Intelligent Routing Strategy:

The Definitive Guide to Making Account-Based Lead Assignment Your Competitive Advantage

Created Specially for Revenue Operations Leaders

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Congratulations

on taking your next step toward innovating your sales and marketing operations.

This ebook is designed to be your go-to guide on why you should care about routing, what capabilities you need, and how to design and implement an intelligent routing strategy that delivers business impact. We'll begin with a definition of routing.

> Move fast. Speed is one of your main advantages.
>
> -Sam Altman,
> CEO of OpenAI

What is Routing?

Routing is the strategic business process of assigning data to the correct person or group. Virtually all data needs to be matched with something or assigned to someone. A common scenario this ebook will focus on is distributing leads to salespeople and matching leads with accounts. (Note: leads are not the only type of data that benefit from intelligent routing; we've included a couple examples in the "little-known applications section".)

On the surface, the concept of sending leads to salespeople appears simple. But simple is not always easy. Below the surface, there are many variables, constant changes, decisions, and challenges that make it difficult and time-consuming to manage routing processes.

Indeed, ask any marketing or sales operations manager what their biggest challenge is, and more often than not, they'll say getting clean data to the appropriate individual as fast as possible is in their top five.
Speed is the name of the game. A popular study by Dr. James Oldroyd and XANT (formerly InsideSales.com) reported a 21X increase in the likelihood of a lead being qualified if it's responded to within five minutes compared to 30 minutes.
Yet, a survey conducted by Drift revealed only 7% of B2B companies respond within those first minutes.

This presents an opportunity for businesses to make "speed to lead" their competitive advantage. Leveraging sophisticated technology to automate an intelligent routing strategy is the way to seize this opportunity.

Let's dive in.

Table of Content

Chapter **1**

Why intelligent routing matters?

Business leaders must care about how data is routed, because it has a direct impact on business results.

According to LeadConnect, 78% of customers buy from the company that responds to their inquiry first. It makes sense. Let's consider Sarah, who is shopping for a new tractor for her agriculture business. After doing some research, she narrows it down to two machines from competing companies. She contacts them each within a couple minutes to ask a question. One company responds in two hours and the other responds the next day. Sarah doesn't bother answering her phone the next day, because her question was already answered and she started a relationship with the company that responded to her first.
Lead response time is not a gamble most businesses can afford to make. Hot leads can go cold real quick and revenue targets are missed.

But building a company culture where everyone respects the importance of "speed to lead" can feel like an endless struggle without an intelligent routing strategy. Indeed, CRM admins, data professionals, and revenue managers alike will understand the pain and frustration that often create barriers between marketing and sales teams.

Ultimately, organizations without an intelligent routing strategy can experience a downstream impact on P&L: Technology and payroll costs increase while revenue growth stalls. But there are other underlying consequences of not having systems in place for routing data intelligently that can be felt across all functions of the go-to-market engine.

Let's take a closer look at some of those "below the surface" challenges.

Critical business issues and consequences

When leads aren't properly routed, multiple stakeholders are affected:

- The SDR has trouble meeting their qualification goal.
- The CRM manager is bombarded with constant change requests, like fixing lead assignments, resolving duplicates, or correcting data discrepancies.
- Developers have to deal with creating, updating, and maintaining Apex code in Salesforce (a costly endeavor).
- The head of sales is wondering why win rates are low.
- The marketing director is struggling to prove ROI.
- The chief revenue officer is asking the head of sales why quarterly targets aren't being hit. And most important, the customer is left wondering if they'll ever receive a callback.

As market conditions fluctuate and organizations adapt to new working conditions, business logic changes and routing rules must follow suit
And yet, a survey revealed that more than 75% of organizations are still manually distributing leads or relying on their CRM or MAP (marketing automation platform) for routing.

Manual effort wastes time, creates inconsistencies, and can even introduce unintended bias in lead assignment. Salespeople are unhappy and customers are upset because of delayed responses.

Without a sophisticated routing system in place, leads don't get to where they belong on a reliable basis. This is problematic, not only because it severely slows down response times, but also because lead assignment issues are hard to diagnose. Shoddy routing implementations are difficult to manage and time-consuming to update.

What's the cost of high-paid employees spending time on low-value, administrative tasks?

Some organizations can get by with out-of-the-box functionality like Salesforce lead assignment rules, but it can end up being slow, inaccurate, and difficult to scale. Unfortunately, Salesforce does not support round robin assignment out of the box. (More on Salesforce functionality later.)
As go-to-market strategies become more sophisticated and companies concentrate their efforts on high-value accounts, lead-to-account matching (L2A) has become an integral component of the intelligent routing strategy

But without a mechanism for matching leads with accounts, account-based marketing (ABM) programs are unlikely to be effective. Here's why:

> “Without L2A, it's difficult to treat customers and prospects appropriately because necessary data is absent from lead, contact, and account records.

- The hunters (account executives) have a lack of context because they can't see company-level information on lead records, such as geography, industry, and company size. They miss opportunities to capitalize on marketing efforts that generate demand from named accounts. SDRs might be assigned leads from a company that an AE is already working on, which ends in an embarrassing scenario. (“Oh, I didn't know you were already working with John.”)
  - Leads related to prospect accounts need to be matched for effective prospecting, nurturing, and scoring.
- The farmers (account managers) can't easily see all the leads and contacts related to their accounts. Customer activity history is not organized in one spot, and hot leads on hot accounts slip through the cracks when they're not matched properly.
  - Leads related to customer accounts need to be sent to account owners, the customer success team, or converted; otherwise, cross-sell and upsell opportunities remain hidden.
- Organizations without lead-to-account matching suffer from too much friction in their revenue operations, and salespeople squander their time researching customer information instead of selling.

