OPENPRISE™

The Comprehensive Survival Guide

FOR

Lead Routing and Account Assignment

Almost every company has the need to route leads and assign accounts to sales reps in their Customer Relationship Management (CRM) system. It's about as universal a problem as you can get, yet it's also one of the most confusing subject areas in sales and marketing operations because every company uses unique routing and assignment processes, they change frequently, and there a lot of technical solutions to help automate these processes. In this guide, we'll cover the following topics:

- **Understanding basic routing and assignment use cases**
- **Identifying common business requirements**
- **Scoping your technology needs**
- **Selecting the best technology options**
- **Implementing deployment best practices**

LET'S DIVE RIGHT IN.

Contents

Understanding Basic Routing and Assignment Use Cases

Routing and assignment comprise a very broad category of use cases. Lead routing is just the tip of the iceberg. Think about all the different data you have in your CRM: almost all that data has to be assigned to one or more persons or queues.

While these use cases involve different data sets and different groups of people or queues, the basic mechanics of routing don't change much.

Here are some of the options you might need to consider:

- Routing a lead to a sales rep or a queue
- Assigning an account to a sales rep or a sales territory
- Routing a partner deal registration to a sales rep and a partner manager
- Assigning an opportunity to a service partner or reseller
- Assigning a salesperson's CRM role based on sales territory

For the sake of simplicity and readability, for the rest of this guide we'll refer to either "lead routing," or "routing," as a general representation of all the different routing and assignment use cases. And we'll point out specific topics specific to any these use cases as we go.

Identifying Common Business Requirements

While every company has a unique routing process, the basic rules that make up the total process tend to be standard across organizations. Here are the most common rules, which as you'll see, are often nested in different and inconsistent ways that add additional complexity.

Common Routing Rules:

By Company Size

By Geography

By Industry

By Account

By Business Unit/Technology Platform

By Customer and Product

By Round Robin, Load Balancing and Shark Tank

Routing by Company Size

In many companies, separate enterprise sales reps handle large accounts and commercial sales reps handle medium to small accounts. Sometimes an SMB rep handles the smallest of accounts. The division between Enterprise, Commercial, and SMB accounts is usually based on some kind of numerical attribute; the most common being annual revenue and number of employees. Specific industries may use more meaningful attributes that better represent the size of business, like:

- Size of the IT budget
- Number of vehicles in the fleet
- Number of storefronts / branch offices
- Number of rooms or beds in hotels and hospitals
- Number of students in a school district
- Number of hardware devices
- Tons of agricultural and mineral produced
- Number of trucks or container loads of goods shipped

The company size definition can vary by geography and industry. For example, a typical retail business may have larger gross revenue than other similar sized businesses, or a medium size bank in a large country may be bigger than a large bank in a small country.

Routing by Geography

Sales territory is most often defined by geography, so routing by geography is by far the most common type of routing rule. Geographical routing rules are often complex, involving a mixed bag of granularity: continent, country, state, county, city, metro area, postal code, phone area code, for example. The most common geographical divisions consist of:

- Defining US territories primarily as collection of states.
- Dividing large states like California into regions—like Southern California and Northern California, by ZIP code ranges, or counties.
- Carving out large metropolitan areas like Boston from the rest of the state.
- Subdividing very large metropolitan areas like New York City by postal code, area code, or county.
- Splitting European territories into collections of countries.
- Breaking out multilingual countries like Switzerland and Canada by linguistic regions.

In an extreme case—one of our customers divided Los Angeles by the I-10 freeway!

Routing by Industry

Many companies focus on or develop offers for different industries and use specialized sales teams to target those verticals. Public sector is a common "industry" that often requires a specialized sales team because of the way the government buys stuff and the tight ecosystem. Within public sector you often have sub-specializations like state and local government, K-12 education, federal government, military, and intelligence agencies.

You can also base industry routing on standardized industry data from vendors like Dun and Bradstreet, Orb Intelligence, or Bureau van Dijk, or SIC and NAICS codes.

Government and higher education routing often use domain suffixes like .edu, .gov, and .mil. Federal government routing often uses an even more specific list of domains consisting of civilian organizations that work extensively or exclusively with the federal agencies, like Mitre, Booze Allen Hamilton, and Lockheed Martin.

