



Digital Transformation Award

An individual, team or organization that has led a digital transformation initiative, introducing digital technology into an area of the business, changing how you operate and deliver value to internal teams and customers.

THE WINNER



The Challenge

Rockwell Automation was undergoing a major digital transformation, including a migration to Salesforce CRM. The company's lead and opportunity management systems were manual and inconsistent, which led to delays in lead follow-up and impacted conversion rates. Without automation, the go-to-market teams were siloed, and key processes were disconnected.

A lack of business ownership over lead routing logic created a dependency on central IT for changes, limiting the team's agility. Additionally, the company lacked visibility into and proper attribution for distributor-led opportunities. This lack of a standardized, automated approach was a significant obstacle to global operational efficiency and data-driven decision-making.

The Operational Approach

To address these challenges, Rockwell Automation launched a comprehensive initiative to modernize its go-to-market engine. The team's approach centered on three key pillars: technology implementation, process optimization, and team empowerment. They implemented LeanData to automate the routing of leads and opportunities and to support their buying group model. This was a critical step in standardizing their global processes.

The team then focused on organizational enablement, hosting numerous training sessions and office hours to build internal

expertise and reduce dependence on central IT. They certified and onboarded regional team members to manage lead routing and buying group creation. This strategic move empowered regional teams to take ownership of their own processes, fostering agility and responsiveness.

Finally, the project included a new partnership with Field Operations to align routing logic with the needs of frontline sales teams. The initiative also enabled the tracking of distributor-led opportunities in the CRM for the first time, providing crucial visibility and attribution. The entire rollout was driven by continuous feedback loops to ensure buy-in and rapid resolution of issues.

Operational Results

The transformation of the lead and opportunity management systems resulted in significant operational improvements and a shift toward a more agile, data-driven culture. The new systems are now owned by the business teams closest to the customer, driving measurable impact across the enterprise.

- Enabled CRM visibility into distributor-led opportunities for the first time
- Empowered regional teams to manage lead routing, reducing dependency on central IT
- Implemented a feedback-driven rollout strategy to ensure rapid adoption and optimization
- Certified and onboarded eight regional team members to build internal expertise
- Lead qualification reduced from seven days to under five minutes
- Reporting accelerated from a 48-hour delay to real-time

"Automating lead and opportunity management cut qualification time from days to minutes, but the real win is the ownership our regional teams now have. We've built both speed and accountability into the way we go to market. We now have alignment between sales and marketing and stronger communication across departments, which has never happened before in company history."

Amanda Shelley, Global Marketing Operations, Rockwell Automation