RINGLEAD

ROUTE

Automate the routing of ANY Salesforce object in your system with RingLead, a fully integrated suite for your data quality processes

THE
CHALLENGE

An unrefined lead routing process creates chaos in your organization: leads are incorrectly assigned, inexperienced reps are given high priority Leads, and your sales follow up is delayed.

The impact on sales productivity and your brand's reputation are tremendous, and no one at your organization can answer your burning question: **"Where are my leads?"**

And, of course, it doesn't stop at Leads.

The efficient routing of any Salesforce object in your system – Opportunities, Contacts, Accounts, Cases, etc. – is critical to your team's ability to engage promptly, effectively, and intelligently, ***in any scenario.***

TRANSFORM YOUR ENTIRE ROUTING PROCESS WITH RINGLEAD.

Strategically process and route every Lead that enters your system, regardless of source, with RingLead Route. Designed to promote absolute flexibility and control, Route leverages configurable workflows, rules and criteria to assign leads with unparalleled speed and precision, giving Salesforce admins complete visibility into Lead flow and activity.

KEY COMPONENTS OF RINGLEAD ROUTE

Four **high-level conditions** are used before any routing occurs to determine the appropriate workflow: new Leads, Leads matched, Contacts matched, and Accounts matched.

Configure the flexible routing of **any Salesforce object** (Accounts, Leads, Contacts, Opportunities and Cases) using simple Salesforce triggers that enable you to route objects regardless of source.

Leverage sophisticated Lead assignment techniques like custom weighting and capping with **weighted-round robin**

Accommodate for reps working different time zones, or set rules for when different reps are on vacation, **using time-based routing**

View your lead history and activity (e.g. no. of Leads linked to Accounts) for any time frame with comprehensive **Activity Reports**

Easily view and configure workflow and rule definitions in a personalized **visual display** equipped with drag-and-drop functionality

Assign Leads based on **segmentation fields** to ensure you adhere to territory assignments

THE SINGLE PLATFORM SOLUTION

Lead routing is far from a solo act. Your assignment rules and workflows must be fueled by the right data in order to avoid painful delays and inaccuracies that result in missed opportunities.

The RingLead Platform integrates all key data quality processes – including routing – into a single command center to ensure your leads are cleansed, normalized, enriched, and segmented, all in the appropriate order of operations. By directly integrating the routing process with other key data operation processes, RingLead ensures all leads are routed more precisely, more timely and more efficiently, than with any other lead routing tool on the market.
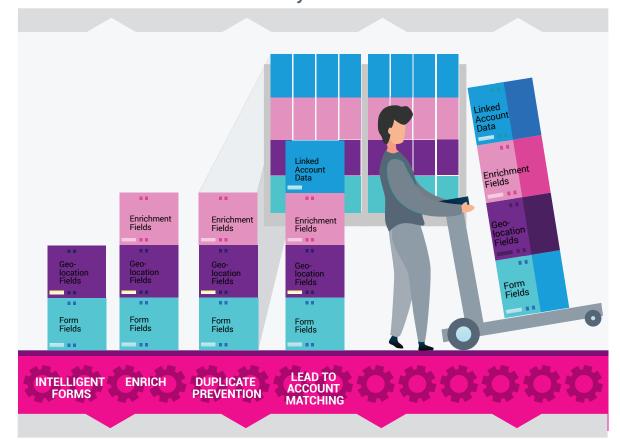
RINGLEAD ROUTE

Round Robin   Easy to Use   Lead to Account

Linked Account Data

Enrichment Fields

Geo-location Fields

Form Fields

Linked Account Data

Enrichment Fields

Geo-location Fields

Form Fields

INTELLIGENT FORMS   ENRICH   DUPLICATE PREVENTION   LEAD TO ACCOUNT MATCHING

ROUTING USE CASES

Painlessly configure round robin groups aligned with your sales strategy to auto-assign Leads to the right owner for relevant, timely engagement. RingLead Rules offers complete, limitless control over how Leads enter your CRM and MAP.

Popular use cases for Routing include:

- Assigning West Coast Leads to the West Coast Round Robin workflow

- Matching a new Lead to an existing, high revenue Account and assigning the Lead to the Account Owner (or the Owner's BDR)

- Changing the Owner of a Lead who submitted a Contact Us form if the Lead is Owned by a Queue

- Creating a new Lead and linking it to the proper Account if the matching Account is an existing Prospect, then changing the Lead priority to high

- Matching a new Lead to a customer Account, then converting the Lead to a Contact and changing the Contact Owner to the Account Owner

- Setting up multiple Round Robin rules that are not dependent on configuring a Salesforce custom formula field every time the number of people required to be in the round robin changes

- Ensuring that new Leads of different quality and/or sources are assigned evenly, and that owners don't get a disproportionate number of quality leads from a particular source, through multiple round robin rules

- Routing Leads to various reps based on skill level and expertise

- Routing based on workload using weighted round robin rules to ensure fair distribution

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