Routing by Account

Routing by account is conceptually simple. Just route the lead to the sales rep that owns the account. The challenge is how to match a contact to the right account, which is fundamentally a data quality problem. Some common challenges can arise when:

- The lead's company name is different than the account name: IBM vs. International Business Machines, or Apple vs. Apple Corp.
- The lead's email domain is different than the account's URL: joe@us.ibm.com vs. www.ibm.com.
- Multiple accounts use similar names or an identical domain. These may be duplicate account records, or different business units: IBM vs. IBM Global Services vs. Weather.com, an IBM Company.
- Multiple accounts represent country business units of the same company but have different URLs: www.ibm.com vs. www.ibm.jp.

Account with a parent company— multiple levels of parent companies—can make account ownership quite complicated. For example, most firmographic data vendors provide data for:

- Parent company
- Domestic ultimate parent
- Global ultimate parent

But even this data can still be insufficient, because there may be multiple layers of parent companies between the parent and the domestic and global ultimate parents.

Routing by Business Unit / Technology Platform

Large companies with multiple business units or acquired business often have multiple instances of CRM and marketing platforms. When a company acquires a lead, it often comes in through the wrong "front door." When a lead comes in to the wrong business unit or even just the wrong landing page hosted on a different marketing automation platform, that lead often becomes un-routable, or it gets routed to a sales rep who simply disqualifies it, since (a) sales reps rarely have an incentive to spend time and energy re-routing leads to the right business unit, and (b) it's no trivial task to reroute a lead to another business unit.

Companies that need to route leads across business units and marketing platforms often use data gathered on the interest and intent of the lead, like "I'm interested in these solutions …". This can be as simple as a picklist choice from a form, or there may be a need to decipher free-form text from a note or comment field.

Routing by Customer and Product

You almost always want to engage with your customers differently than the way you engage with prospects, even if the person you're speaking to is not directly engaged with your product just yet. Customer Account Managers (CAM, farmers) usually handle customers, while Account Executives (AE, hunters) handle new prospects. You may want to route customers (or former customers) to different product specialists.

To route a lead to a CAM or an AE, or to a product specialist, you need to know whether a specific account is a customer or former customer, what product they purchased in the past and what they're actively using now. For products with user information like software, you'll also need to know if the person is a user and of which product.

Routing by Round-Robin / Load Balancing / Shark Tank

Leads may not always be routed to a specific sales rep at first, but rather to a team or a queue. You can use different routing methods within each queue. Here are the three most common ones and how they compare:

- **Round robin distributes leads sequentially.** For example, if there are three sales reps in the queue, the first lead goes to the first rep, the second lead goes to the second rep, the third lead goes to the third rep, and the fourth lead goes to the first rep again.
- **Load balancing is a more sophisticated version of round robin.** You use some credit system to track the workload of each sales rep and assign the next lead to the sales rep with the lightest workload. For example, when you add a new sales rep, who has no leads at all, all the new leads will go to that new salesperson until their workload catch-es up with the rest of the team.
- **Shark tank is basically first-come-first-serve.** Once the lead is assigned to a queue, the sales reps need to jump on it and grab the leads off the queue before others do. Every coffee and bathroom break can potentially be costly.

Other Not-So-Unusual Routing Rules

Other routing methods we've seen based on:

- Who created the lead record and that person's role, for example. sales or support
- Whether there's an active opportunity or closed lost opportunity
- Whether there's been a meeting
- If there's a partner involved
- Whether it's a brand new lead or a re-opened lead
- Preferred language
- Related technologies used

Scoping Your Technology Needs

People

As with any project in business, to maximize your success you need to follow this sequence:

1. **People**
2. **Process**
3. **Data**
4. **Technology**

Figure out the people aspect first. Then ask these questions:

- Who's responsible for defining the routing requirements and process?
- Who's responsible for managing the requirements and "sorting out the details" on a day-to-day basis?
- Who's responsible for selecting the technology?
- Who's responsible for implementing and managing the technology day-to-date?
- Any other stakeholders you need to involve?

Process

Once you answer the "who" questions, you can move on to the "what" questions. What are the exact routing requirements and processes related to those routing requirements?

