LeanData

AI INFERENCE NODE

Bringing AI-Powered Reasoning to GTM Orchestration

The Challenge

Modern revenue teams capture enormous amounts of unstructured data – form submissions, call notes, survey feedback, closed-lost reasons – but routing automation has always been limited to structured field values. This forces ops teams to manually triage, classify, and sort records before any automation can take over. The results are predictable and costly:

- Speed-to-lead suffers as high-intent submissions sit in a general queue for hours waiting for a human to read and reclassify them.
- Competitive intelligence goes dark because win/loss data lives in free-text loss reason fields that no routing rule can successfully interpret.
- At-risk accounts go undetected because sentiment buried in survey feedback is invisible to structured automation.
- Dirty or incomplete data – missing company names, incorrect email domains, inconsistent field formats – causes misroutes that compromise rep trust.

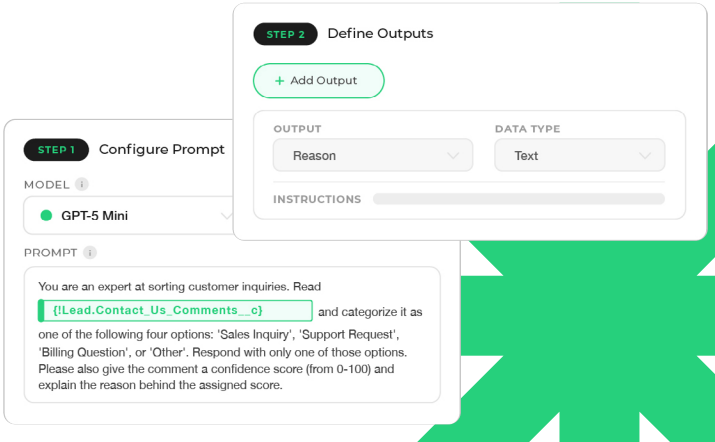
The Solution

The LeanData AI Inference Node brings large language model (LLM) inference directly into your FlowBuilder graph. Instead of routing based only on what a record contains, you can now route based on probabilistic reasoning.

The node accepts free-text fields from any supported Salesforce object, leverages the LLM of your choice (OpenAI or Google Gemini via your own API key), and provides a structured output that drives downstream routing decisions natively.

This allows ops teams to:

- Eliminate manual triage
- Automate data cleanup
- Turn every field into a routing signal
- Simplify graph maintenance



"One thing I love about the AI Inference Node is you can just build the model and then test it, and it's going to let you know whether or not it's working right there."

Linzy Cote
Revenue Operations Manager
Traliant

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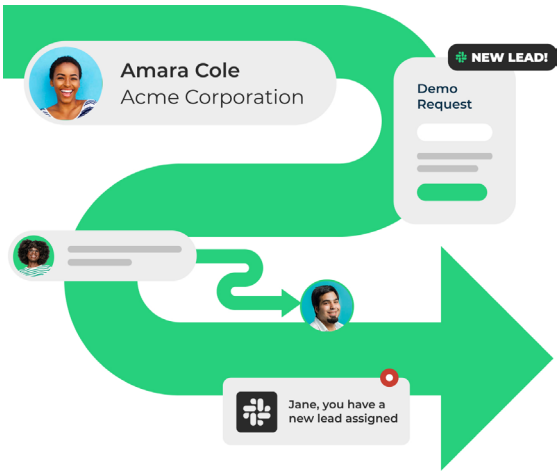
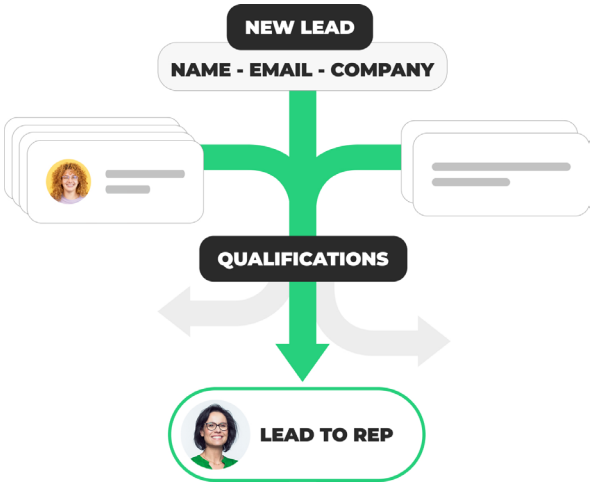
The AI Inference Node is a flexible building block with an infinite number of applications across revenue workflows. The use cases below are just a starting point for ops teams looking to analyze messy data and extract values for use within their routing logic.

