

LeanData

G2 REPORT: LEAD-TO-ACCOUNT MATCHING & ROUTING

SUMMER 2026



INTRODUCTION

Lead-to-Account (L2A) Matching and Routing are software solutions that act as the connective tissue of today's efficient tech stack. As such, it's an essential component empowering the success of all revenue teams, regardless of both size and complexity.

With peer review sites like G2 rising to the forefront of B2B buying journeys, this quick-and-easy guide reviews the L2A Matching and Routing segment, and highlights LeanData's preeminent ranking as a pioneering leader in the category.

The undisputed leader in L2A Matching and Routing since its inception



G2'S LEANDATA LEAD-TO-ACCOUNT MATCHING & ROUTING PRODUCT PROFILE



LeanData

★★★★★ 4.6/5 (1,022)

LeanData simplifies and accelerates how B2B companies align go-to-market execution to the buyer journey. Powered by no-code automation, LeanData GTM Orchestration connects every play, process, and signal across your revenue engine — enabling precision, agility, and growth at scale. By coordinating the right actions at the right time, LeanData ensures that every lead, account, or buying group moves forward — helping organizations reduce complexity, drive higher conversion rates, and operate with complete confidence. Leading companies like Snowflake, Palo Alto Networks, and Okta rely on LeanData to eliminate routing errors, optimize performance, and turn GTM strategy into action.

What we offer:

No-Code Automation: Launch and update even the most complex workflows — instantly — with drag-and-drop orchestration.

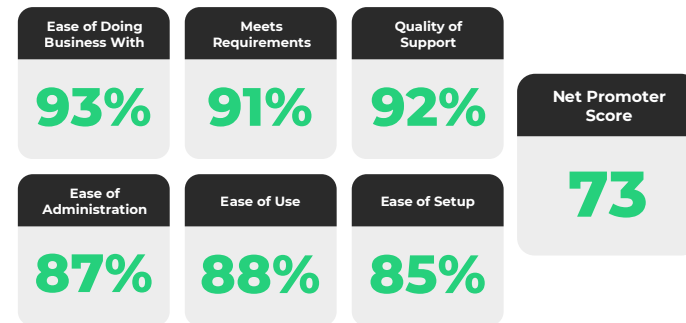
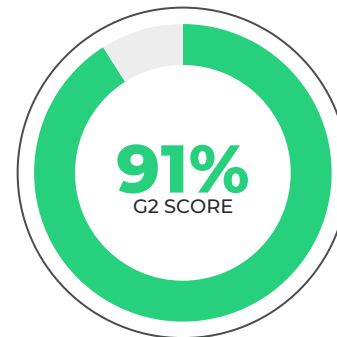
95%+ Matching Accuracy: Map every lead, account, and opportunity to the right place without manual intervention.

BookIt Scheduling: Instantly qualify, assign, and book meetings with the right team members — every time.

Buyer Journey Visibility: Track every interaction and handoff across the funnel for clean, scalable execution.

Actionable GTM Insights: Surface performance metrics to guide resource allocation, GTM strategy, and territory design.

