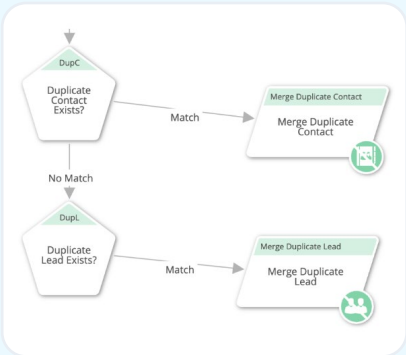
Not to mention, your admins and operations teams can work in the tools they're comfortable with. When users log into Salesforce, they immediately receive access to LeanData. Additionally, training, adoption rates and usage all become easier because users only need to learn one Salesforce interface.

Unify and Clean Up Your Salesforce Data

Identify and merge duplicate leads and contacts

LeanData will automatically identify duplicate leads, contacts, accounts, and opportunities. LeanData’s matching capabilities let you fine-tune your matching logic with filters and tiebreaker rules, or build advanced workflows for [auto-merging duplicates leads and contacts](#).

Learn more about finding duplicate [leads](#) and [contacts](#).



Flag duplicate accounts and approve merges

LeanData Account Router works much like its lead and contact object counterparts. Rather than auto-merging and potentially destroying important data, you can evaluate the potential duplicate to determine whether to merge it or not. If you prefer to run this flow at regular intervals rather than running it continuously, schedule it using the LeanData Routing Scheduler.

A2O	Account to Opportunity (A2O)
DupA	Duplicate Account (DupA)
RA	Related Activity (RA)

See the Account Router Guide >

Unify and Clean Up Your Salesforce Data

Dedupe accounts in real time with Cloudingo

Use LeanData's Cloudingo integration to dedupe accounts in real time while protecting the information your revenue teams rely on. Once you've [set up the Cloudingo integration](#), you can use the [Cloudingo Merge Account Node](#) in your Account Router workflows to customize your merge logic.

Whenever a new account is created in Salesforce, it gets routed through your graph, deduped, and merged accordingly—LeanData will also alert the account owner to review the change.



Learn More about
LeanData & Cloudingo



Preserve specific fields when merging

Create exceptions to your merge logic by preserving specific fields. When you're in Lead Router, add a True/False decision node and choose which fields to preserve. Then add another node that updates the new lead with the existing value before merging.

For example, you might want to check whether an existing duplicate lead has a sales-qualified (SQL) status, preserving it even after the leads are merged.



Unify and Clean Up Your Salesforce Data

Group related leads with no account match

When you're not sure which account a lead belongs to, but want to make the best possible guess, start with LeanData's lead to lead (L2L) matching node. Next, create a text field in Salesforce called "Potential Account Name."

Then, use the node to look for a related lead whenever a new lead does not match to an existing account. If a related lead exists, LeanData can stamp the Potential Account Name field with the company name from the existing related lead.

Eventually, you'll have an aggregated list of these related leads and can decide whether it's worth creating a new account.

[Watch the video here](#) >

Manage orphan prospects with Outreach

Use LeanData's [Outreach integration](#) to solve a common error that happens when an Outreach user creates a new prospect, but leaves the company field blank. In this case, the new prospect fails to sync to Salesforce.

LeanData solves this issue by automatically filling the missing field, finding duplicates, and identifying an account match if it exists.

Don't have the Outreach integration yet?

[Follow the steps here.](#)

🔥 Apr 27, 3:45 PM

Plugin Sync Error - Errors prevented the plugin to sync

An internal error occurred. Our engineers have already been notified. Please contact support@outreach.io if you need further assistance.

Transform and Auto-Update Data

Enrich data with LeanData enrichment partners

LeanData has [direct integrations](#) with several enrichment vendors. If you can't find the integration here, don't worry. LeanData can accommodate any enrichment software that works with Salesforce.



Once you've installed an enrichment integration, add the corresponding partner node to your graph to enrich a lead or contact with third-party data. This creates sophisticated routing flows that deliver the lead or contact to the right rep based on data that may not have been available in Salesforce.

Automatically append text to a field instead of replacing it entirely

Using the [Update Record node](#) within LeanData Routing, you can insert multiple variables into the field values you wish to update while still preserving existing content. Just name your Update Record node "Append Text" and enter the details to specify which field and how to update it.



Transform and Auto-Update Data

Update records related to the one you're currently routing

Sometimes you need to update a different record than the one you are routing. Using the Updated Lead entry point, LeanData Routing can look for activities related to the lead, assign the tasks to the right rep, and then mark the tasks on the original lead as completed.



Reassign “inactive-owned” records to active employees

LeanData's Routing Scheduler is a great tool for periodically cleaning up data that might slip through the cracks when a rep leaves or becomes inactive. Create a scheduled routing job that checks for inactive owners Salesforce, then automatically reassigns their records to active employees.



Transform and Auto-Update Data

Align contacts with account owner

Use LeanData to keep data clean as reps join the team, change roles, or leave. When you change an account's owner in Salesforce, for example, it doesn't necessarily change the owner of each contact within that account.

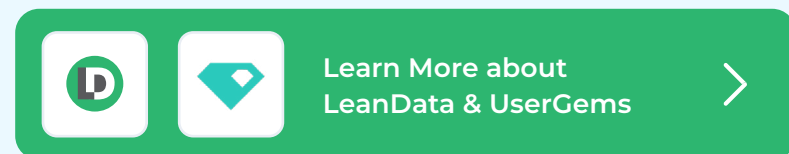
Fix this discrepancy by automatically assigning these contacts to the new account owner with a scheduled job in LeanData.

The screenshot shows a job configuration form in LeanData. The 'Job Name' field is set to 'align contacts with account owner'. The 'FlowBuilder Graph' dropdown is set to 'Align Contact Owner with Account Owner'. The 'Trigger' dropdown is set to 'New Contact'. Under 'Job Type', 'One-Time' is selected. Under 'Start Time', 'ASAP' is selected. The 'Records to be Routed' section indicates 'Choose a method below to select which records to route in this job.' The 'CSV File' method is selected, with a 'Browse and Select CSV to Upload' button and a 'Browse' button.

Update records after a job change with UserGems

The LeanData Routing Scheduler can automatically create or update new records for job changes detected by UserGems, a Salesforce-native application that alerts sales reps when opportunity contacts and former customers change jobs.

LeanData then automates alerts to the appropriate AE or SDR with context and a call to action.



SECTION 02

Pipeline Acceleration

LeanData keeps your pipeline moving at every stage, including renewals and upsells. It automates sales tasks and notifies reps when records progress, key changes happen, or promising leads appear.

"I LOVE LeanData.

It has been so transformational for us. In adopting this process, we've seen a **60% increase in pipeline** generated per month by putting these two [6sense + LeanData] technologies together. It's been a complete game changer."



Latané Conant

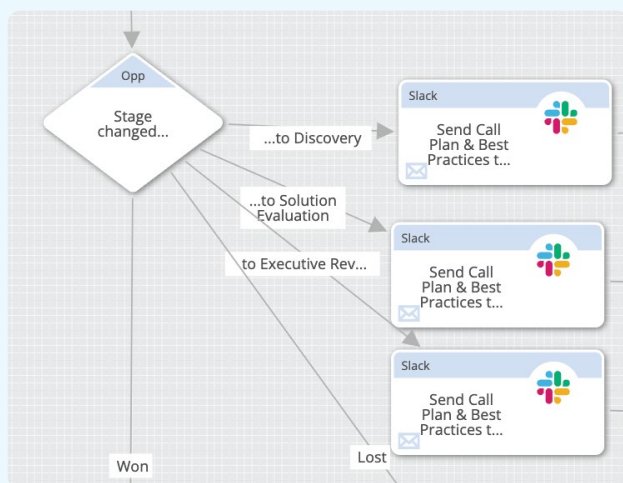
Chief Revenue Officer



Automate Pipeline Growth

Send alerts for key moments in the sales cycle

With LeanData, there are all kinds of ways to alert reps of important activity and move opportunities through the pipeline. Create email alerts or integrate with [Slack](#) and [Microsoft Teams](#) to update the right people when an important record is created or updated in various ways.



Opportunity created

Assign an owner to a new opportunity based on custom logic, then alert them via email, Slack or Microsoft Teams.

Opportunity stage changed

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

Fields missing

If an opportunity moves to a stage that requires certain fields to be completed, LeanData can send a reminder to the sales rep and their manager to fill them out.

Special qualification thresholds reached

If an opportunity is over a particular dollar amount, for example, LeanData can alert relevant team members.

Key activity missing

If an opportunity moves to the negotiation phase, for example, LeanData can check related activity records on the opportunity to see if a scope call has been completed. If not, the appropriate manager and solutions consultant will be alerted.