- Is there a service level agreement (SLA) that dictates how quickly a sales rep must act on a new lead before it gets rerouted to someone else, or gets escalated to management?
- If a lead can't be routed automatically, what's the manual backup process?
- If a lead is routed incorrectly, what should a sale rep do to reroute it?
- What's the mechanism to prevent leads from getting stuck in "black holes"
- Which process performance metrics and KPIs should measure and report on? For example:
  - Average number of leads owned by a sales rep
  - Average time it takes the rep to act on a new lead
  - Average number of times a lead must be rerouted due to SLA failure or routing error
  - Percentage of leads that can't be routed, or get routed incorrectly
- What's the process for requesting, approving, and implementing a change?
- If you use round robin and load balancing methods, how do you manage the following?
  - Sales rep out-of-office
  - Sales rep workload
  - Sales rep getting credit for bad leads and not abusing the system
  - Ramping up a new sales rep or sales rep returning from out of office
- If you use the shark tank method, what's the mechanism to control lead hoarding and over-aggressive behavior?
- What flexibility or willingness do you have to change these processes to fit the technology you choose?
- What's your data management process? See below for more about data.
- Is there a need to experiment and simulate different routing models?

Data

It's well and good to have the process and requirements defined, but you need data to drive your processes. Ask yourself these key questions:

- Do you have the data you need to support the process you want?
- Who owns the data you need?
- Which are the systems of record for the data you need?
- How can you access the data you need and what restrictions exist?
- If you don't have the necessary data, can you obtain it?
- If you have the data or can obtain it, is the data of good enough quality to support automation?
- How will you maintain data quality on an ongoing basis?
- If you need to acquire third-party data, who has the data you need? How do you evaluate which vendors have the most suitable data? (Notice we didn't say "best" data, but the data most suitable for you.)
- Who's responsible for managing all the data? Do you need a data steward?
- What's your data management process? See above about Process.
- Is the data you need subject to privacy and security mandates? If yes, what controls do you need to put in place within your process?

Here's a real-world story from an Openprise customer on why sorting out your data is so important:

Company M's Sales Operations team complained for years that they couldn't route leads accurately because they were missing a lot of data required for routing, including industry, company size, and address. For example, only 15% of the lead records in their CRM contains industry data. Despite spending money to acquire data year-after-year, the missing data problem never improved. After working with Openprise, the team discovered the reason: poor data management practices and scattered data ownership—sales ops, marketing ops, sales, and demand gen groups all independently acquired data. Additionally, all the acquired data was scattered across multiple sets of custom objects and custom fields.

Without spending a single additional dollar to acquire data, the industry data fill rate improved from 15% to 85%!

Openprise found ten different industry fields and six sets of addresses, along with many different phone numbers and emails. After implementing a data management process and a data unification exercise, Openprise unified these disparate data sets into a best-in-class data set that we then used to update the primary fields. Without spending a single additional dollar to acquire data, the industry data fill rate improved from 15% to 85%!

Lead routing is very much a data-driven process and it will never work well if you don't pay proper attention to the data.

Technology

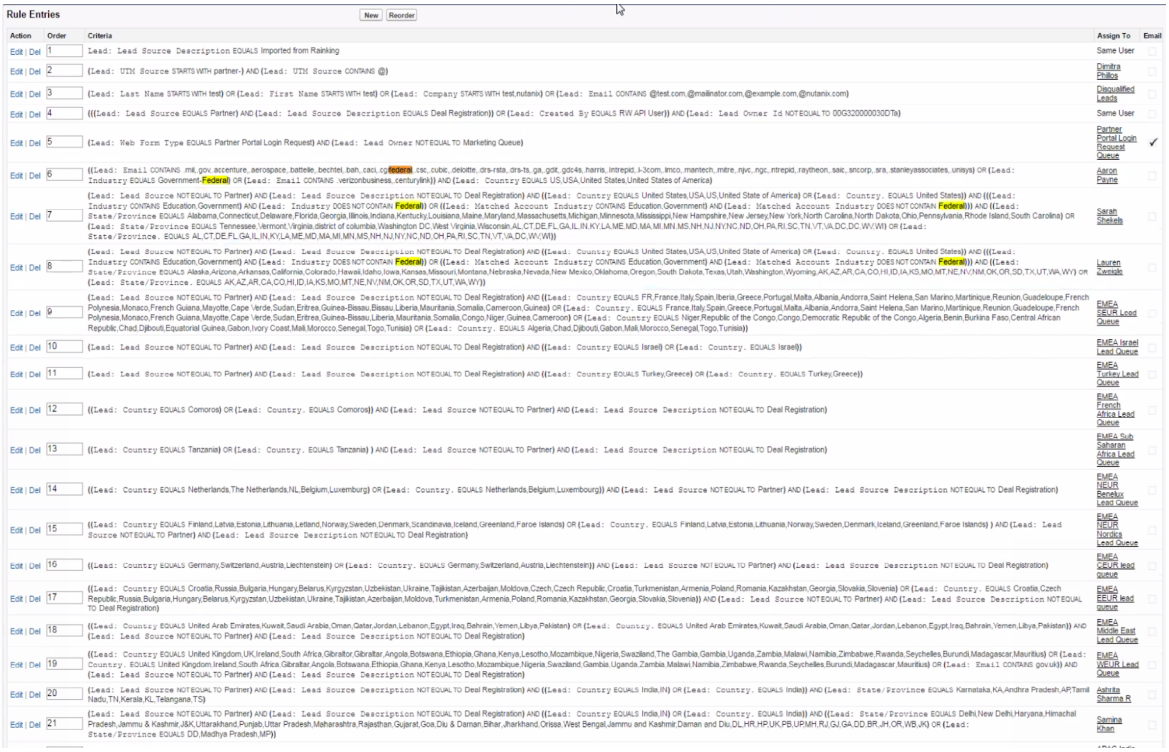
Once you've worked through any issues around people, process, and data, you're finally ready to address technology.