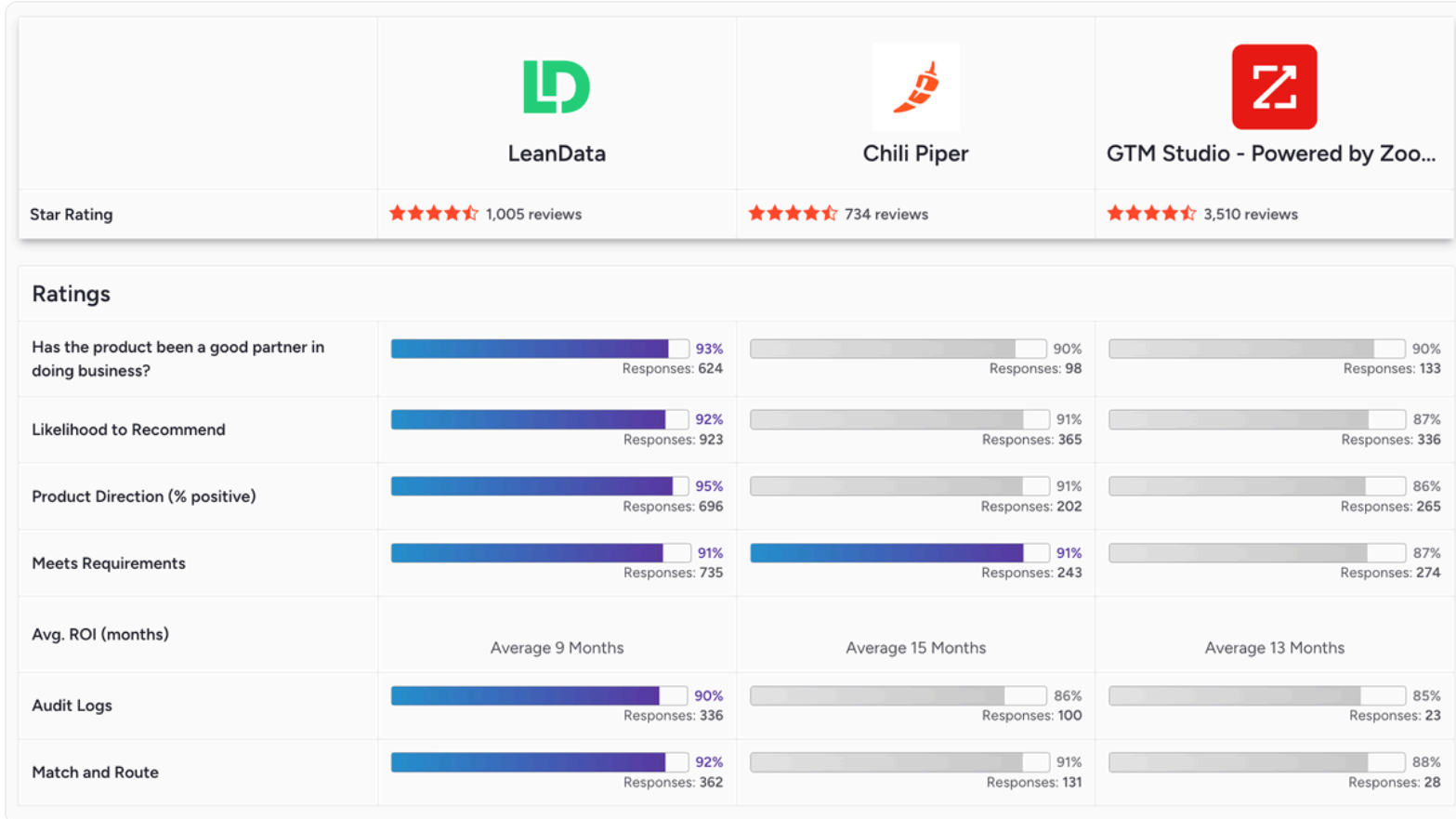
Enterprise-Grade Flexibility: LeanData adapts to your org structure, tools, and business shifts — without breaking processes.



99% of LeanData's 1,022 customer reviews on G2 are either 5-star or 4-star reviews!

RETURN ON INVESTMENT

Responsible growth requires an efficient tech stack that delivers a quick return on investment. According to its customers, LeanData delivers ROI quickest.



5/21/2026

“AI-ready GTM operations enabled by intelligent routing and automation: What I like most about LeanData is how it brings structure and reliability to complex GTM processes. It makes routing, ownership, and account matching consistent across teams, which reduces manual work and avoids confusion. It also helps keep CRM data clean and aligned, which is critical for scaling any revenue operations efficiently.”