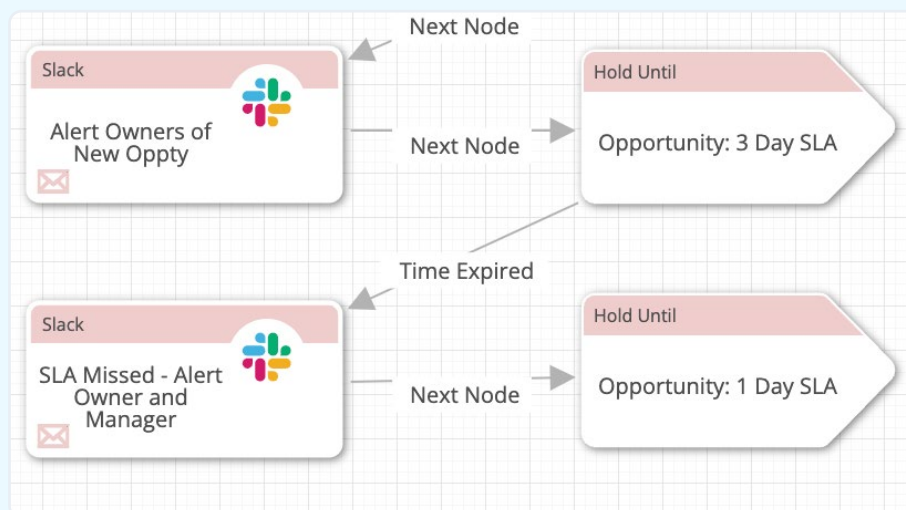
Deal stuck in stage

If an opportunity has been in the same stage for longer than your specific time period, LeanData can send an alert to a sales rep as a reminder to take action.

Won opportunity

LeanData can alert the right people when an opportunity has moved to “Closed Won.” This may include reminding the AE to complete a handoff form, alerting the CS team of a new customer, or alerting an entire Slack channel to congratulate the rep who closed the deal.

Stay on Top of Sales Follow-Up



Pinpoint stale sales accounts

LeanData can call attention to accounts without activity in a predetermined period, accounts with no opportunities, or any other criteria you decide makes the account “stale.” LeanData will also mark these accounts for review by the Sales team.

Alert reps of missed SLAs

LeanData can alert your Sales reps of priority leads. LeanData will also notify the manager or automatically reassign if a lead is not actioned in a timely manner.

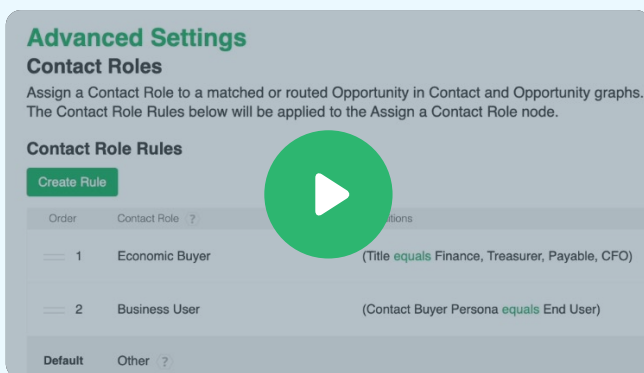
Alert reps when a trial starts or ends

Do you run a PLG motion? LeanData can send your sales reps alerts when an opportunity is starting a trial period or nearing the end of its trial period.

Analyze Key Roles and Buying Intent

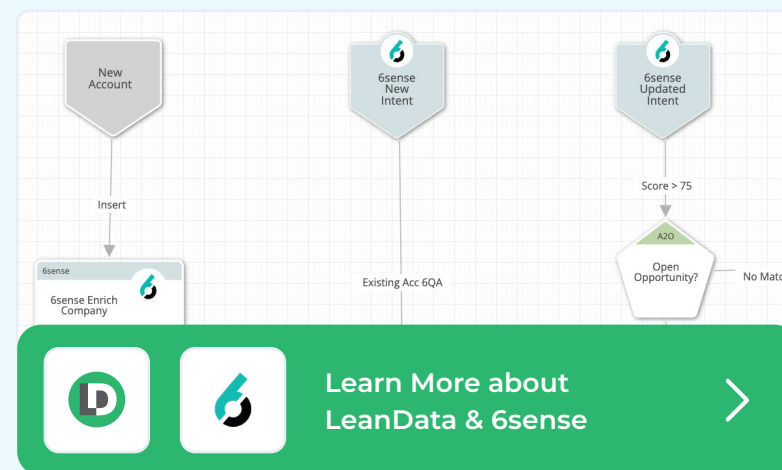
Automatically add contact roles to opportunities

Sometimes you need to assign a contact a specific buying committee role as it relates to a single opportunity, like Economic Buyer or Business User. To associate contacts with opportunities and assign roles, use a matching node in your routing flows first. Then assign a contact role based on variables you can adjust, like job title or persona details.



Identify in-market accounts with 6sense

LeanData's 6sense integration identifies in-market accounts and enables revenue teams to prioritize related leads. Based on 6sense signals, LeanData will update your leads with contextual data and quickly route them to the appropriate reps for engagement.

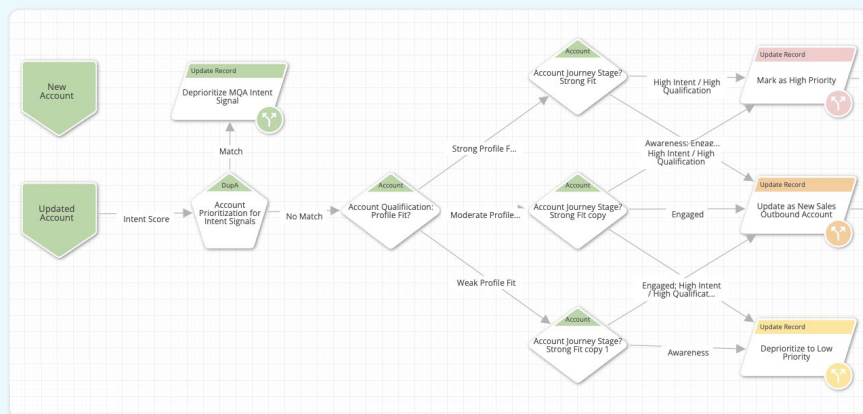


Analyze Key Roles and Buying Intent

Trigger sales and marketing activity based on intent

LeanData allows you to take intent data and turn it into a strategy that is unique to your organization—helping you send out the most actionable alerts to your sales team.

For example, when an account shows enough of the right signals, LeanData ensures it gets into the right hands.



Here's a few examples of how that works in practice:

- If a prospect shows interest in your competitors and there's an open opportunity, LeanData can alert the sales rep to guide the buyer through their options.
- If a customer is researching competitors, LeanData alerts the account manager to address any product concerns, resolve potential issues, or engage with a new contact at the company.
- In a third scenario, if a current customer is exploring our software category, we might invite them to a hands-on learning session or offer LeanData certification opportunities.

By combining your first-party data—what your CRM already knows about an account—with intent signals, LeanData enables your reps to engage in a thoughtful, timely way.

SECTION 03

Lead, Contact, and Account Matching

LeanData matches new leads to existing records for accurate distribution. Our proprietary Fuzzy Matching Algorithm analyzes company data, email domains, and more to find the best match. Customize matching logic and add tiebreaker rules for greater control. Once matched, use LeanData's no-code FlowBuilder to action the records.

"Great sales tool with helpful administration tools. This app extends Salesforce feature sets for lead, account, contact, and opportunity matching, and provides admins with the information needed to easily investigate/troubleshoot when the business wants to know why records were matched or routed the way they were."



Jamison V.

Senior CRM Manager
Enterprise (>1000 emp.)



User Review

The LeanData Fuzzy Matching Algorithm

The LeanData platform is built upon a best-in-class fuzzy algorithm, an approach that's commonly used to extrapolate the best possible answer from an imprecise or non-numerical dataset.

In plain terms, fuzzy matching matches leads to other records in Salesforce even when the data isn't perfect.

LeanData uses six different fields to fuzzy match, but there's also room for customization through tiebreakers.

 Matching

Tagging Preview

Tagging Settings

Account Scoring

List Analyzer

Matching Settings

Advanced Settings

Matching

Matching Settings

These settings determine how objects are selected and prioritized for matching throughout the product.

General

Matching Fields

Lead

Contact

Account

Custom and Default Lead Matching Fields
Increase your Matching accuracy by specifying one additional field per input in LeanData's Fuzzy Matching algorithm. Both the additional field and the default field will be considered when LeanData evaluates a Lead record for fuzzy matching.
Note: The new fields will apply to all Lead-based fuzzy matching across LeanData's Matching, Routing, and BookIt products.

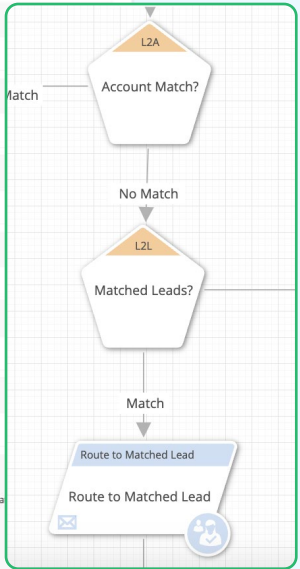
[Revert to LeanData Default Fields](#)

Company (default)	→	Company
Select Company Field	Clear	Company
Email (default)	→	Email
Select Email Field	Clear	Email
Website (default)	→	Website
Select Website Field	Clear	Website
Street (default)	→	Street
Select Street Field	Clear	Street
Zip/Postal Code (default)	→	Zip/Postal Code
Select Zip/Postal Code Field	Clear	Zip/Postal Code
Phone (default)	→	Phone
Select Phone Field	Clear	Phone

Special Fields in Lead-to-Account Matching ☐ Off ☒ On

Supercharge your Lead-to-Account Matching accuracy by specifying a special field from both Lead and Account. If there is an exact match between the special fields, LeanData will consider the pair a potential match, regardless of the results of fuzzy matching.

