TRACTION COMPLETE

THE ULTIMATE SPEED TO LEAD GUIDE

The 7 Step Strategy to Supercharge Your Speed to Lead

A strategy used by high-growth companies like **DocuSign, Asana, and Veracode**, who are breaking free from slow-you-down lead management in Salesforce.

Learn how to use automated lead-to-account matching and sophisticated lead assignment to dramatically boost your lead response times and accelerate revenue.

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What to Expect

SPEED UP & SELL MORE

In this guide, learn how to break free from the middle of the pack and make speed to lead and operational agility your competitive advantage:

- Take your revenue team closer to that golden conversion window of 5 minutes or less
- Make sure that lead handoff from marketing to sales is both efficient and accurate
- Create better customer experiences by responding first and responding right
- Feel confident that leads aren't going cold, and the money invested in demand generation and ABM strategies comes out the other side as revenue growth

> **"Leads go cold fast. People want to make quick decisions and you have to show that you're responsive and eager to do business."**
>
> **- Keith Hardwicke, Manager Salesforce Development**

Alfresco

You've got a need for speed.

It's that golden 5-minute window every Revenue Operations leader aims to hit. You know it. We know it. But winning the speed to lead race is hard when the average rep response time sits at a mediocre 42-hours, and you're letting potential leads slip through the cracks. Here's a breakdown of where you could be falling according to key statistics.

5 MINUTES

21x

more effective than calling after 30 minutes. Only 7% of companies respond in this window.

SOURCE

ONE HOUR

7x

times less likely to convert a lead in only an hour's time.

SOURCE

42 HOURS

You're here.

Don't know your lead response time? 42-hours is the average response time for B2B companies. That's two days....

SOURCE

NEVER

58%

of companies don't respond at all, and that's 100% a missed opportunity.

SOURCE

What's holding you back from speeding up?

SPEEDING UP YOUR LEAD RESPONSE TIMES CAN FEEL LIKE CLIMBING MOUNT EVEREST WHEN YOU'VE GOT COMPLEX, EVER-EVOLVING GTM STRATEGIES LIKE:

- Inbound and outbound demand gen
- Vertical strategies
- Account-based marketing
- Navigating large buyer committees
- Strategic partner channels and more

Speed to lead can easily get sidelined when you don't have the flexibility to evolve with your fast-changing GTM rules.

5 Signs You Need to Address Your Speed to Lead

1

The complexity of your GTM rules continues to climb.

With ever-evolving GTM complexity you need adaptable technology in order to reach peak response time.

2

You're doing things... manually?!

Blood, sweat, and spreadsheets are not effective strategies for fast follow-ups and revenue

3

Lead neglect and lost revenue. It's a real thing.

Stop resorting to catch-all queues where leads get lost, and opportunities are left on the table.

4

Revenue team alignment is still a struggle.

If your team isn't aligned, you're not efficiently driving conversion.

5

Bad customer experiences are killing your sales potential.

Enable your sales teams to make an impression that converts.

The 7 Step Strategy to Supercharge Response Times

It's time to move the needle and win the speed to lead race:

1. Measure
2. Match
3. Cleanse
4. Enrich
5. Route
6. Respond
7. Optimize

Let the race begin,
or jump ahead by clicking on 1-7 above.

1 MEASURE

SET YOUR STARTING LINE.

90% of companies don’t respond in the golden window of 5 minutes.

Where do you stand? Whether you’re just beginning the race to faster response, or you're a speed to lead extraordinaire, It’s imperative to know where your team currently sits on the rep response scale, so you can know exactly where to focus and what to optimize.

In other words, you can’t optimize what you can’t measure. And if you can’t measure, how do you effectively manage response times, or whether your team is responding at all?

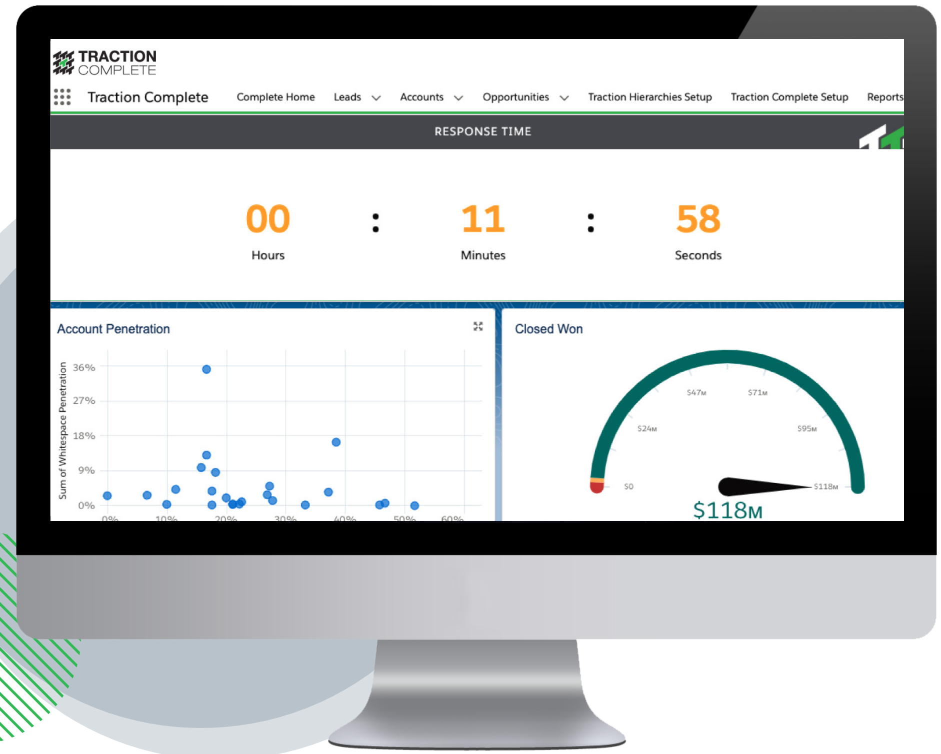
> “More than half of companies don’t even respond at all.
>
> SOURCE