Selecting the Best Technology Options

Now that you have a firm grasp on your use cases and the routing methods your organization needs, you'll likely want to automate the routing process. So what are your options and what's the trade-off between these options?

CRM's Native Routing Rules

Most CRMs, like Salesforce, use built-in lead routing capabilities. If your routing requirements are simple, this option is a perfectly good way to go. As your requirements become more complex, these native routing rules can become quite difficult to manage. We call this *"spaghetti code."* The screenshot below shows an example from an Openprise enterprise customer. Sadly this is page one of five.



Since built-in routing rules are part of the CRM platform, you can't test and experiment in the production environment. So you typically make changes in a development box and test in a sandbox, before pushing the changes to the production box.

Custom Code

Some CRMs support scripting; Salesforce, for example, has its own APEX programming language. If the native routing rules can't handle the complexities of your routing process, you can always resort to writing code.

Pros:
Writing code offers infinite flexibility. If you can describe it to a developer, you can do almost anything.

Cons:
Writing code is also the most expensive solution. Updating custom code is almost always slow and painful. And when code changes hands, there's a good chance the new person would want to start over instead of maintaining the code somebody else wrote.

Recommendation:
Unless you have absolutely no other viable solution, we strongly recommend against writing your own code.

Purpose-Built / Point Solution

There are a number of good purpose-built lead routing solutions on the market. They typically handle some combination of the following capabilities:

- Lead-to-account matching
- Lead routing
- Account assignment
- Territory modeling

Some also include forecasting, attribution, and basic data quality capabilities.

Pros:
Can deploy a solution quickly and manage it without too much headache—provided you've got relatively clean data and standard routing logic.

Cons:
The complexity of the configuration can quickly escalate if your data quality is poor. We'll discuss this in more detail in the Best Practice section below.

As your routing requirements become more complex, you may also find yourself adding custom "plug-ins" to your out-of-box solution. Custom plug-ins are basically custom code your vendor writes for you. They come with all the downsides of custom code, plus the dependence you'll now have on your vendor to maintain the code for you.

Recommendation:
We strongly recommend against using custom plug-ins.

General Purpose Automation Platform

You can configure many general purpose automation platforms to route leads, namely:

- Data orchestration
- Workflow / enterprise service bus / business process management (BPM)
- Cloud integration

Pros:
Flexibility. The platforms can vary between no-code, low-code, to you-need-to-be-very-very-technical. But even the no-code platforms have much more flexibility than point solutions.

General purpose platforms can also handle a large variety of use cases on a single product, vs. the need to use a collection of point solutions. Having a stack of point solutions can introduce a number of technical debt related challenges, including:

- Overlapping product features.
- Synchronizing data silos introduced by each solution.
- Coordinating between independent point solutions.
- Managing multiple integrations to your CRM.
- Managing your CRM's API quota as each point solutions pulls the same data multiple times.
- Creating daily data quality issues If multiple point solutions update the same data.

Cons:
The learning curve. As with any enterprise software platform, it takes training and commitment to use it effectively.