Intent Categorization

Use the AI Inference Node to read free-text form submissions – “Contact Us” comments, chat messages, inbound notes – and classify each record into a routing-ready category (e.g., Sales Inquiry, Support Request, Billing Question, Partner Inquiry). Route the lead according to the output, sending high-intent leads directly to the correct rep, while diverting support and billing requests to the right queues automatically. This eliminates manual triage queues and drives a measurable improvement in speed-to-lead.



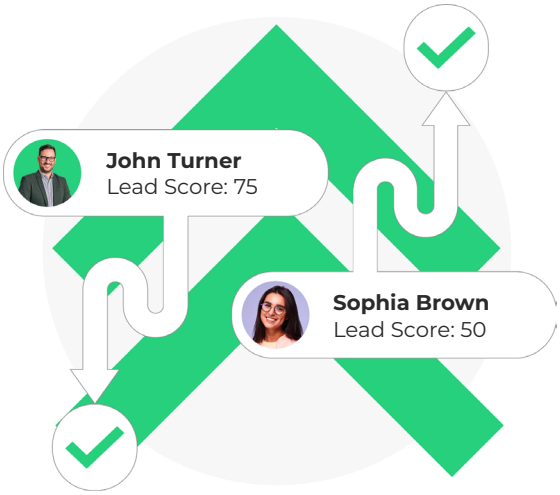


Data Normalization

Use the AI Inference Node to clean, extract, and standardize messy or incomplete field data before it reaches your routing logic. For example, you can extract root domains from email addresses, flag personal email providers, and identify company names when the Company Name field is blank. This allows you to replace dozens of brittle regex branches, and the normalized output immediately feeds your Lead-to-Account Match Node with reliable data – improving match rates and reducing misrouted records.

Lead Scoring

Use the AI Inference Node to synthesize multiple signals into a holistic assessment of a record. For example, you can leverage the node to assess a lead with additional context (e.g., their stated interest, ICP fit, target account status, account type) and produce a composite priority tier with rationale. This allows you to score a lead more accurately and route accordingly, prioritizing high-scoring leads and deprioritizing low-scoring leads.



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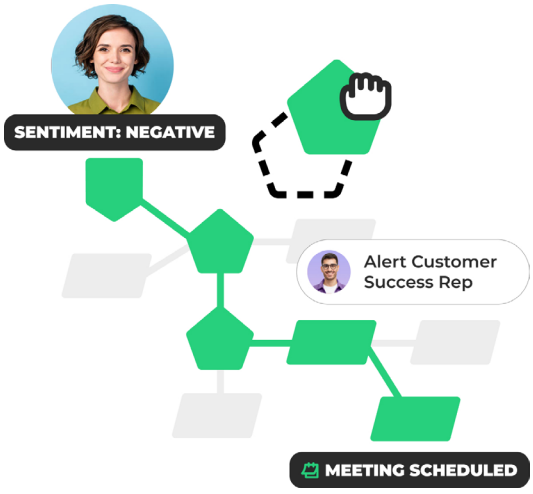
Competitive Extraction

Use the AI Inference Node to scan unstructured CRM fields – closed-lost reasons, call notes, opportunity descriptions – and extract competitor names and deal loss themes (e.g., Price, Feature Gap, Timing). The node handles misspellings, abbreviations, and indirect references to ensure competitive intel is captured. You can then write back the outputs to Salesforce fields and a trigger competitive nurture sequences and real-time Slack alerts.



Sentiment Analysis

Use the AI Inference Node to classify sentiment – survey responses, renewal notes, QBR summaries – as Positive, Neutral, or Negative. By instructing the node to treat hedging language and mentions of evaluating alternatives as Negative signals, it effectively catches at-risk accounts. Negative sentiment routes immediately to a Customer Success rep and fires a Slack alert, enabling timely intervention. This protects retention by surfacing churn risk at the moment feedback is received.

GET STARTED TODAY

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

REQUEST A DEMO

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.