Establish a baseline with a lead response timer and dashboard

Manually trying to decipher your reps' lead response times, or ignoring it all together, is not an option if you want to speed up. You need to create a culture of positive accountability.

The easiest way to do that is to use a response timer, and then capture your response data, allowing you to take giant hurdles in your race to faster response times:

- Capture key data on response times and report on exactly how long each SDR is taking to follow up from lead routing to first outreach.
- Create urgency and accountability amongst your SDR team by having a countdown timer directly on the lead page layout.
- Determine where the bottlenecks are in your response process with the Complete Response dashboard
- Visualize hot leads that are being neglected and immediately take action by sending a rep a reminder to follow up or re-assigning a lead to an available rep



Once you've established your response baseline you can then begin to lay down the appropriate strategy to move you toward the ultimate 5-minute response goal. Let's take the next step together.

2 MATCH

PROPEL YOUR TEAM WITH A POWERFUL MATCH ENGINE.

Accurately matching leads to accounts in Salesforce allows you to facilitate the best possible customer experience and close more deals. Here are a few key benefits:

- Uncover and understand existing customer relationships to respond more effectively
- Use existing relationship data for more accurate and effective routing
- Determine if new leads belong to a target account or not
- Match leads to other leads to ensure a single point of contact and reduce rep conflicts and double-ups
- Pull down data from a matched account onto the lead record

> **Getting a 20% higher lead to account match rate, we could make a case that it increased our close/won rate by 10-20%**

Keith Hardwicke, Manager
Salesforce Development

Alfresco

Matching isn't a nice to have, it’s a must-have for any modern go-to-market team.

TOPO Research (now Gartner) identifies lead-to-account matching and routing as having a 67% business impact, and nearly 80% satisfaction rating - both well above average when compared to 24 other top sales and marketing software categories.

VALUE SHOWS IN HIGH USER RATINGS

The category's benefits are delivering significantly above average impact and satisfaction scores.

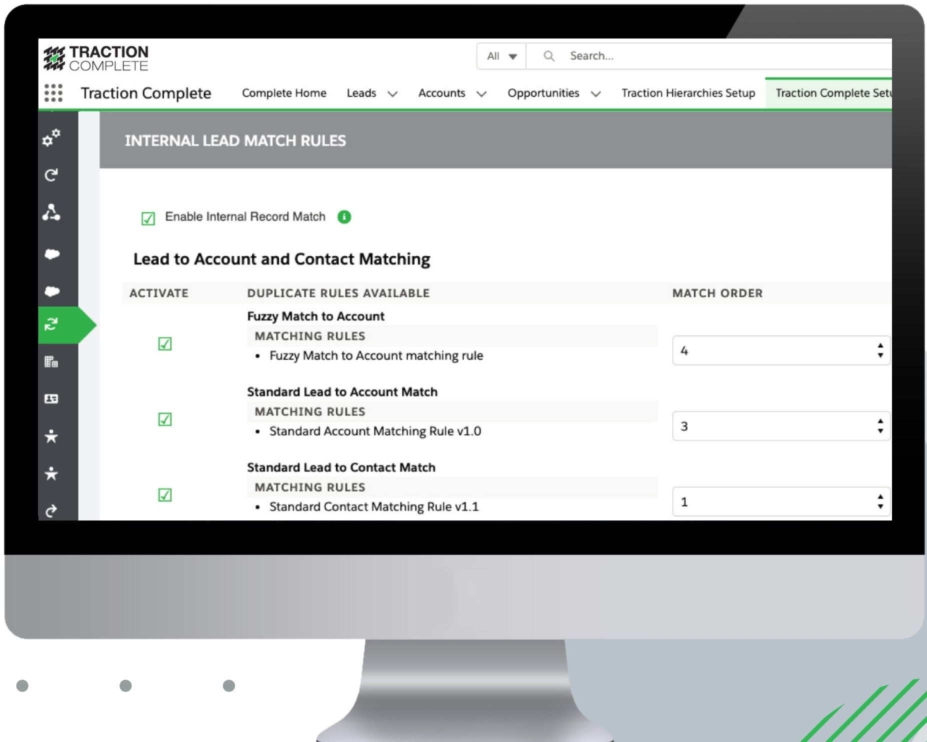
	IMPACT	SATISFACTION
Lead-to Account Matching and Routing	67%	78%
Average*	59%	64%
Rank in Tracked Categories	8th of 24	4th of 23

* Average is aggregated across all marketing and sales technology categories.

Meet Veracode, an application security company dealing with massive volumes of inbound leads.