Select Matching Field



```
graph TD; L2A{L2A} --> AM{Account Match?}; AM -- Match --> L2L{L2L}; AM -- No Match --> L2L; L2L -- Matched Leads? --> RML1[Route to Matched Lead]; L2L -- Match --> RML2[Route to Matched Lead];
```

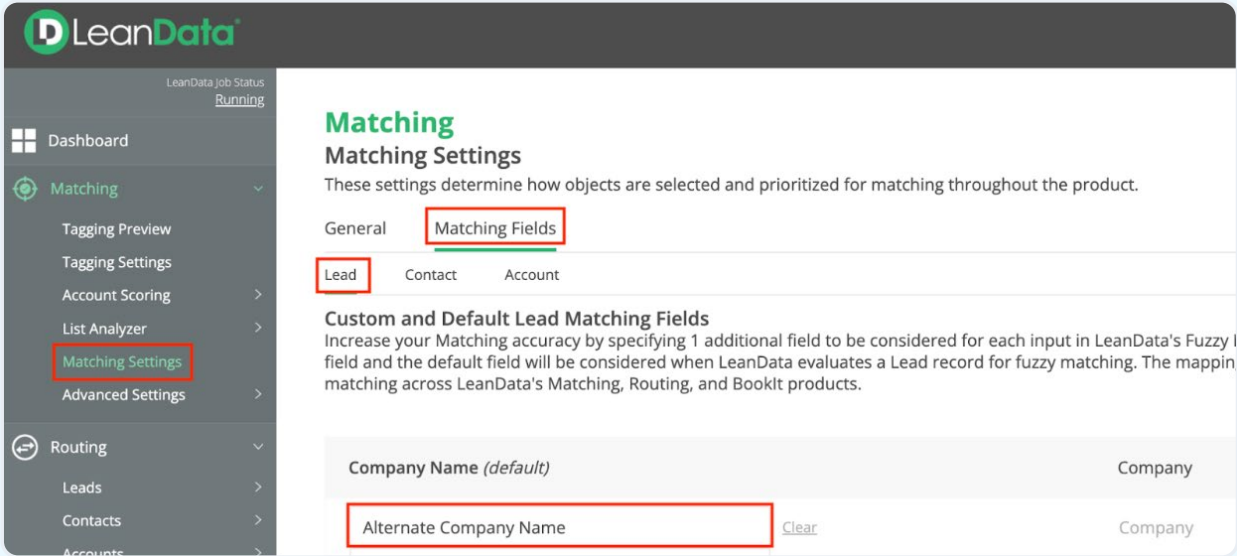
The flowchart illustrates the matching process. It starts with a decision diamond labeled 'L2A'. An arrow points down to another decision diamond labeled 'Account Match?'. From 'Account Match?', a 'Match' path leads to a third decision diamond labeled 'L2L', and a 'No Match' path also leads to 'L2L'. From 'L2L', a 'Matched Leads?' path leads to a parallelogram labeled 'Route to Matched Lead', and a 'Match' path also leads to another parallelogram labeled 'Route to Matched Lead'.

Matching with Accuracy

Create custom match fields

If you rely on different fields, like those enriched by a third-party vendor, or if you want to switch between standard and custom fields, you can supplement LeanData’s Fuzzy Matching Algorithm with custom match fields.

Under the Matching Settings page, add an additional custom field for each of the default fields that the algorithm references. Once a new field is added, LeanData will consider both the new and default field when determining a potential match.



Matching with Accuracy

Reference different matches with variables

There may be multiple account matches in your CRM. For example, a lead may enter your system and match to both the US and International accounts for a particular organization.

LeanData's Object Variables will allow you to store different matches in different Variables and reference them whenever you need them in your routing graph. In this case, the lead can be matched to its billing account in the US but ultimately assigned to its appropriate international sales rep.

[Watch the video here >](#)

Detect record matches from an event list

Trade show lists often have poor data quality—missing information, containing duplicates, and including other inaccuracies—making follow-up difficult.

List Analyzer lets you check a list for matches to existing Leads, Contacts, or Accounts in Salesforce. Simply upload a CSV file—don't worry, LeanData won't upload leads into Salesforce.

Use List Analyzer pre-event to prevent duplicates, fill data gaps, and identify attending accounts.

Post-event, analyze scanned leads, upload the scrubbed list, and use lead-to-account matching to fill in missing data.

[Learn about List Analyzer >](#)

SECTION 04

Routing and Distribution

Automate assignments and updates of Salesforce records at scale according to any business logic using a drag-and-drop interface to design and deploy automation. Route records according to assignment models like round robin, territory, and explicit users. Then, notify any person or channel of recent updates or immediate action needed at any moment, with complete context.



LeanData customer
UserGems saves
10-20 hours per week
by no longer having
to troubleshoot lead
routing issues.

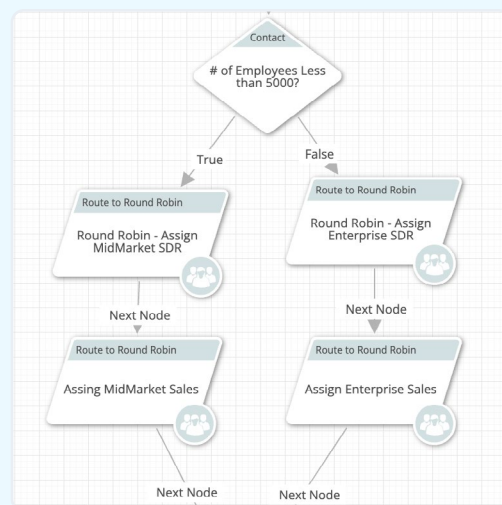
[Read the Customer Story >](#)

Lead, Contact, Account, Opportunity and Case Routing

Map out lead distribution flows with a drag & drop UI

Instead of creating assignment rules or custom code in Salesforce, LeanData lets you create nuanced lead distribution flows using a simple drag and drop interface.

Use FlowBuilder to automate this critical go-to-market process, configuring custom logic to fit your sales strategy and operational needs.



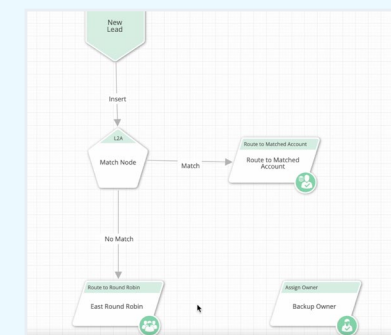
Consider reps' working schedules

When routing leads, you want to make sure reps are awake and available to take on new assignments. Create working hours, adjust for vacation time, and incorporate alternate working hours into routing with Schedules and Queues.

Day	Start Time	End Time
Sunday	No Working Hours	
Monday	08:00 am	05:00 pm
Tuesday	08:00 am	05:00 pm
Wednesday	08:00 am	05:00 pm
Thursday	08:00 am	05:00 pm
Friday	08:00 am	05:00 pm
Saturday	No Working Hours	

Add schedules and assign them to users or groups of users.

[How to Set Up Schedules >](#)



Specify general working hours for a whole pool of reps in addition to individual schedules.

[Watch the Video >](#)

Lead, Contact, Account, Opportunity and Case Routing

Cap assignments using time-based or conditional rules

Cap the number of leads and accounts that can be assigned to a user based on a multitude of criteria. Set the maximum number of accounts each AE can manage, control how many leads each user gets per day or week, and anything else you want to use to keep reps' workloads manageable.

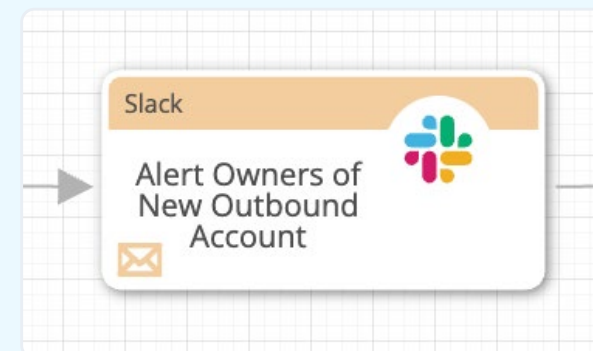
SDR Pipeline Rule
General Conditions

Name	SDR Pipeline Rule	Description optional	ARR Amount
Object Type	Opportunity		

[Read the Capping Guide >](#)

Alert team members of new assignments

Send email, Slack, or Microsoft Teams alerts when a record is assigned. You can configure these alerts to include contextual data, inform reps of pending tasks and next steps, and keep managers up to date on their team's responsibilities.



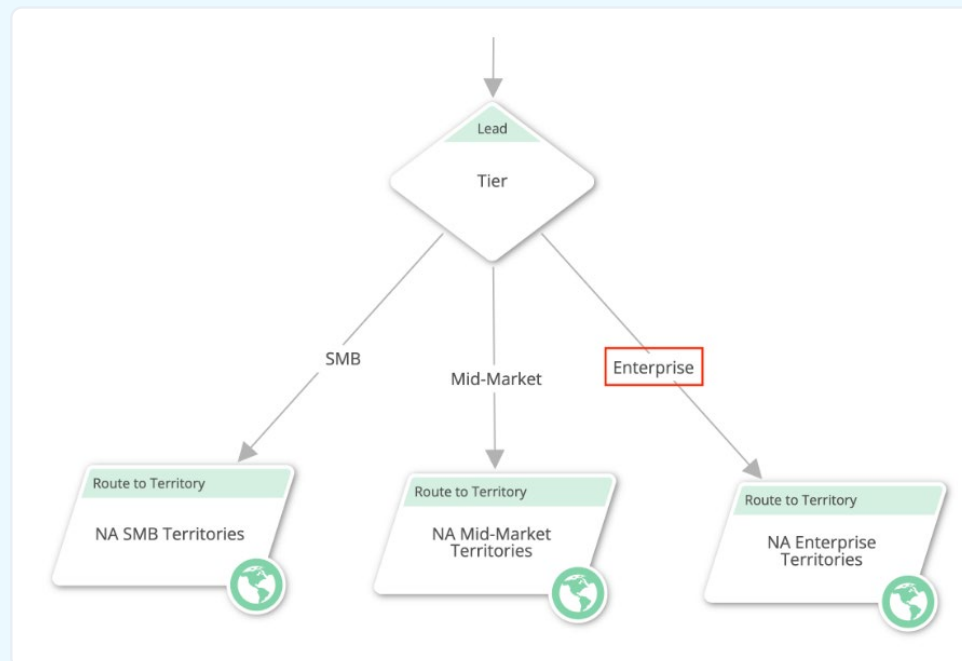
Territory-based Routing

Automate routing based on sales territories

A lot of organizations deal with constant territory management changes, especially when it comes to dividing and assigning territories to different reps. These shake-ups can really hit sales team morale and hurt performance, often showing up as delays in getting revenue in the door.