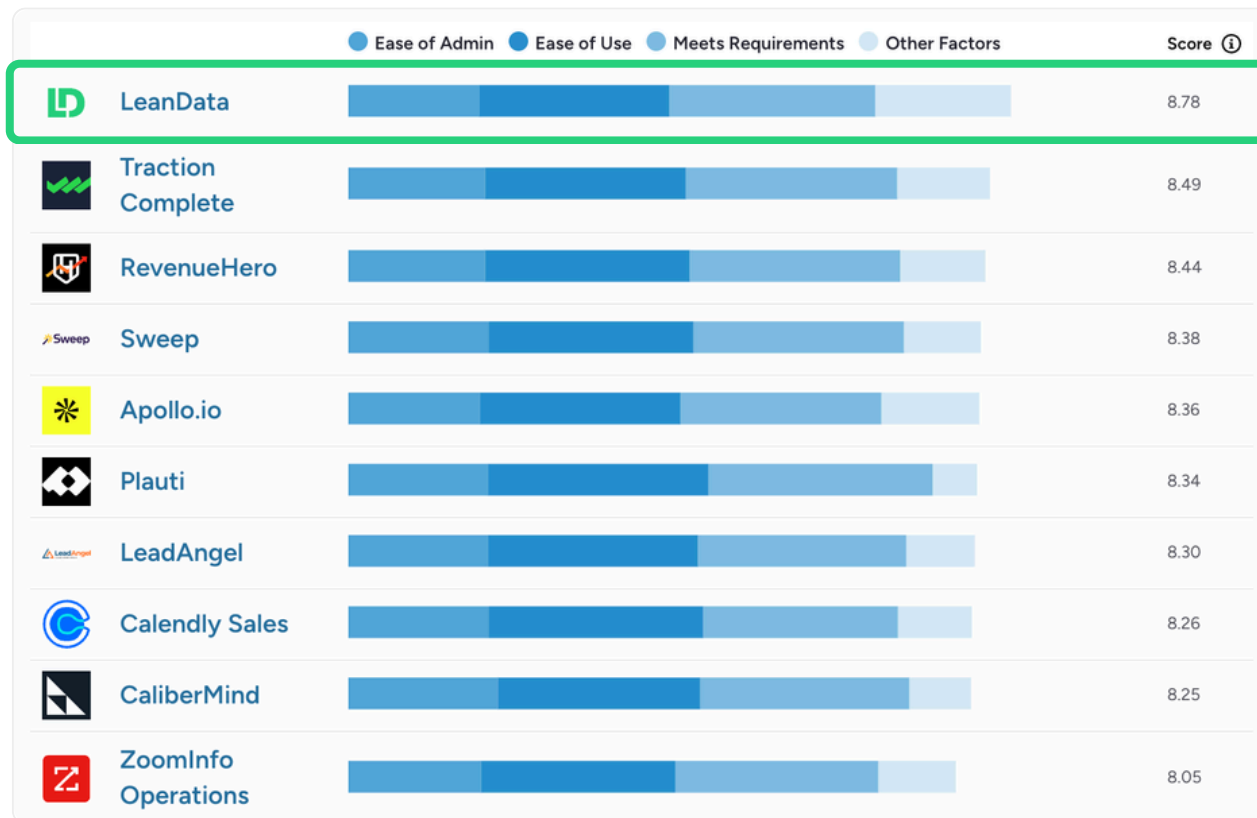
Verified User in Computer Software

Mid-Market (51-1000 employees)



EASE OF USE

Any software you buy should get the job done right, as fast as possible. But if the effort required is bigger than the reward, user adoption will be lacking. SaaS platforms that are easy to use gain more traction and thus are more successful. Customers consistently report LeanData’s no-code, drag-and-drop tools are easy to configure, easy to use, and easy to understand.



5/20/2026

“Excellent Graph Clarity and Fast, Safe Routing Drafts: The level of clarity you get from the graph is excellent—you can see exactly why a lead was routed to a specific owner or territory. Adding a new node (for example, round-robin hand-raisers to SDRs) takes minutes instead of hours. Updating territory assignments, swapping out individuals, and replacing people is quick too, and you usually don’t have to upload a new CSV file every time. I also like that you can build and test a new routing draft safely without risking your live, active sales engine.”