A new lead comes in, but Veracode doesn't know who the person or company is, and it doesn’t appear to be associated with a particular account. Or so it appears.

Rather than having a rep ‘Google’ around in Salesforce trying to find a connection (if they do it at all), a powerful match engine automatically identifies a relationship and matches records based on the criteria they've defined.



THE RESULT?

- Increased accuracy of lead-to-account matching (for Veracode, by at least 18%)
- Sales and BDRs are able to move faster with the right leads
- Marketing managers are able to do ABM more effectively
- Fewer leads have to be manually assigned later

The must-do matching strategies to set you up for speed

EFFECTIVE MATCHING GOES BEYOND MATCHING ACCOUNTS.

Double down on lead response efficiency by implementing more sophisticated lead matching rules:

- **Lead-to-account matching:**
  The foundation of successful go-to-market teams.
- **Lead-to-lead matching:**
  Match leads to other leads from the same company when no account exists in Salesforce,
- **Any-object matching:**
  Create custom matches based on any object available in Salesforce
- **Hierarchy matching:**
  Match and route leads based on complex company hierarchies to ensure associated leads are routed to appropriate enterprise account reps
- **Customizable criteria matching:**
  Set priorities and custom tiebreaker rules to ensure lead matching aligns with your GTM directives

MAKE SURE YOUR MATCHING IS AUTOMATED.

Sourcing and connecting this data manually costs your reps hours each month and is a major contributor to lagging response times. Some reps will take precious minutes finding all the relative accounts and then manually pick the best match, wasting valuable time in their responses. Other reps won't bother checking for matches at all, which can end up in very awkward customer experiences and lower conversion rates.

Whether manually matching or automatically matching, a major consideration is which match is best when there is more than one account or contact to choose from with the same name. Easier said than done when all Salesforce customers are dealing with duplicate accounts, contacts and leads.

Stress not, there's an easy solution for that too.

3 CLEANSE

DON'T LET DIRTY DATA SLOW YOU DOWN.

The true cost of dirty data is one that many businesses typically underestimate, though they feel the sting on a daily basis.

The shocking truth is that:

> Dirty data is costing the typical company an average of $96 per duplicate.

SOURCE

A significant chunk of this data discrepancy comes from duplicate leads. So what do you do?

Companies who've caught on to this problem tend to solve it by simply blocking duplicates on entry, but this isn't a one-and-done fix and can end up slowing down and frustrating sales reps. You still have to go through and clean up the duplicate data that already exists, which is clogging up your database and making it impossible to have a single source of truth.

Break free from the clutter with data cleanup.

"Across the company folks were at their wit's end, trying to navigate a really complex data environment. And so we sought out a solution that could help us consolidate our data, to provide a clear and easy picture."

Here's how Windstream deduped with confidence:

- Matched their records to get a clear picture of how bad their data situation was. It was really bad.
- Built rules for real-time duplicate merging to stop the bleeding and not slow down their sales reps from selling
- Used a mass cleanup tool to identify and merge duplicate records that were clogging up their system

THE RESULTS?

"We went from 6 million records down to 200,000. It's helping drive strategy for every side of our business.

Scott Ellsworth, VP Sales Operations

windstream

Clean and connected data are wings on which your response times will soar. But it's more than wings that are going to get you off the ground.

4 ENRICH

HIDDEN INSIGHTS TO HELP YOU SELL SMARTER & FASTER

Enrich your data with a third-party data provider.

DocuSign has complex go-to-market rules and many lead sources that put them at risk for frequent misrouting and massive amounts of manual effort. To grasp a complete picture of a lead, they need to know the following data points, and in real-time:

- Business address
- Employee count
- Annual Revenue
- Industry
- Parent account data (more on this later)

If you're anything like Docusign, sourcing this data manually isn't an option when you're putting the pedal to the medal in the lead response race. Automated enrichment is key.

Even one less field can improve conversion by 26%, so the general rule is the fewer fields the better - with three being the most ideal.

Here's where the rubber meets the road. When you don't have all the information on an incoming lead, your efficiency dramatically drops:

- Wasted time on searching for missing lead data
- Leads won't be assigned correctly according to your go-to-market rules
- Reps don't have visibility into parent account relationships or additional history
- Custom match rules don't have all information at hand to create the best match

> **Traction Complete has dramatically reduced errors in our lead routing process and helped us execute quicker and faster dupe checks. Before, lead data such as zip code, industry, employee count had to be inputted manually. Now, this lead data is pulled directly from our data provider and automatically populated within the lead record.**