Create no-code flows in LeanData that properly route leads, contacts, accounts, and opportunities based on your territory strategy. You can map territories to individuals or round robin pools.

Plus, if the location on an account record changes, LeanData will automatically update routing accordingly.



[Get the Territory Routing Datasheet >](#)

Round Robin Distribution

Automate your round robin distribution

Create round robin routing flows in LeanData to fairly distribute leads among a group of sales reps or cases among your customer support team. Drag and drop nodes, set custom thresholds and routing logic, and manage different pools based on how your teams are structured.

Edit Members in Round Robin Pools

Add Members ?

Manual Conditional

Conditional Membership ? Off On

Scheduled Sync ?

☐ Monthly on the 1st at 12:00AM EST ✉

Conditions

Create Conditions Switch to Free-form

Click 'Create Conditions' to begin creating SOQL conditions

☐ Include Inactive Users

More on Round Robin
Distribution best practices >

Update round robin pools with conditional membership

Keep your round robin pools up to date without manual work based on your own set of criteria. You can also use this functionality to keep pools clean, running a process that removes deactivated employees, for example, from your round robin pools using conditional logic.

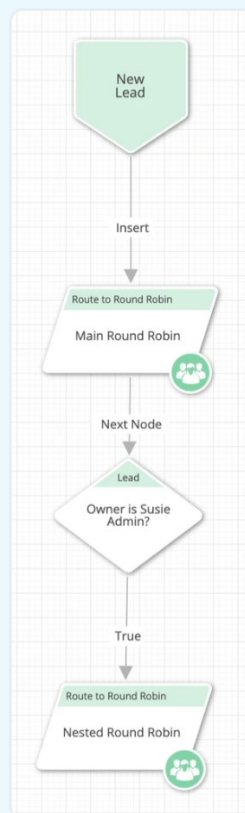


Round Robin Distribution

Nest your round robin pools

Set up nested round robin pools to save yourself the headache of creating more lead assignment rules in Salesforce. Just create a placeholder user in one of your existing pools, route leads through a main round robin node, and then again through your nested node. Now you've approximated a nested round robin pool capability without ever leaving LeanData.

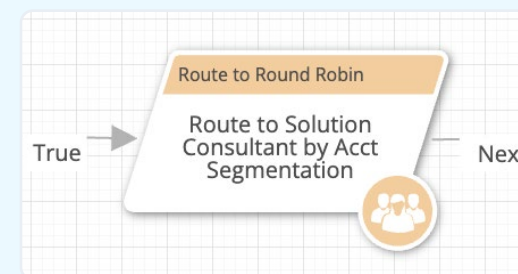
[Watch the video here](#) >



Round robin new opportunities to solutions consultants

Round robin distribution isn't just for sales reps.

When an opportunity is created or updated, LeanData can distribute it to a solutions consultant (SC) based on factors like the account type, account segment, or opportunity type. The flow will update a custom SC field and automatically send the consultant an alert to let them know they have been assigned a new opportunity.



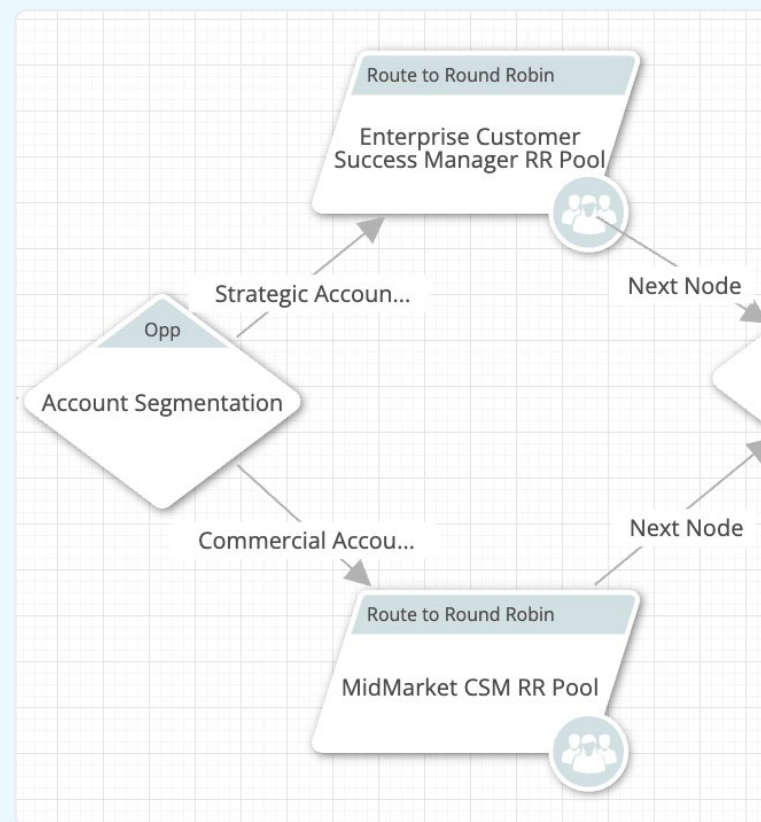
Routing for Customer Success

Route cases to your CS team

The LeanData Case Router helps customer success teams provide effective and timely communication and engagement with customers.

Here are just a few examples of how LeanData automation helps with case routing:

- Update new case field and send automated alerts to CS managers or reps
- Track how long it takes for CS reps to respond to or close a case
- Reassign active cases when reps are outside of working hours or on a vacation
- Auto-close a case when certain criteria on the case or account has been met
- Route onboarding cases to the appropriate CSM after the deal has closed



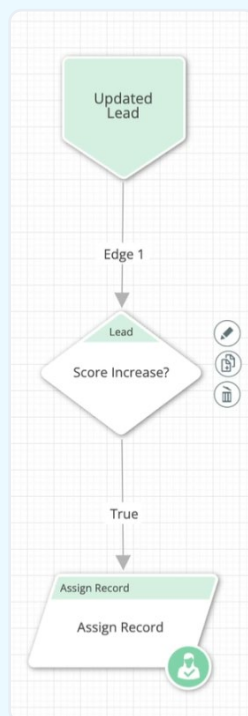
Maximum Routing Sophistication

Trigger lead routing on directional changes

You may want to trigger routing when the value in a Salesforce field changes in a particular direction.

For example, LeanData automation has the ability to route a record when a lead score increases, but not when it decreases.

Essentially, LeanData will trigger routing or alert a rep to take action based on how much a number changes and in which direction.



[Watch the video here](#) >

Continue routing after conversion

If you work with both leads and contacts, you may want to continue routing after the lead has been matched to an existing account and converted to a contact.

LeanData can trigger contact routing after conversion, with the option to restrict this process only to contacts that were converted by LeanData.

Create a field on your contact record called "Routing Action", which will be stamped with a value anytime LeanData performs an action on it—when this field contains "converted," the new contact record will continue on in your Contact Graph.

[Watch the video here](#) >

Maximum Routing Sophistication

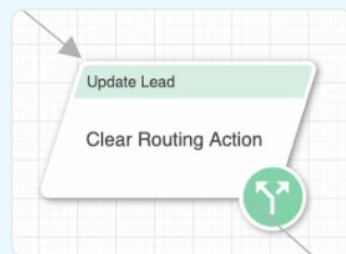
Continue routing after merging duplicates

With LeanData, you can merge duplicate records and then take further action on the merged record.

First, contact LeanData and confirm that you have “recursive routing” enabled. This feature is a safeguard within LeanData that prevents infinite routing loops.

Once that’s done, this automation will update the master record so you can trigger further routing in the Lead or Contact router.

[Watch the video here](#) >

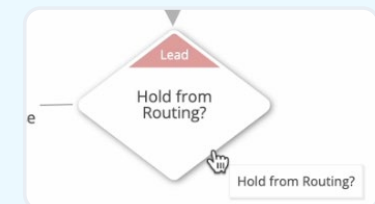


Prevent double lead routing

As a new lead continues to interact with assets on your website, it may get updated multiple times shortly after it is created.

This can lead to routing the record twice. Prevent double routing by using LeanData’s “Hold from Routing” checkbox field. The LeanData Router will run a new lead through regular matching and assignment, and then hold it for a specified timeframe. When the time has expired, LeanData automation unchecks the Hold from Routing box.

[Watch the video here](#) >



Maximum Routing Sophistication

Bypass Salesforce validation rules

Salesforce validation rules are true/false conditions that generate custom error messages when someone enters data that goes against the condition.

