

# LEANDATA + DUN & BRADSTREET

Unlock the Power of Account Hierarchies

## The Challenge

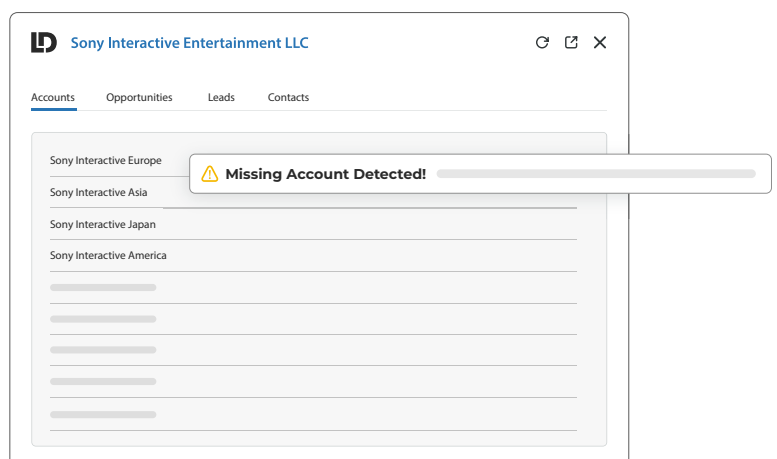
Enterprise organizations rarely sell into a single company. They sell into sprawling corporate families made up of parent organizations, regional subsidiaries, and sibling divisions spread across geographies and legal entities. But Salesforce only captures the accounts a team already knows about, and it typically only references the Direct or Ultimate Parent. The subsidiaries you haven't engaged, the parent that controls the budget, and the sister divisions ripe for cross-sell all slip through the cracks. Teams are left reconstructing the true corporate structure by hand – researching family trees in external tools, building missing Account records one at a time, and re-running reports – while expansion opportunities stay invisible and unworked.

## The Solution

LeanData Account Hierarchies, enriched with Dun & Bradstreet, provides a unified and dynamic view of the corporate family within Salesforce. By layering Dun & Bradstreet data onto an account hierarchy, revenue teams can see a more complete family tree including the entities that aren't in Salesforce yet.

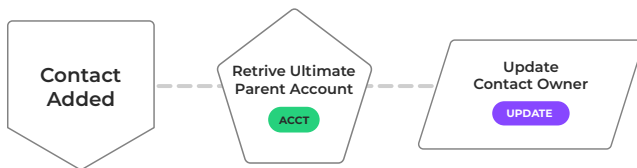
With a more comprehensive family tree in view, teams can easily work the whole organization rather than isolated accounts. In one click, a rep or admin can create a net-new Salesforce Account pre-populated with its D-U-N-S® Number, global-ultimate linkage, and firmographics. Sales can then target untapped subsidiaries and parents for expansion, and marketing can reach each entity with the right message.

Within LeanData's FlowBuilder, the Account Hierarchy Match Node allows organizations to orchestrate actions across an account family. By retrieving Account Hierarchy members to reference across routing logic, it enables precise assignment, record updates, and notifications based on how accounts actually relate. This means teams can manage accounts more strategically, stay aligned on ownership, and ensure no opportunity gets lost in a complex hierarchy.



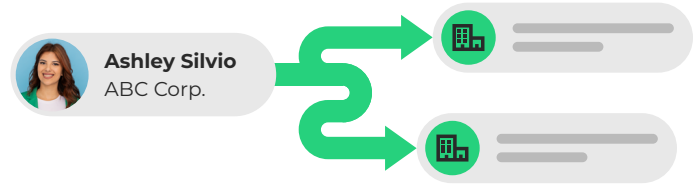
## See the Full Corporate Tree

- Automatically map, build, and maintain account hierarchies enriched with Dun & Bradstreet's legal-entity corporate linkage.
- View all related Leads, Contacts, Opportunities, Cases, and Tasks, in one place.
- Leverage filters to quickly find and act on specific related records.



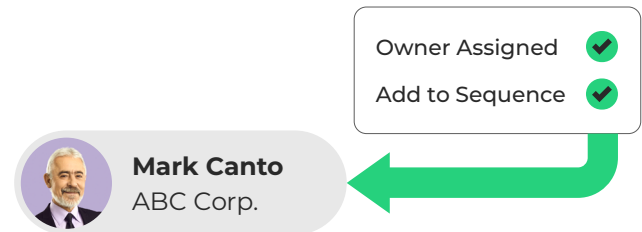
## Drive Smarter Engagement

- Define territories and inform account planning based on the true corporate structure.
- Deliver hierarchy-aware sales outreach across account families including subsidiaries, sister orgs, and parent companies.
- Segment campaigns by where an entity actually sits in the org.



## Enable Strategic Selling

- Surface hidden upsell, cross-sell, and expansion opportunities across account families.
- Access valuable context to plan and execute GTM motions faster and with precision – from acquisition to expansion.
- Trigger routing and record updates based on any Account Hierarchy member.



# GET STARTED TODAY

Visit [LeanData.com](https://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](https://AppExchange.com).

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.