Hazel Tran, Director Global Territory & Sales Ops

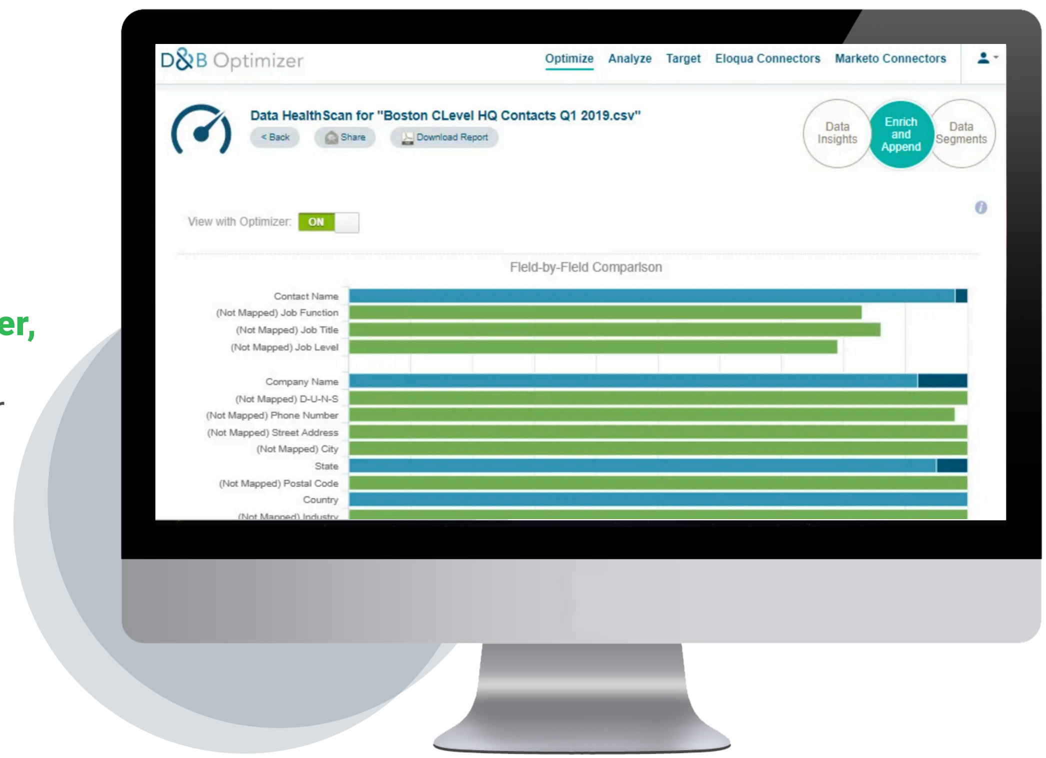
DocuSign

THE BOTTOM LINE?

To speed up response and ensure leads are routed in accordance with your GTM rules, you need detailed firmographic data enriched automatically.

The market leader in firmographic data, **D&B Optimizer,** allows you to tap into an incredible source of firmographic data - pulling in company data onto your leads automatically, boosting routing accuracy and giving reps greater visibility in Salesforce.

And it's all without asking prospects to fill out additional fields that tank your web to lead conversion rate.



> Adding Traction Hierarchies (with D&B) to the mix filled the gap and we were able to assign missing industry groupings to a large percentage of our accounts.

Sharlet Wentzell, Senior Business Analyst

PROTOLABS
Manufacturing. Accelerated.

SOLVING THE HIERARCHY PROBLEM

Further complexity arises when leads come in that are a subsidiary of a larger business. Here's a common scenario:

BlueJeans is a $100M screen-sharing platform based out of California, but it turns out that they are owned by Verizon; a multi-billion dollar business based out of New York. Without leads being enriched with account hierarchy, BlueJeans would have been routed to a mid-market rep in California. The end of this story is less than ideal but all too familiar; Ops teams wading through territory conflicts and commission splits.

For Ops leaders, Traction Complete's integration with D&B Optimizer is a win when solving for complex territory and hierarchy routing. Enriching data from the parent, domestic, and global ultimate company allows them to more accurately route leads and dramatically reduce territory conflicts.

Want to make Account Hierarchies even easier? Check out Traction Complete Hierarchies.

> Complete Hierarchies is a game-changer in the world of territory disputes and messy account hierarchies.

Hazel Tran, Global Territory Strategy

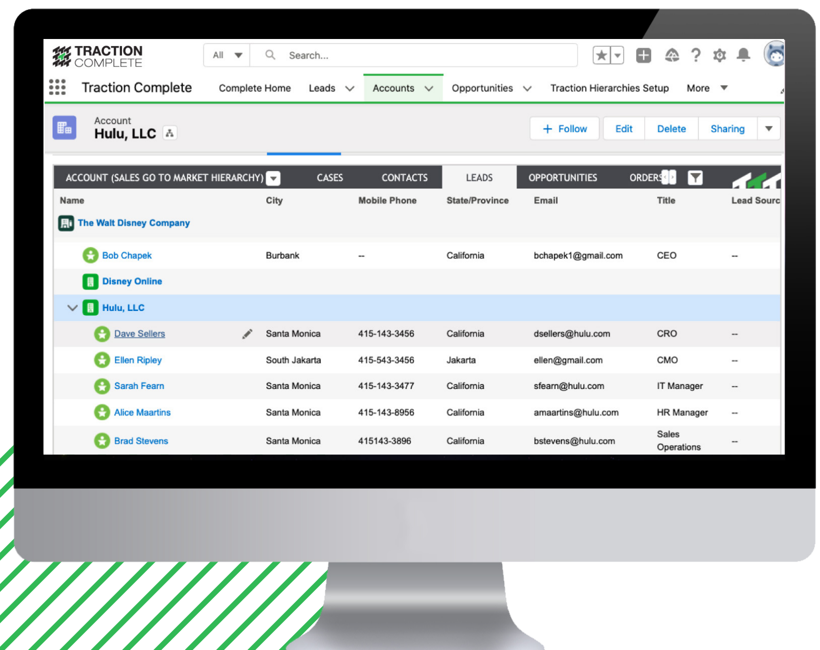
DocuSign

ENRICHMENT HOT TIP:

In order to take full advantage of your tech stack and the data you have available, it's best to delay lead matching and routing until after your data has been enriched.