For example, if your company requires a phone number on every new lead, the validation rule will create an error message when a user attempts to save a record without a phone number.

As a native Salesforce application, LeanData is subject to any validation rules you create. However, LeanData also provides a way to bypass validation rules when appropriate.

Watch the video here >

SETUP > OBJECT MANAGER
Lead

Lead Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit [Save] [Save & New] [Cancel]

Rule Name:

Active: ☒

Description:

Error Condition Formula

Example: [More Examples...](#)

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

Functions

-- All Function Categories --

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

ABS(number)
Returns the absolute value of a number, a number without its sign

[Help on this function](#)

Greater Proactivity and Productivity

Monitor and alert on routing process issues

With LeanData, there's no need to check your admin settings to see if a routing process is failing. It's easy to configure alerts for when routing is delayed, aborted, or incomplete, helping your team be proactive and deliver missing records before anyone notices an impact.

Routing Alerts
Sends email notifications to recipients (configured on the recipients tab) when LeanData Routing experiences a processing delay.

Routing Delay Definition
Define Routing Delay (in hours) for your organization. You will receive a notification when a CCIO is not processed after the time frame set below.
 Hour(s)

Email Frequency
Designate the frequency for follow-up email notifications when routing delays occur and remain unresolved.
Every Hour(s)

[Learn more >](#)

Perform A/B testing on lead routing scenarios

You may want to test notifications sent to members of a Round Robin pool to determine which notification generates the fastest follow up.

In this scenario you can use two Round Robin pools to split leads evenly across Notification A and Notification B, monitoring the time-to-action for each and reporting on the A/B test results.



Greater Proactivity and Productivity

Empower your team with self-serve audit logs

Always answering questions about why records were routed the way they were? Give your team members a direct link to the audit logs to investigate on their own.

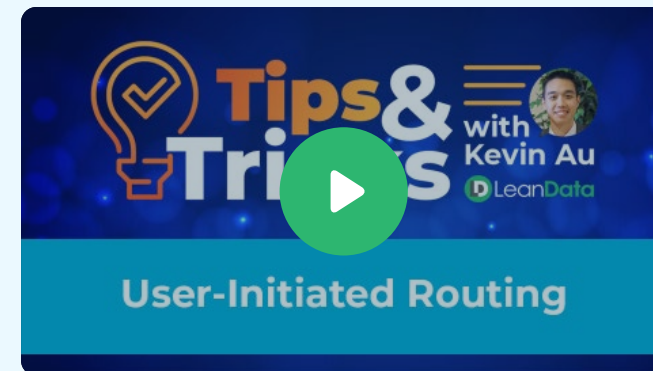
Send it via email, Slack, or Microsoft Teams so the recipient can quickly review the logic behind each lead's routing path.



Enable user-initiated routing

If you would like to give your sales reps the ability to route a record without needing admin privileges, LeanData allows for user-initiated routing.

You can also let them trigger routing again on the same record by adding an Updated Lead node.



Greater Proactivity and Productivity

Allow a sales rep to add or drop an account

There will always be a need for the Sales Team and RevOps to adjust round robins, modify sales pools, balance territories and set up schedules such as working hours, vacations, and regional holidays to ensure lead equitability.

So, to save time and build a more efficient, scalable process, you can automate the process of adding accounts and unassigning accounts in LeanData.

Here's how the process works:

1. AE finds the Account they want to add.
2. AE updates the Add/Drop Request in Salesforce to Add as Named on the Account record.
3. The appropriate Manager approves or rejects the request, triggering the LeanData FlowBuilder to update the Account record.

Managers can review the add/drop requests through a Salesforce dashboard on a regular basis.

Add/Drop Request

✓ --None--

Add as Named

Add as SDR Named

 **LeanData** APP 8:52 AM



Heads up. Your request to **add** [Acme co.](#) has been approved!
Auto-generated via LeanData (Account.Sales.DropApproved)

SECTION 05

Scheduling Meetings with BookIt

LeanData BookIt streamlines scheduling across every channel. Set meetings from chat, email, webforms, and more. Choose to route leads first, then check availability, or show multiple reps' schedules and route later.

"BookIt has drastically improved our MQL-SQL conversion and Speed to Lead KPIs. We love Leandata overall and BookIt is icing on the cake. We use it to fully automate our inbound process. We are averaging 8 minutes or less speed to lead by using lead/contact routing, the Outreach integration, and bookit. Can't recommend it enough."



Greg L.

Sr. Manager, Global Marketing Ops
Mid-Market (51-1000 emp.)

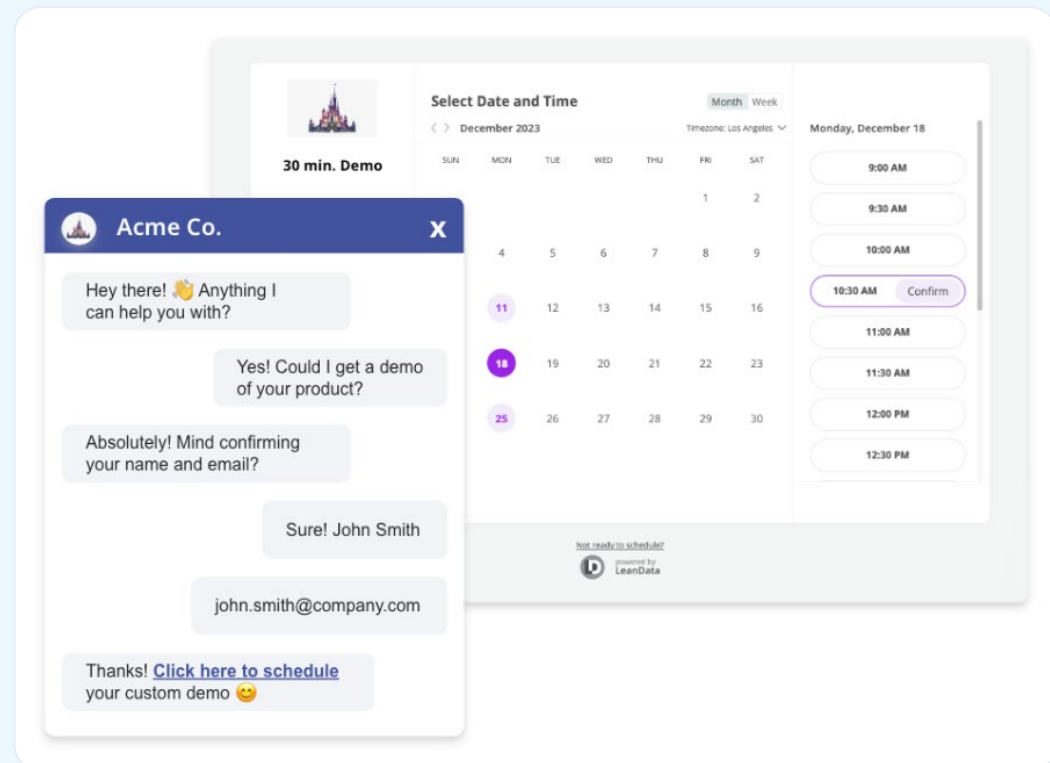


User Review

Automatic, Omnichannel Scheduling

Schedule meetings from an AI chatbot conversation

Use BookIt to schedule meetings directly from an AI chat experience. The platform automatically detects the right language and suggests appropriate meeting times. Then, BookIt uses contextual chat data and custom routing logic to make the best assignment.



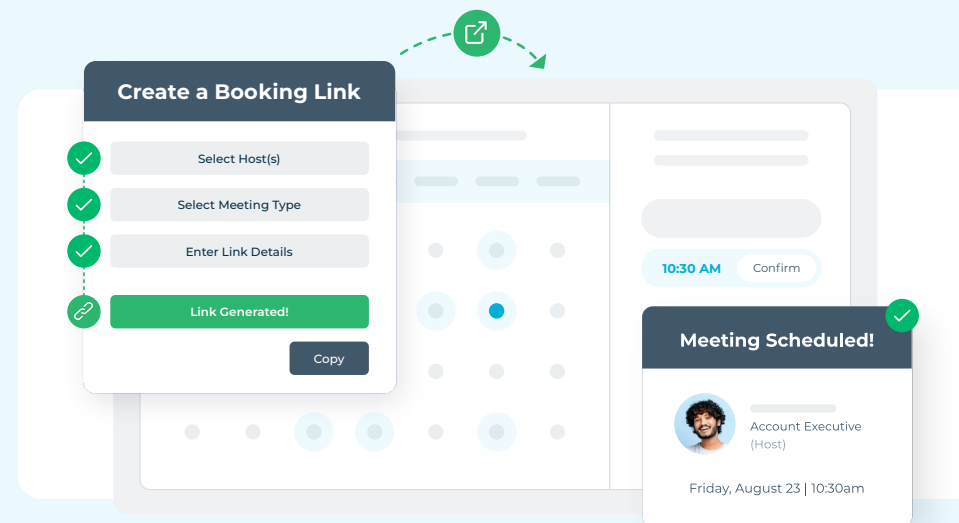
Automatic, Omnichannel Scheduling

Customize meeting bookings via webforms

You can also use BookIt to schedule meetings from forms, with multiple options for personalizing the prospect's experience. For example, you can embed a calendar on the form page or customize the confirmation page.

Send personalized scheduling links to prospects

BookIt enables personalized scheduling links that suggest the best times to meet. Send them automatically in chat conversations, populate web pages with them, or share them in an email.