Verified User in Computer & Network Security

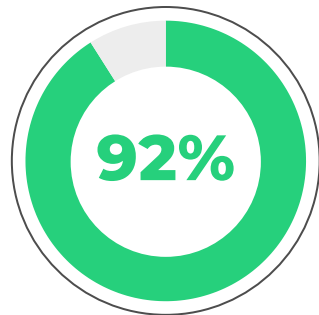
Enterprise (>1000 employees)



QUALITY OF SUPPORT

A good customer support team provides training and guidance to help customers make the most of their software. If customers encounter any issues, they deserve to get help and answers quickly and easily.

LeanData takes a “customer first” approach in everything we do. We truly believe if we focus on our customers, all else will follow. LeanData customers describe our Customer Success team as helpful, quick to respond, hands-on, and responsive.



Quality of Support
Lead-to-Account Matching & Routing

Additionally, LeanData’s Professional Services team is a clear differentiator in the space. Consider to following statistics:

<p>1,000+</p> <p>LeanData customers</p>	<p>100+</p> <p>go-live implementations annually</p>	<p>97%</p> <p>CSAT score for LeanData Professional Services</p>
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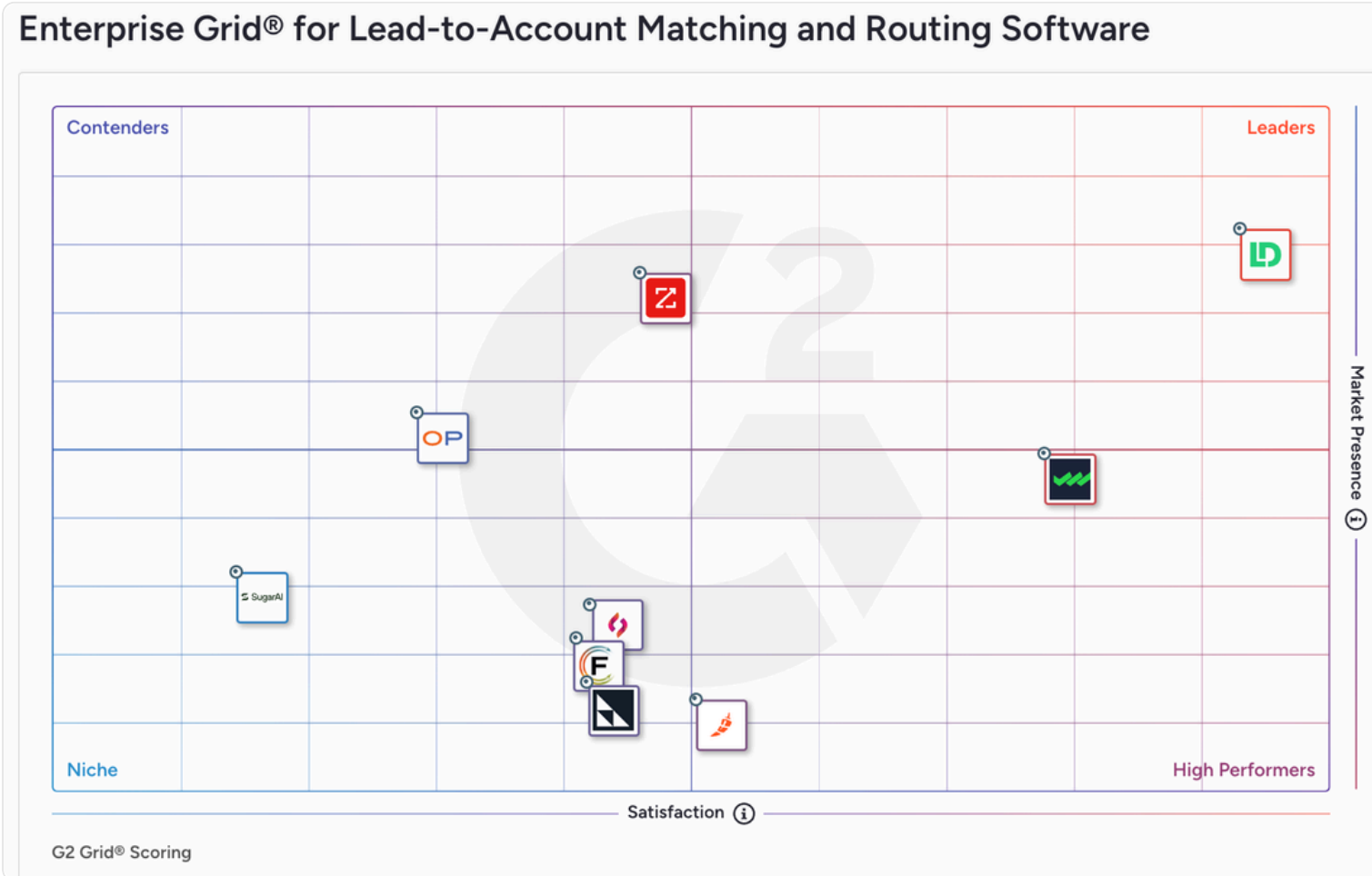


