Lead Management Program Transformation of the Year (>1,000 employees)

An operations-led initiative that transformed the lead management engine, resolving architectural limitations in global scalability and process efficiency to create a solid operational foundation for future business growth.

THE WINNER

samsara

The Challenge

Samsara's previous, custom-built lead management system was reaching its limits for a scalable, global strategy. The system lacked the necessary flexibility and speed, with basic lead routing changes often requiring multiple weeks to implement. This level of manual intervention and delay was slowing the Marketing Operations team's ability to execute impactful business initiatives.
Unlocking the next level of performance required addressing key operational gaps, specifically around standardizing global processes, establishing clear accountability in follow-up, and implementing data-driven lead prioritization to ensure consistent outreach in partnership with their Account Development Representatives (ADRs) team. By capitalizing on these opportunities, Samsara aimed to improve down-funnel performance of Marketing sourced leads.

The Operational Approach

Samsara launched a Marketing Operations-led initiative to transform its lead management system. The team's approach centered on investing in new technology, streamlining processes, and empowering its ADR teams. They centralized lead management using the LeanData platform, which provided Marketing Operations with direct control over the lead funnel. This new system allowed the team to build nuanced routing rules and decision trees to ensure leads were distributed to the right owners. The LeanData platform was fully onboarded within a week.

With the new routing system driving more stability and consistency, the team focused efforts on supporting ADR outreach. They set aggressive SLAs based on a custom data science lead scoring model for each region. Leveraging internal tools like SamsaraGPT (a custom Samsara LLM knowledge base) and contextually-rich Slack notifications, ADRs felt equipped to work every inbound lead within the defined SLA windows. This achieved over 90% SLA attainment, resulting in a significant lift in conversion rates.

The flexibility of the new system also allowed the Marketing team to improve the customer experience throughout their entire journey. Enabling better personalization in nurture, sales follow-up, and digital activations. This included leveraging tools to improve scalability of nurture campaigns and AI agents to automate follow-up for colder leads. Finally, the team developed real-time dashboards in Tableau and Salesforce, powered by LeanData, to provide all stakeholders with critical visibility to drive more business impact between cross-functional teams.

Operational Results

The transformation of the lead management engine drove a significant improvement in key metrics across the business. The initiative addressed a major business opportunity and also created a solid operational foundation for future growth.

- Increased lead to opportunity conversion rates
- Supported YoY growth in pipeline
- Reduced speed to lead within 5 minutes
- Significantly reduced routing "dead-ends"

"By integrating our people, process, and technology into a new system, we achieved more than incremental improvements. We fundamentally unlocked growth for the business. Providing our ADR team the necessary tools, expanding our lead flow capabilities, and leveraging AI to personalize follow-ups has made our lead system not only more reliable but the foundation of our future growth."

Vic Molina, Manager of Marketing Operations, Samsara