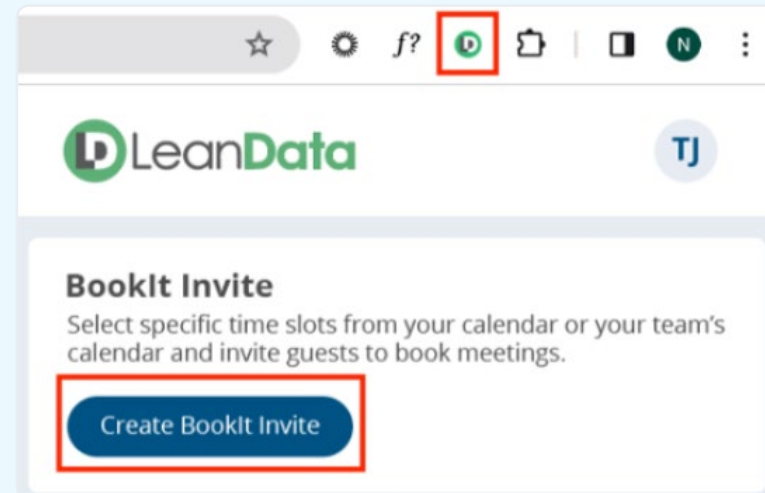


Automatic, Omnichannel Scheduling

Embed your preferred meeting times directly in messages

BookIt allows you to curate and embed your preferred meeting times directly within your emails, Outreach Sequences, and Slack messages, allowing your invitees to seamlessly schedule a meeting at the perfect time. Create them directly in LeanData BookIt or via the [Chrome extension](#).

[BookIt Invite Guide](#) >



Greater Flexibility and Control

Prioritizing Prospect Availability

Rather than a prospect being assigned a rep and then presented with available times, the prospect can view the availability of all appropriate reps first so that their availability is prioritized over Rep assignment. [Learn More >](#)

Integrate your calendars and conferencing tools

Connect LeanData to your Google Calendar, Microsoft Outlook Calendar, Zoom, and Google Meet for seamless scheduling across channels. [Learn More >](#)



Google Meet

Add Google Meet video conferencing links when a meeting is booked.

[Learn More](#)

Connect

Customize the scheduling experience with code snippets

LeanData already lets you create an on-brand experience with no code.

However, you can use custom code snippets to further personalize scheduling, overriding default field logic and adding additional customization to the way your calendars, forms, and confirmations look. [Learn More >](#)

```
thankYouPageHTML: '<div><h1>Hello World!</h1></div>';
```

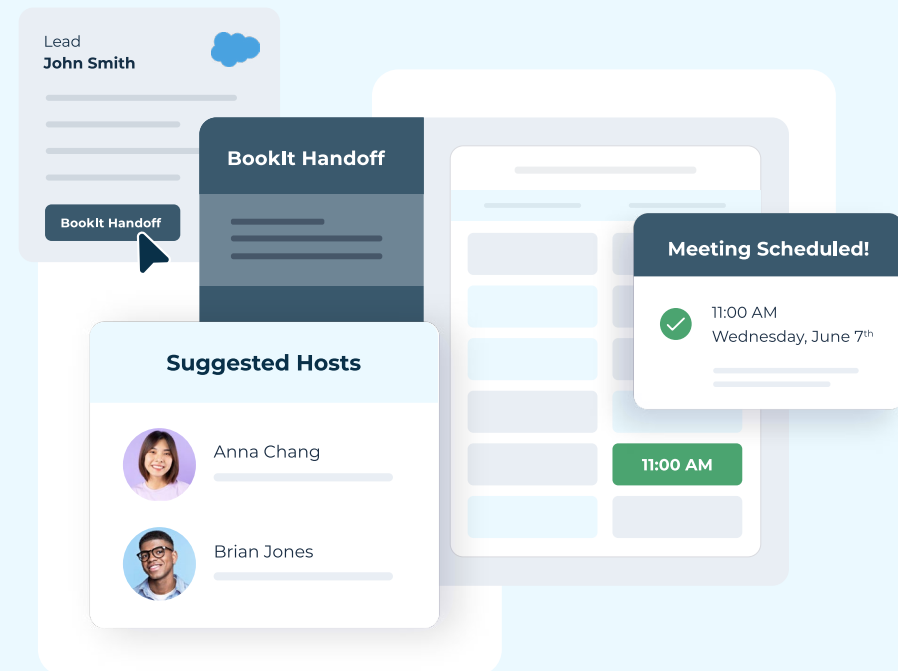
Relevant, Impactful Call Scheduling

Enable seamless scheduling with BookIt Handoff

Use customized logic to automatically suggest the right AE, round robin, territory, or group, based on your unique business logic.

BookIt Handoff gives Sales team members a more efficient way to schedule a lead's next call with a rep on the fly. Click a button to instantly see a calendar for the right reps based on LeanData's matching intelligence and your custom routing logic.

[See BookIt Handoff >](#)



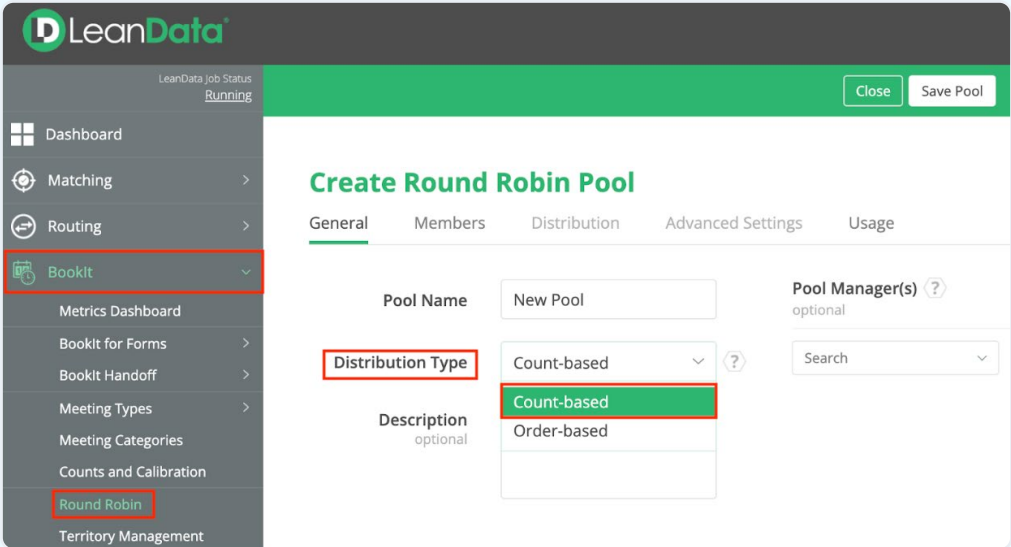
Relevant, Impactful Call Scheduling

Schedule meetings using count-based & order-based pools

When scheduling meetings using Round Robins in BookIt, you will often need to adjust the distribution to accommodate new team members, ensure equity across different meeting types, or issue meeting credits for reps who have invalid meetings due to cancellations or no shows.

LeanData lets you use meeting credits and enable order- or count-based pools for maximum flexibility.

[Learn more >](#)



SECTION 06

Engagement, Upselling, and Renewals

With LeanData, you can see how each lead, contact, or account is engaging with your campaigns, content, and sales outreach at a glance. Automate engagement sequences, trigger action, and alert reps when they should take action.



Automated Engagement

Engage leads and contacts with partner integrations

Create high-impact, automated engagement workflows with LeanData integration partners.



Add a lead or contact to an [Outreach](#) sales sequence.



Add prospects to [Gong Engage](#) and initiate actions based on intent signals.



Add people to [Clari Groove](#) flows to drive engagement across multiple channels.



Create plays in LeanData using intent signals from [Salesloft Rhythm](#).



Reach out when a prospect is ready for a meeting with [Kronologic AI](#).

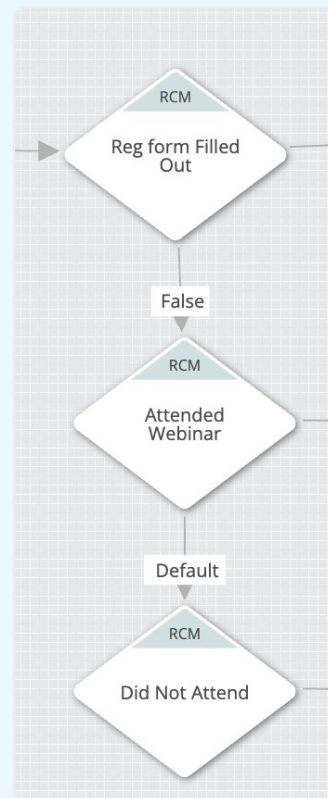


Distribute leads and contacts to cadences in [Salesforce Sales Engagement](#).

Automated Engagement

Alert based on webinar attendance

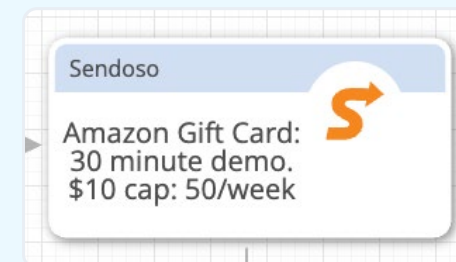
LeanData can automatically update contact records in Salesforce when they register for your webinars. If the contact is a customer, LeanData can also alert the right CS rep or manager as to whether the contact attended the webinar or no-showed.



Personalize gifting to prospects with Sendoso

The LeanData-Sendoso integration helps revenue teams orchestrate personalized gifting plays for their most valued prospects, customers, and accounts.