Deploying a platform for a single use case probably doesn't make sense financially. If you can apply the platform to a number of use cases, you can offset the commitment and upfront cost against the long term savings derived from not having to buy and manage multiple point solutions. For example, in sales operations, you'd save substantial cost over point solutions by using a data orchestration platform for these purposes:

- Data quality
- Lead-to-account matching
- Lead routing
- Account assignment
- Territory modeling
- Account hierarchy construction
- Segmentation

Implementing Deployment Best Practices

To help you build the right processes and select the right technology for lead routing, let's discuss some common best practices, important questions to ask, and key design decisions to consider.

Implementing a robust, scalable, and manageable solution for lead routing can be tricky when you have:

- Multiple stakeholders and users
- Constantly changing lead assignments given the fluidity of the sales team
- A complex modern sales technology stack with lots of technical debt
- To execute fast

The consequences of an erroneous process can be costly.

Don't Forget About Data Quality

Lead routing and account assignment are great examples of data-driven processes. You need quality data to ensure the routing process has a high degree of accuracy and reliability. If your CRM data quality is already taken care of by another technology or process, then you have one less big consideration to worry about. If your data quality isn't great, you need to decide how to address this data quality prerequisite.

Option 1 is to pick a best-in-class data quality solution and a separate best-in-class lead routing solution.

Option 2 is to go with a single solution that can automate both types of processes. Refer back to our earlier discussions about point solutions vs. general purpose platforms. Many of the pros and cons discussed there are very much relevant here.

Effective Lead Routing = Quality Data + Usable Data

You may have accurate and complete data that's still not usable for lead routing. Here are three common examples:

- Company size is often used as a routing criteria. The definition of small, medium, large, and enterprise is unique to each company and even within a company, it can vary among different sales teams that focus on different geographical regions and industries.
- Should Puerto Rico be a country or a state in your CRM? It depends on whether Puerto Rico is covered by your US sales team or your Latin America sales team.
- Companies with some level of industry focus will require industry data to be more granular within the area of focus, and less granular outside the area of focus. For example, a company selling X-ray products will want granular industry data in healthcare and heavy industries, but may not care about verticals like retail and business services.

A scalable and manageable lead routing process needs not only quality data, but the ability to customize, combine, and interpret the data to meet routing and segmentation needs. There are two ways to approach this:

1. **The methodical approach:** make this part of your data requirement so your CRM database is not just accurate and complete, but has all the proper segmentation and data mapping to match the sales organization. This approach simplifies the routing process, and ensures all your processes, automation, and analytics are driven off the same data standard for consistent execution and measurement.
2. **The quick and dirty approach:** implement these data interpretation requirements into your routing tool as additional rules. The downside is that without a common database, this ad-hoc approach will create inconsistencies across different processes like attribution and scoring, and also make accurate analytics difficult. Point solution vendors often evangelize this approach to side-step the difficult but necessary discussion about data quality. This approach also increases the complexity of your routing logic significantly.

How to Deal With Dirty Account Data

When it comes to the lead routing process, the big pink elephant in the room that people don't want to talk about is dirty account data. Most companies' CRM account data is incomplete, inaccurate, and full of duplicates. Cleaning up account data is way more difficult than cleaning up lead data. Not because it's technically difficult, but it's politically difficult. We haven't met a single sales rep that will let their accounts be automatically deduplicated and merged. As a result, CRM account clean-up is always manual and tedious, even when assisted by technology. That means it rarely gets done.

So if part of your routing rules require matching leads to accounts and assigning leads to account owners, how do you meet that requirement when your account data is dirty and full of duplicate records? Similar to the data usability challenge, there's a methodical way of doing it and a quick and dirty way of doing it.

1. **The methodical approach:** clean up your CRM account data. Remember cleaning up account data is not technically difficult, but politically difficult. The trick is to clean up your account data outside your CRM and create a separate clean account master that resides in a separate database. This can be a standalone database, a data warehouse, a Customer Data Platform, or a data orchestration platform. This clean account master should be based on your CRM's account data and be cleaned and updated at least multiple times per day. All the processes and analytics, including lead routing, can take advantage of this single clean account master.
2. **The quick and dirty approach:** embed complex logic to sort through the dirty data as part of each point solution, including routing. All the issues with manageability, scalability, and consistency discussed above apply here as well.

Is Account Hierarchy Required?

Sales teams using an enterprise sales approach often need to route leads based on the target account's relationship to its parent and child companies. So it's necessary to understand the account hierarchy before properly assigning an account. For example:

- Assigning all accounts and leads to the Domestic Ultimate or Global Ultimate organization (borrowing Dun and Bradstreet terminology here)
- Assigning business units with less than 1,000 employees to a parent along the hierarchy with over 1,000 employees.