This ensures lead routing and assignment decisions are made based on a total picture of company information, not just the data coming through from your lead capture fields.

Now that we've got a solid lead match and enriched data, let's look at how to get leads to the right rep in real-time with routing.



5 ROUTE

GETTING THE RIGHT LEAD TO THE RIGHT REP

> **The problem we had is that we were growing fast, and our previous routing tool didn't scale with us.**
>
> Chris Burger, Head of Revenue Operations

asana

If you're anything like Asana, you're dealing with:

- Incredibly complex territory rules
- Changes to sales team because of growth and turnover
- Increasing volumes of leads that are impossible to keep up with
- Multiple systems (CRM, Marketing Automation, Website, Traffic monitors, tech stack integrations etc)
- Multiple teams involved in the process (Marketing, Sales, CS, Operations)

This led to an inability to effectively route leads, and accounts that needed to be reassigned daily according to their GTM rules.

Asana's Speed to Lead Revolution

With sophisticated automated matching and routing, Asana was able to:

- Accomplish complex workflows that match their evolving GTM
- Re-assign based on opportunity ownership and custom object routing
- Leads, contacts, opportunities, and accounts get aligned and assigned to the right reps at the right time
- Easily make changes to their routing logic without the need to involve IT

> **It wasn't just the functionality we loved about Complete Leads, but the usability within those functions.**

Chris Burger, Head of Revenue Operations

asana

Getting Serious About Speeding Up

Let's take a deeper dive into 5 routing strategies that boosted response times, assignment accuracy, and ultimately helped Asana, and other high-growth companies, create better customer experiences and close more deals.

1. Account-Based Assignment

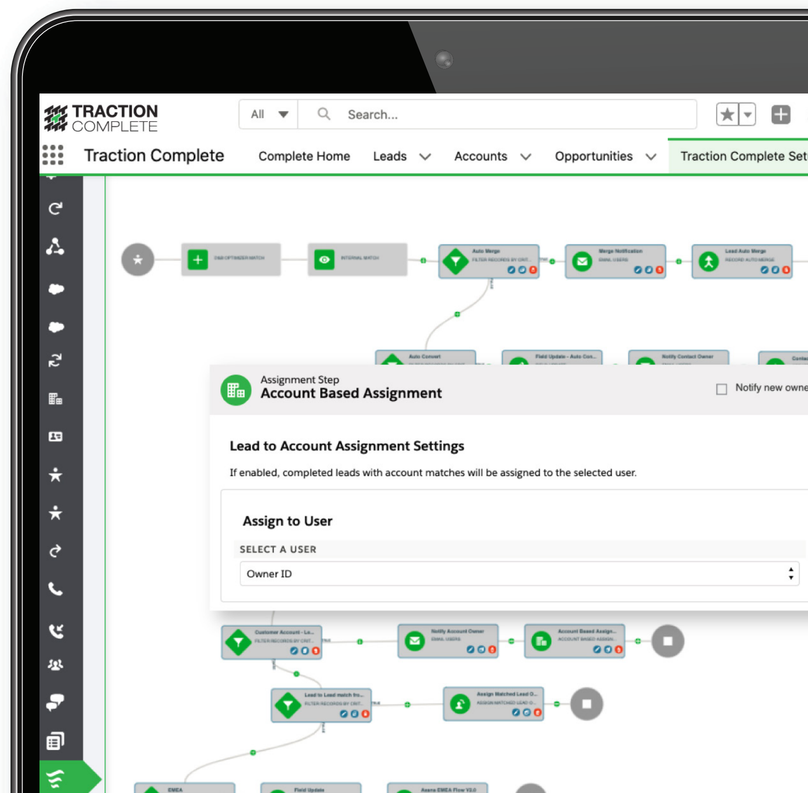
Alfresco was able to **increase their close/won rate by 10%** with a more robust account-based assignment solution to align with their account-based selling and marketing strategies.

To start, they needed a highly accurate account matching tool to ensure that leads from target accounts were being routed correctly to the owner of the account. Not wasting away in a queue or their marketing automation tool.

Here are 4 signals that you, like Alfresco, need account-based assignment in your organization:

- Reps wasting too much time on territory conflicts and re-assignments
- BDRs calling into target or customer accounts accidentally
- Junior SDRs responding to inbound leads inappropriately and creating bad experiences
- Leads are being totally neglected in queues

These people are living, eating and breathing their accounts
them inside and out, and naturally have the highest chance
conversation into a converted pipeline and revenue.