LeanData instantly routes records to the right rep and automatically sends tailored gifts based on contextual record information.



[Learn more >](#)

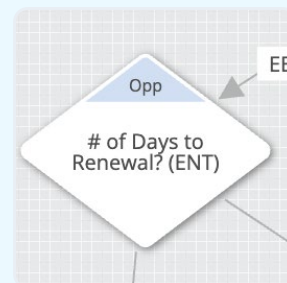
Automated Engagement

Find renewal opportunities

Help account managers find renewal opportunities by creating a regularly scheduled job that looks for accounts up for renewal in 120, 90, or 60 days.

Then, for accounts fitting that criteria, LeanData checks to see if the Opportunity is in the appropriate Stage. If not, LeanData will create a Salesforce task for the account manager and send an alert.

See how LeanData's Ops team sets up a [renewal motion >](#)



Identify opportunities for partner collaboration

Use LeanData's Crossbeam integration to find out when a new prospect overlaps with your partners' customers or prospects. Whether at the account level or the opportunity level in Salesforce, LeanData can examine an open opportunity, identify partner relationships, and create a task in Salesforce for the rep to initiate collaboration.

You can also send a Slack notification to the sales rep that includes partner context and next steps.



Learn More about
LeanData & Crossbeam



SECTION 07

Opportunity-based Strategies and Buying Groups

An Opportunity motion, or Buying Groups motion, recognizes that today's B2B buyer is a group of individuals, each with a role on the buying committee. Marketing engages these members, qualifies the group, and places it into an Opportunity for Sales. LeanData sits at the center of the tech stack, collecting signals, building the Buying Group, triggering plays, and moving deals forward faster.

"LeanData is like a Swiss army knife. We use it for data quality, for routing, and now for Buying Groups."



Jeremy Schwartz

Senior Manager,
Global Lead Management & Strategy



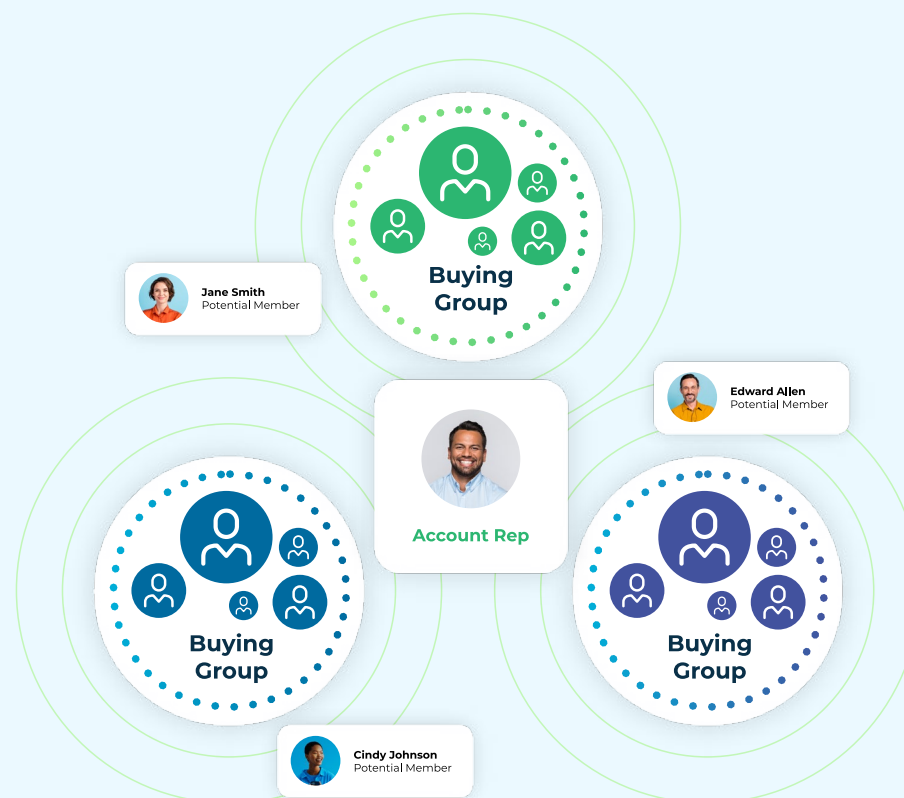
B2B Buying Groups: The Next Evolution of ABM

Traditional go-to-market approaches focused on marketing qualified leads (MQLs) and account-based marketing (ABM) are proving less and less effective in the face of complex buying processes involving multiple stakeholders.

A Buying Group motion based in Opportunities doesn't completely replace the Lead-centric or ABM models. Rather, it extends those motions, like a logical next step. This Opportunity-centric motion recognizes the collective decision-making process in B2B sales.

LeanData helps orchestrate a B2B Buying Groups motion by aligning sales and marketing operations, as well as enabling lead-to-account matching, routing, and opportunity management across a buying group.

[Learn about a Buying Groups Motion >](#)



Buying Groups Blueprint

Build a business case for adopting the Buying Groups motion

Buying Groups Blueprint uncovers and reports on the data that justifies moving forward with a Buying Groups motion.

Use LeanData’s Buying Groups Blueprint tool to analyze historical sales data, determine the likely impact and ROI of adopting Buying Groups, and establish baseline metrics for strategic rollout and ongoing measurement.

Buying Groups Blueprint delivers a detailed scorecard showing the key metrics and insights your organization will leverage to refine and optimize your Buying Groups strategy.

[Learn about Blueprint >](#)

Strategic Assessment	Buying Group Structure		
	Process Maturity		
	Persona Development		
	Organizational Buy-In		
System Assessment	Data Hygiene		
	Automation Complexities		
	Tech Stack Readiness		
Economic Rationale	Revenue Acceleration		
	Uncovered Opportunities		

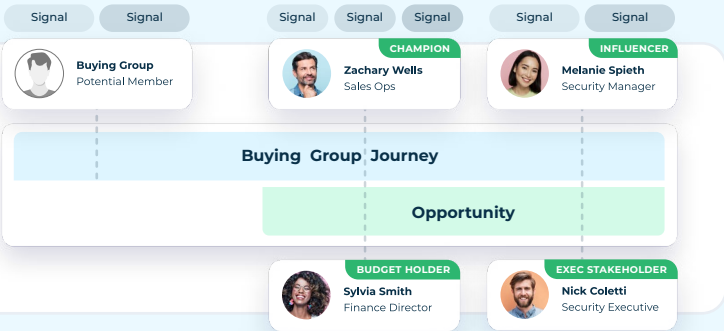
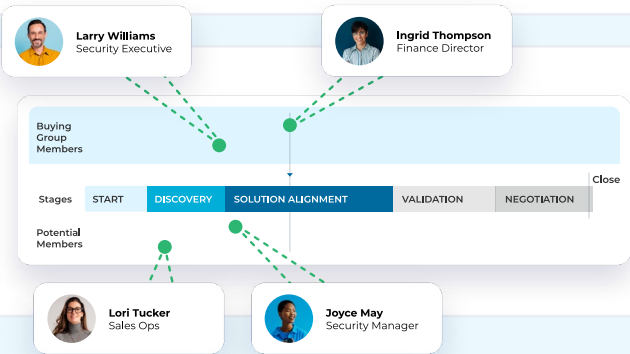
Buying Groups Edition

Built on the foundation of LeanData’s best-in-class matching and routing, Buying Groups Edition continuously populates Buying Groups, capturing buying signals and assigning members to roles even before an opportunity is created.

Buying Groups Edition introduces two powerful tools to operationalize a Buying Groups motion in your CRM.

Buying Group Journey Object

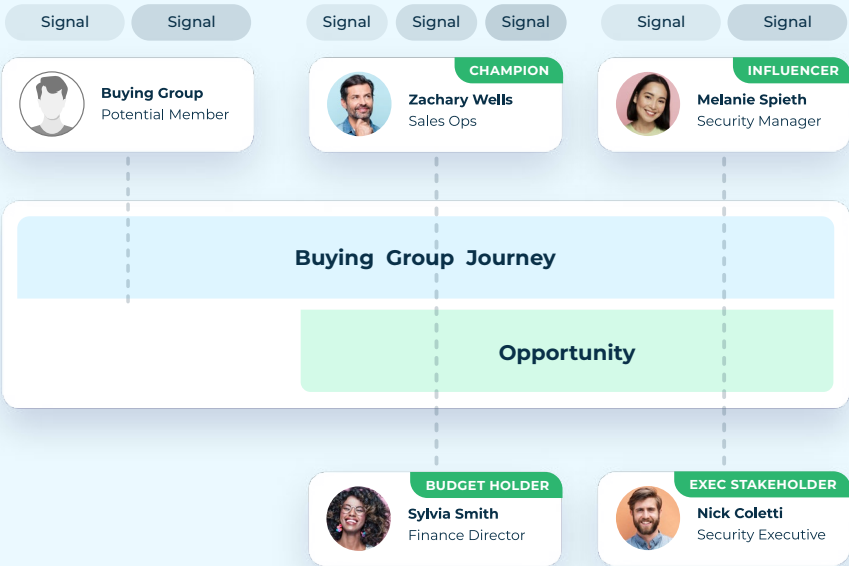
A custom object that tracks all signals and touchpoints of Buying Group members **from pre-opportunity to opportunity-close**.



Buying Group Visualizer

A visual tool that manages Buying Group Journeys by tracking Buying Group members (both identified and missing) by name, job title, contact role, and engagement signals.