“LeanData Streamlines Lead Routing with Intuitive, Flexible Automation: LeanData helps streamline the routing and matching of leads, which makes our sales process more efficient. I appreciate how the platform improves data accuracy and cuts down on manual work through automation. The interface feels intuitive, and the routing logic is flexible enough to support our workflow without getting in the way. Overall, it’s been a valuable tool for strengthening our sales operations.”

Verche N.
Marketing Operations Analyst
Computer Software
Mid-Market (51-1000 employees)



G2 GRID SCORING



★★★★★ 3/5/2026

“Streamlined Lead Management and Cost Efficiency: I like how customer churning became more transparent for us with LeanData. It helps us with lead routing and calendar booking, which is super useful. We decided to replace Chili Piper with LeanData because of its consolidation of routing and booking tools, cost efficiency, and support for Salesforce objects. Setting it up was quite easy, which was a relief.”

Daria P.
Mid-Market (51-1000 employees)





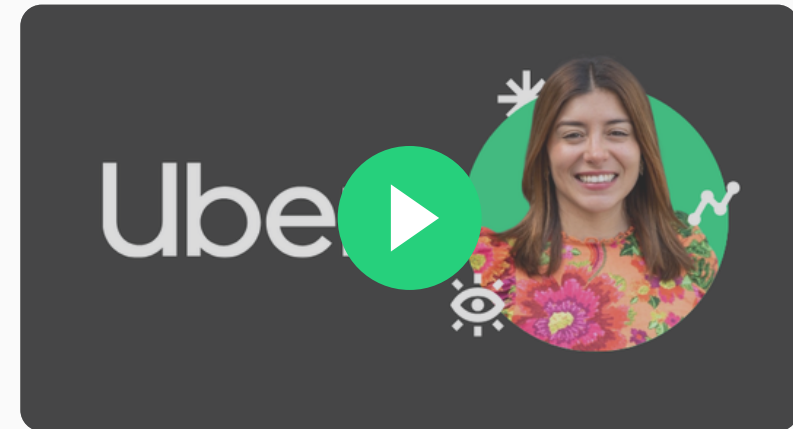
Customers Pick LeanData as the Best of the Best



HEAR MORE FROM OUR CUSTOMERS



**How Zoom Used Intelligent GTM
Orchestration to Break Down Operational
Silos & Increase Revenue**



**How Uber Increased Deal Velocity by 68%
with LeanData**

READY TO TAKE A LOOK AT LEANDATA FOR YOURSELF?

GET STARTED

WHY LEANDATA?

LeanData is the leading platform for AI GTM Orchestration, sitting at the intersection of AI agents, human sellers, and the systems they share. As the connective tissue across the entire revenue lifecycle, LeanData ensures every signal, whether AI-generated, system-triggered, or human-driven, is routed, actioned, and governed with the same rigor. The result is faster, cleaner execution and the ability to adapt GTM motions with agility without coding. More than 1,000 leading companies and a community of 5,000+ OpsStars rely on LeanData to translate GTM strategy into coordinated execution across customer acquisition, adoption, account retention and expansion.