2. Territory Based Assignment

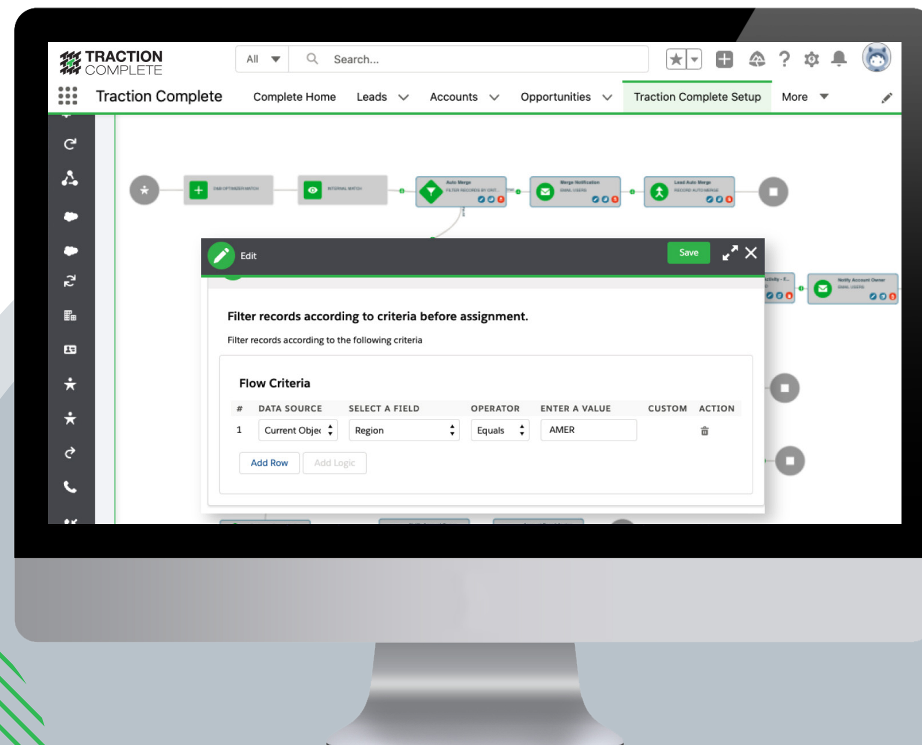
Use territory-based routing to assign leads based on geography, vertical, or rep specialty. It sounds straightforward, but mapping your territory rules can get complicated quickly with many Operations teams juggling hundreds and thousands of rules.

The key to hitting your speed metrics with mile-long territory rules is to automate, automate, automate.

Automate every last aspect of your territory assignment; lead assignment, task creation, record updates, auto-conversion, account assignment, opportunity creation… we could go on but you get the point.

And remember the Asana story? Make sure your routing solution has a strong visual UI to support speedy changes and updates on the fly.

If you are selling into **large company hierarchies,** it's critical that your routing tool can handle parent or global headquarter routing.



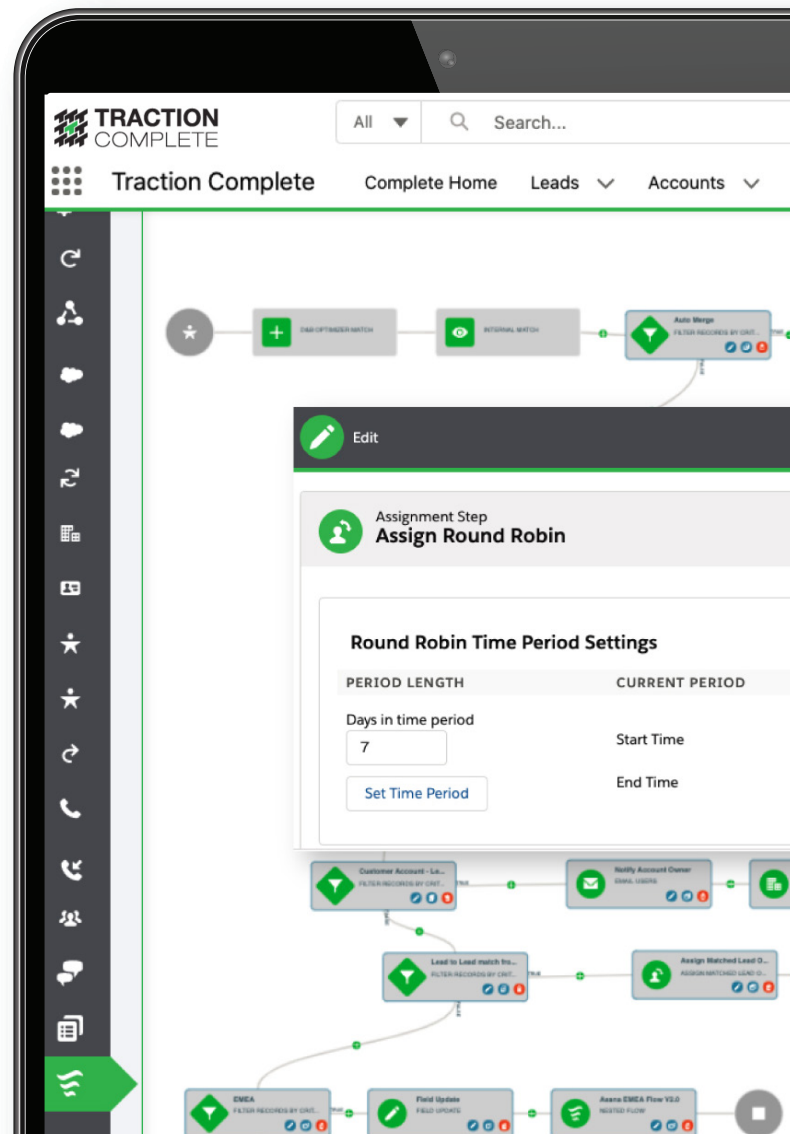
3. Weighted Round Robin Routing

Round robin done right allows you to cut back on assignment rules and distribute leads evenly between reps and territories.