Buying Group Journey Object



LeanData's Buying Group Journey is a custom Salesforce object, similar to an opportunity object, designed to provide visibility into all buyers involved in the decision-making process.

Key functions of the Buying Group Journey object include:

Insight into Buyer Roles: Buying Group Journey groups job titles to help understand what persona a lead or contact may fall under.

Pre-Opportunity Grouping: Buying Group Journey allows marketing teams to group potential buyers from an account into a pre-opportunity state before an official sales opportunity is created.

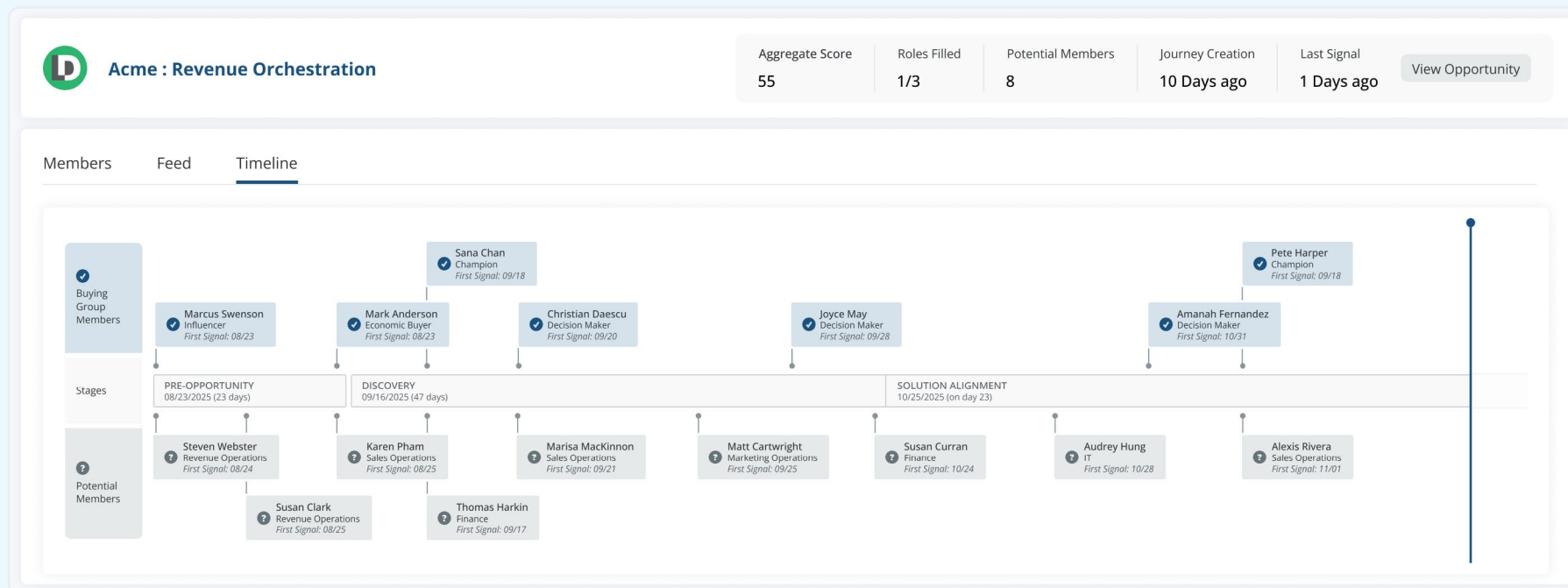
Seamless Handoff to Sales: Once the Buying Group reaches a customizable, predefined threshold, Buying Group Journey will route to a SDR/BDR or sales rep of your choosing.

Managing Gaps in the Buying Group: Buying Group Journey continuously monitors the Buying Group and identifies gaps, such as missing decision-makers.

Parallel Marketing and Sales Efforts: Even after the opportunity is open, Buying Group Journey continues to function, allowing marketing to engage with any missing or unresponsive decision-makers in order to advance the deal.

Buying Group Journey Visualizer

The Buying Group Journey Visualizer is a companion to the Buying Group Journey, providing marketing and sales key insights into the Buying Group, pre-opportunity to close.



SECTION 08

Boost Productivity and Collaboration

LeanData is flexible and easy to customize to your needs. Keep reading for a few tips on how to manage complex routing logic, streamline your workflows, and automate communication across teams and platforms.

“LeanData solves several key problems for our team, notably by automating lead routing and assignment, which saves time and reduces errors, ensuring quick and accurate allocation to sales reps. It also manages duplicates effectively, maintaining a clean CRM database with a single view of each lead. The platform automates workflows like lead scoring and follow-up reminders, standardizing processes and boosting productivity.”



Sarosh S.

Co-Founder

Mid-Market (51-1000 emp.)



User Review

Greater Efficiency in LeanData

Send Interactive Slack alerts

LeanData's interactive Slack tool NotifyPlus allows users to act on approvals, pipeline tasks, SLAs, and more without manually updating Salesforce.

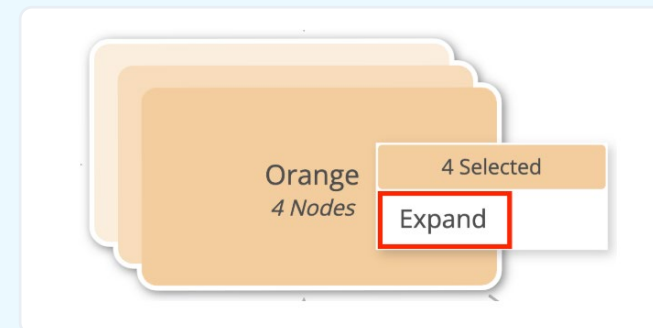
In addition, with NotifyPlus, users can automate the creation of specific Slack channels from the FlowBuilder graph. For example, one common use case is the automated creation of deal rooms.

When a new opportunity is created in Salesforce, LeanData can create a deal room in Slack for that opportunity and automatically add the relevant people to the deal room. Then, once the deal closes, users can set up conditions in NotifyPlus to archive the deal room.

[See LeanData NotifyPlus >](#)

Collapse and expand graph sections

Use LeanData's Graph Organizer to collapse and expand sections of your graph based on node color. It may sound simple, but this feature is a game-changer when it comes to organization.

[View the Graph Organizer >](#)

Greater Efficiency in LeanData

Reduce graph complexity with data table routing

When your routing graphs get too large or too complex, LeanData solves this challenge with data table routing. This feature combines the power of Excel with LeanData to reduce graph complexity.

Whether you're managing territories, mass-updating records, or using a ton of operators like greater than or less than, Data Table Routing makes this flexible and robust, incorporating multiple data points seamlessly into one node.

Fewer nodes mean faster updates and easier collaboration.

[View Data Table Routing >](#)

Routing

Data Table Management

Create and manage custom Data Tables to route or update records based on the conditions set.

[Create Data Table](#)

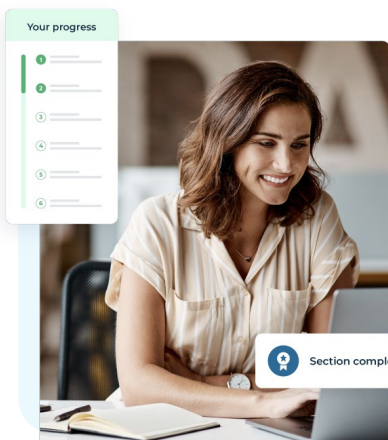
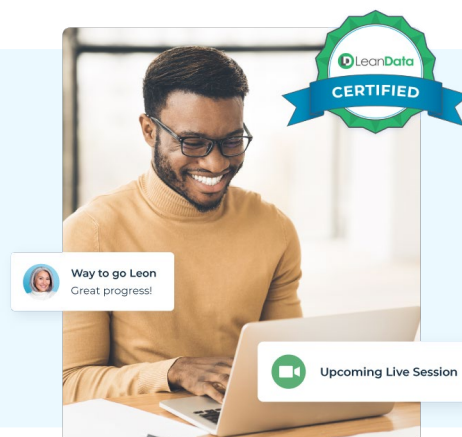


Next Steps: Improve your LeanData Skills

Want to expand your LeanData skills? Here are a few recommendations:

[Get Certified >](#)

Start with LeanData's official training and certifications. There are both instructor-led and self guided options.



[Explore the LeanData Learning Center >](#)

LeanData has a comprehensive knowledge base. Dig into FAQs, how-to guides, and troubleshooting tips to get familiar with common challenges and solutions.

"Have been using LeanData now for a few years with 2 companies. It provides a highly scalable solution to lead routing and lead to account matching. Most importantly, I don't need to bring IT to make updates or changes based on the business needs. We're now leveraging LeanData to facilitate a shift into a Buying Group marketing and sales motion."

 **Mike Saenz**



 **User Review**

About LeanData

LeanData on LeanData

FIVE POWERFUL REVENUE PLAYS FROM THE LEANDATA REVOPS TEAM PLAYBOOK

EBOOK



LeanData on LeanData



VIDEO

LeanData Tips & Tricks Video Series

Delivering Exceptional Customer Experiences

Optimizing Post-Sales Operations with LeanData

EBOOK



Delivering Exceptional Customer Experiences with LeanData

Get Started Today

Visit **LeanData.com** to learn more about LeanData's go-to-market operations solutions for Automated Scheduling, Matching, Routing and Buying Groups, or visit us on **AppExchange**.

Request Demo

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+ OpsStars worldwide, empowering them with revenue operations excellence that translates into compelling buyer experiences and competitive advantage. Join the movement!