Firmographic data vendors can provide parent, domestic ultimate, and global ultimate data. To make this data useful for real-time automation, you need to prepare this data by mapping out the full hierarchy and appending the full-path information to each record, so each record can be standalone. If this is part of your account assignment or lead routing requirement, make sure your technology choice includes capabilities to prepare this account hierarchy data.

Do I Need to Buy Data?

The short answer is yes. In most organizations, lead data coming in at the top of the funnel is sparsely populated, often with just 5-7 basic fields like name, company, and email. Industry, annual revenue, employee count, address, domain—the data that's often required to drive routing decisions—needs to be enriched using third-party data providers. Since data can come into the CRM via multiple channels, depending on where and when the routing happens, you need to insert enrichment steps to fill out the necessary data before routing. If you have real-time routing needs, that means the enrichment process has to be real-time as well, and often tightly coupled with the lead routing process.

Once again, when designing your routing process with enrichment, you'll need to decide whether to use a single technology platform or a number of point solutions. Enrichment is a complex topic in its own right. To learn more about the nuances of enrichment, we invite you to take a look at **The Complete Data Enrichment Survival Guide for Sales and Marketing**.

Data Unification

Remember the Company M story from earlier? The company that improved its industry data fill rate from 15% to 85% after unifying its ten industry fields?

As part of the effort to understand whether you have sufficient data to automate lead routing, inventory your database to see what data may be hiding under the rocks. Unifying this scattered data may be the answer to solve your data needs.

Data-Driven Configuration vs. Hard Coded Logic

One of the key challenges to automating lead routing is how quickly business logic changes. Large sales organizations, especially in technology companies, seem to be in a constant state of flux. Sales reps come and go, sales territories get tweaked, SDRs in a round robin queue go on vacation. One key challenge we see is that the business changes faster than a company's ability to update its routing logic in their technology solution. Whatever technology you implement, there are two ways to set up your routing rules: hard coded vs. data driven.

Most companies hard-code their routing rules. Hard coding doesn't mean it's actually written code; it can be a rule or a configuration. But if even a small change in routing logic requires you to modify code or system configuration, then it's a hard coded configuration.

In comparison, a data-driven setup is one where a significant portion of the routing logic is driven by a set of data that's been externalized, so the behavior of the routing logic can be altered by simply changing the input data set. The system configuration only models the structure framework of the routing process, which doesn't change often, whereas the more granular rules, which change frequently, are externalized.

For example, the structural framework can be something like:

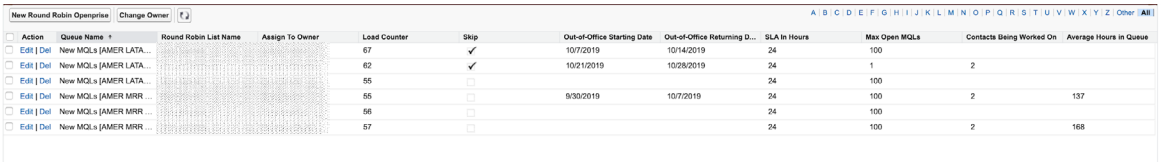
- California leads are routed by ZIP code
- Rest of the US is routed by state
- Europe is routed by country
- Rest of the world is routed by alphabet
- Public sector leads are routed by domain suffix and industry
- Federal government leads are routed by a list of domains

The actual mapping of each territory and sales rep to the individual California ZIP code ranges, US states, European countries, domains, alphabets, and the like, are externalized into a spreadsheet, a database, or a CRM custom object.

Here's an example of a simple spreadsheet that contains externalized routing data:

Rule Type	Territory Name	Country	State Province	Postal Code Min	Postal Code Max	SDR Email	AE Email	Alphabet
Special	Analyst							
Special	Investor							
Special	Partner							
Special	Media							
Special	Vendor							
Special	Competitor							
Special	Technology Partner							
State	Northeast	United States	New York, Massachusetts, New Hampshire, Vermont, Connecticut, Maine, Rhode Island					
State	Mid Atlantic	United States	Delaware, Maryland, Pennsylvania, District of Columbia, Virginia, West Virginia, New Jersey					
State	Great Lakes	United States	Ohio, Michigan, Indiana					
State	Southeast	United States	Florida, Georgia, Mississippi, North Carolina, South Carolina, Puerto Rico					
State	Central South	United States	Alabama, Arkansas, Kentucky, Louisiana, Missouri, Oklahoma, Tennessee, Texas					
State	Central North	United States	Illinois,Iowa, Kansas, Minnesota, North Dakota, South Dakota, Wisconsin, Nebraska					
State	Mountain	United States	Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming					
Postal Code	SoCal	United States	California	90000	93499			
Postal Code	NorCal	United States	California	93500	96054			
State	Pacific	United States	Alaska, Hawaii, Oregon, Washington					
Country	Canada	Canada						
Alphabet	A to C							a, b, c
Alphabet	D to J							d, e, f, g, h, i, j
Alphabet	K to Q							k, l, m, n, o, p, q
								r, s, t, u, v, w, x, y, z,

Here's an example of round robin routing rules and management parameters externalized into a Salesforce custom object:



Externalizing routing rules and parameters not only make a routing process more agile and manageable, it also enables the stakeholders who own the routing requirement to manage rules in a familiar environment, whether by spreadsheet or CRM page, and not have to learn a new routing tool, or rely on few trained users in IT or sales ops to make all changes big and small.

Batch vs. Real-time

What's the SLA for how quickly to route a new lead? This SLA will dictate whether you need real-time lead routing or can get by with batch based processing. While real-time lead routing provides better performance, it comes with a real cost. To route leads in real time, you'll need to implement a trigger in your CRM to detect when a leads get created and changed. Too many triggers can destroy your CRM's usability resulting in:

- Slow response time when making changes to a record or saving a record
- Reduction in batch size for all batch operations via UI or via API
- Longer time to complete any job
- Increasing difficulty and complexity in debugging any automation

So unless you absolutely must have real-time lead routing, we recommend using a batch process instead. Note that "batch process" can be frequent small batches that run every five minutes, not necessarily big jobs that run once every night.

Native to CRM or Standalone

In most cases, whether a solution is native to the CRM (native feature, native scripting language, or managed package) or a standalone offering has little consequence in whether it can meet the routing requirements, except when multi-platform routing is part of the requirement. If you need to route leads across different CRMs or multiple instances of the same CRM, you'll need to use a standalone solution.

Day 1 vs. Day 2 / New Lead vs. Reroute

Often routing requirements are different for a new lead (day 1) vs. an existing lead (day 2). Leads can require rerouting for a number of reasons, including updates to key attributes like address and industry data, or an SLA-mandated reroute because a sales rep sat on a lead too long.

We can't suggest strongly enough: document all your different new, reroute, day 1, day 2, wake-the-dead routing scenarios.

Routing vs. Full On-boarding

Is routing a standalone process or is it part of a more complex on-boarding process? For example, when someone signs up for a free trial, the full on-boarding process may look like this:

- Verify the person already exists in the CRM
- Verify the person's company already exists in the CRM
- Create / update / convert the lead with all necessary information
- Create / update the account for the lead with all necessary information
- Create an opportunity record
- Assign the account, lead, and opportunity to a sales rep
- Create a task for the sales rep to contact the new user in 48 hours
- Add new user to a marketing campaign
- Set up the new user in the product database
- Set up the new user in the security system

If the routing requirement is just another step in a full onboarding process that needs to be automated, make sure you evaluate candidate technologies with that full scope in mind.

Final Words

In most organizations lead routing is a mission-critical process. Automating lead routing can improve conversion, sales team performance, and sales team job satisfaction. Poorly automated lead routing using technology that's hard to diagnose, unable to scale, difficult to manage, and slow to update, can create a bad engagement experience for prospects, suck time and resources from your IT and sales ops teams, and create frustration for both sales teams as well as the folks who have to manage the process.

Following the framework and best practices outlined in this guide can help you create a better lead routing strategy, design a better process, select better technologies, have a more successful deployment, and make all your stakeholders' lives a little better.

About Openprise

Openprise is a Data Orchestration Platform. It solves the "garbage-in/garbage-out" problem to make data-driven anything possible in Marketing, Sales, and Support. Openprise automates critical data management processes including data onboarding, cleansing, enrichment, and unification across systems. Openprise is designed from the ground up for CRM, so it has the business rules, best practices, and data built right in, and it seamlessly integrates with solutions like Marketo, Eloqua, Pardot, Desk, and Salesforce, so you're up and running fast.

OPENPRISE™

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