Here are three key considerations when working with round-robin assignment:

- Rep availability: whether it's working hours, personal availability or being actively logged into the system, you want to make sure leads are being routed to a rep that is actually available to respond
- Weighting and capping: incentivize good performance by topping up your best performing reps first.
- Use dynamic groups: by matching directly to your user groups, dramatically cut back on the number of territory rules you need to manage

By assigning each new lead to a different owner evenly, you'll avoid the pitfalls of Salesforce queues, give each rep an equal opportunity, and cut back on the number of assignment rules you need to manage. It's a win, win, win.



4. Speed-Based Re-Routing

Even your best reps may have to step away from their computer or have meetings throughout the day. Make sure you re-route leads to an available salesperson if reps haven't followed up fast enough. This is the best way to make sure your teams are honouring your SLA’s and hitting your response metrics.

5. Lead-To-Lead Assignment

Account-based assignment and round-robin pools are a must, but lead-to-lead assignment rounds out your speed to lead strategy by making sure prospects and reps are getting the best experience possible.

Like an account-based assignment, the foundation here is a strong match. Matching leads to other leads that are from the same company when no account exists is the first step. Once a match is made, you can assign the new lead to the owner of the original lead.

6 RESPOND

QUALITY OUTREACH

THE GOAL?

Respond to your customer (within 5 minutes, of course).

But the goal is not just to respond as quickly as possible. To tune up your lead to opp conversion rate you need to make an engaging, personalized, valuable connection with your prospect. You need to respond right.

There are a number of factors that play into this, many of which are soft skills on the part of the sales rep. But these skills can only be put to use if your reps have the right information at hand (you can hardly personalize your outreach if you don't know anything about the company you're working with).

In order to provide a quality interaction, sales reps need to know:

- History with the person or account
- Previous sales to the company or to a subsidiary
- Whether they've been involved in an outbound campaign
- If they've attended a recent company event
- Crucial firmographic information such as company locations and addresses, industries, segments, and structure

Lead-to-account matching is the foundation for quality interaction.

With accurately matched and thoroughly enriched lead data, reps gain instant insight into existing company relationships. As a result, reps no longer are 'googling' around, response times are not just faster, but of better service and quality.

Automate your follow-ups with Outreach or SalesLoft.

In case the lead doesn't convert after the first response, you want to ensure that you kick off your Outreach sequence or cadence for automated follow-ups. Outreach or SalesLoft allows you to set automation rules to ensure your reps follow up with the appropriate defined sales process.

We're firm believers that responding right is just as important as responding first. With a speedy high calibre response, your revenue teams will be unstoppable.

But your work isn't over. Like every successful Formula One team, you need to keep optimizing your car design to ensure you not only win the race but become world champions.

7 OPTIMIZE

REPORT, MODIFY, REPEAT.

Achieving a lead response time under 5 minutes is not a one-and-done kind of affair.

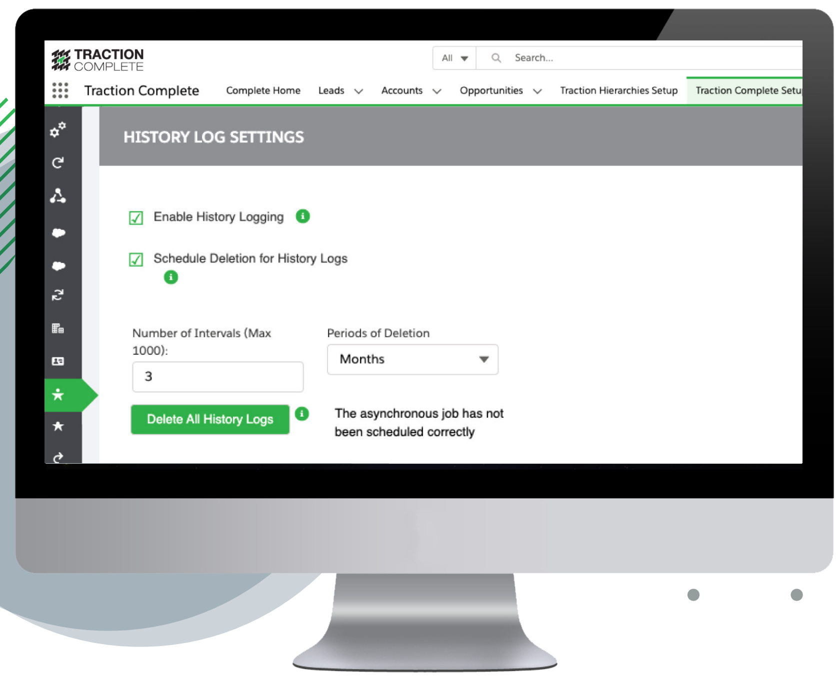
Rather, it requires consistent measurement and analysis, and the implementation of additional strategies to continuously improve lead response times and customer experiences.

The good news is that you're already halfway there.

Because you've already set up the Response Timer and Dashboard, you have access to detailed insights into individual rep performance and lead response metrics.

Here's what you should be tracking:

- Average first response time by rep
- Average rep response by team
- Response time trends over time
- Sales qualified lead to opportunity conversion rate
- Performance against SLA's



Take it a step further by monitoring and auditing matching and assignment flows with an in-depth history log at every step of the lead journey. This makes it easy to catch and correct any miss-set rules that are creating a bottleneck.

Fine Tune Your Rep Responses

Once you have your lead matching and routing flowing like a well-oiled machine and your reps are hitting their response metrics, take a look at the responses themselves to identify the actions of your best reps and encourage those activities team-wide.

That means reviewing successful cadences in Outreach of Salesloft to understand how reps are utilizing the enriched data they're now provided with and providing regular rep coaching that is specific to meeting your Speed to Lead goals.

Again, you should seek to automate your optimization process as much as possible to make continual improvement seamless.

The key to your continued lead response success is to:

Always. Be. Optimizing.

THE FINAL WORD

Join the Speed to Lead Revolution

You're inundated with the notion that – ***speed is everything!*** Speed is crucial, but now you know there's so much more underpinning your speed to lead. With the evolving digital landscape and the complexities of both the buyer journey and your go-to-market strategies, you need to ensure you're fully equipped to move at the speed of your business.

It's time to go beyond the status quo and sharpen your speed to lead building blocks.

With more flexible lead-to-account matching in place, you can level up how you're dealing with leads and how you're engaging your customers. Couple that with sophisticated routing capabilities, enrichment, and trackable ROI and optimization - and you've got the building blocks to speed up.

The top 5 benefits of setting yourself up for speed to lead success:

1. No more manual effort and wasted time triaging leads
2. Flexibility to adapt with the complexity of your evolving GTM
3. Lead neglect and lost revenue becomes a thing of the past
4. Revenue teams are aligned and rep conflict is minimized
5. Customers are happy and your conversion rates are through the roof!

Put the pedal to the metal with automated lead matching & routing.

Use **Complete Leads** as your competitive advantage and get ahead of the pack.

TRACKABLE ROI

The only timer and dashboard of its kind, allowing your teams to speed up and let no lead slip through the cracks.

POWERFUL MATCH ENGINE

Match any object, dedupe, and create custom match criteria so you get the perfect match, every time.

DEEP ENRICHMENT

Enrich leads with industry-leading D&B Integration. Add firmographic data, and avoid territory conflicts and rep overlap issues at the point of entry.

SOPHISTICATED ROUTING

The flexible, powerful routing solution to take you from status quo to mastering enterprise-level complexity.

UNPARALLELED USABILITY

Change at the speed of your business with a visual assignment builder and drag & drop interface.

COMPLETE CLEAN

Keep your data clean in real-time with auto-merge and convert. Tackle large clean-up projects with mass deduplication.

BEST-IN-CLASS DEPLOYMENT

Sandbox testing capabilities so you can personally deploy into production without having to turn to IT.

SAFE & SECURE

100% native to Salesforce, your data never leaves the platform.

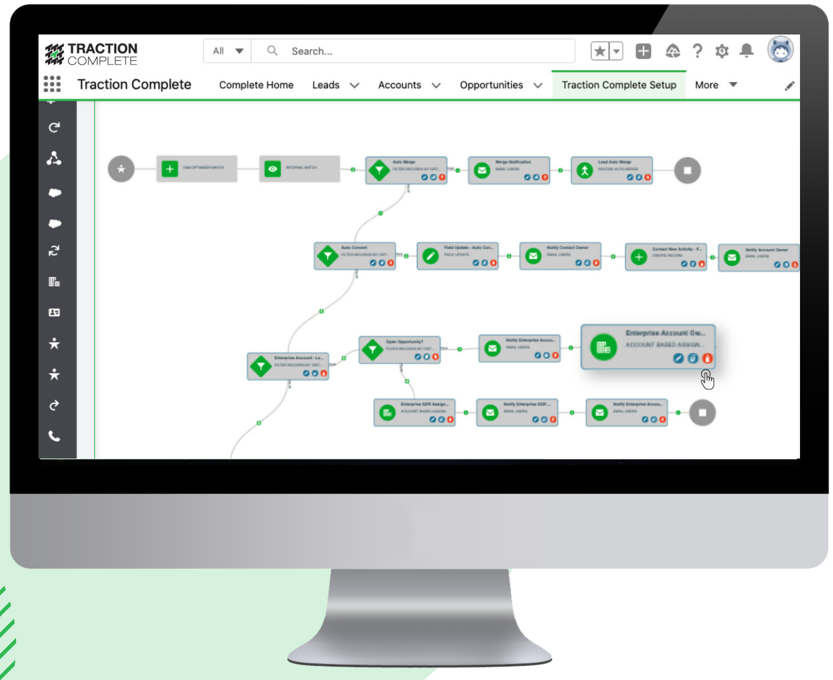
> **Complete Leads is helping us adapt phenomenally. The routing UI is superb. With their copy, drag, and paste flow visualization I'm able to build things out very quickly.**

- Jim Maddison, Principal Business System Analyst

VERACODE

Ready to Run?

Traction Complete Leads is the most powerful automated lead-to-account matching and routing solution on the market. Allowing revenue leaders to build complex, customized lead routing rules, identify bottlenecks and laggards at a glance, and drive revenue growth through improved lead response times.



BOOK A PERSONALIZED DEMO

TRACTION COMPLETE

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in