Make no mistake: lead-to-accounting matching is a prerequisite to ABM.
Ultimately, poor routing systems slow down the sales cycle, negatively impact both the employee and customer experience, and deals are lost to competitors.

Benefits

As mentioned earlier in the introduction, it's critically important to respond to leads within the first five minutes. An intelligent routing strategy enables this by increasing the average speed of getting leads from the initial point of engagement to a salesperson. Thus, "speed to lead" is improved and there's a lift in conversion rate.

Revenue operations leaders gain greater control of the revenue engine through smarter lead management. Automated routing processes eliminate manual efforts that suck up time. Fewer leads are lost, and the company culture flourishes around the idea that lead response time is tantamount to success.

There are multitudes of other benefits enjoyed by organizations after implementing an intelligent routing strategy. Let's look at them from the perspectives of database health, account-based marketing, employee experience, and customer experience.

Better database health

- Eliminate duplicates, prevent the creation of new duplicates, and reduce the cost of your MAP database.
- Accurately measure campaign influence, marketing ROI, and conversion rates.
- Enriched data provides business intelligence on customers and prospects, such as annual revenue and company size. Normalized data creates consistency by standardizing fields like job titles and addresses. Together, enriched and normalized data allow for improved segmentation.
- Correct lead assignment and account ownership saves time.
- A clean database is an efficient workspace for everyone.
- Add fuel to the revenue engine with enriched, normalized, and segmented data.

Streamlined ABM efforts

- Intelligent routing with lead-to-account matching makes account-based marketing possible.
- Give everyone on the account team a complete 360-degree view of activities within an account by making sure all data gets to where it should be.
- Marketing campaigns are more effective because they're targeted at the right buyer persona at the right stage in their journeys.
- Account owners can quickly see new leads generated from targeted ABM campaigns, right from the account record, effectively surfacing new cross-sell and upsell opportunities.
- SDRs benefit from seeing company data—industry, company size, location, account score, and more—directly on lead records, at a glance.
- Sales and marketing teams collaborate better and enjoy the success of their concerted ABM execution with measurable results.

Improved employee experience

- Bridge the sales and marketing divide with higher-quality leads that don't slip through the cracks.
- Facilitate fair lead distribution among the sales team so everyone is happy.
- Cure the headaches caused by duplicate data, missing data, and mismatched data.
- Quickly get the right lead to the right rep, so they have a better shot at making contact with the prospect.
- Salespeople have more time in their day to focus on making quota, because they don't have to deal with manual lead triage or hunt for information.
- Enhance the CRM user experience to increase adoption, collaboration, and productivity.

Delightful customer experience

- Impress your prospects by responding to them faster and knowing more about their business.
- With all the data you need to create personalized experiences, you'll be able to build positive relationships in less time.
- Create a frictionless buying experience; create a happy customer.

Chapter 2

Specific capabilities you might need (including examples)

Customer expectations continue to evolve. Sales and marketing organizations continue to seek new ways to meet those expectations. The goal is to provide a good customer experience while at the same time retiring quota and hitting revenue targets. Increasingly sophisticated go-to-market strategies, including adoption of account-based marketing, necessitate the need for robust data management technologies.

Growing companies require systems capable of scaling.

Whether you want to ensure all leads from the same company are always owned by the same person, or if you want an automated, hands-off way of evenly distributing leads across the board, below are specific capabilities you'll want to employ in your intelligent routing strategy.

Capabilities

Time-Based Routing

Employee schedules can change. As people take paid time off, you need to make sure they don't get assigned leads, because if they do, your lead response time will be way beyond 5 mins—perhaps even beyond 5 days.

You might also want to accommodate different employee working hours, especially for sales reps working in different time zones.

Account-Based Routing

Matching leads to accounts is one of the most common components of an intelligent routing strategy and enables account-based marketing.

Round-Robin

Create pools of users to assign leads on a rotating basis. This ensures salespeople all get a fair amount of "at bats" and the workload is evenly distributed. Round-robin functionality is a core component of an intelligent routing strategy.

Custom Weighting

Further customize your round-robin lead assignment by giving each user a weighting so they're assigned fewer or more leads from a queue, without having to manually intervene and disrupt the round-robin flow.

Capping

You might need to limit the number of leads able to be assigned to people. For example, to prevent a salesperson from having too many open leads, stop assigning them new prospects if they're already working at full capacity.

Weighted Round-Robin with Caps

Quickly and easily combine the power of round-robin, custom weighting, and capping. When you hire a new salesperson, you might want to give them fewer leads until their 90th day after they complete their training. Or you might have a seasoned rep who you want to ensure gets more leads.

Duplicate Prevention

Duplicate records wreak havoc on databases, cause confusion, skew KPIs, and negatively impact the revenue engine. In your routing processes, you'll want to prevent duplicates from being created, which might entail merging leads or converting them to existing contacts.

Data Standardization

Data enters the system in different shapes and sizes. An intelligent routing solution can automatically A) normalize the data into standard formats (i.e. CA is always transformed into California) and B) segment the data into standard cohorts. Standardization enables fast and accurate routing, and equips marketing teams with crystal-clear campaign targets, and sales teams can have simplified territories or quickly build call lists in Salesforce.

Marketing Automation Integration

If you have a marketing automation platform (MAP), you'll want to connect your routing processes with whatever platform you use, such as Marketo, Pardot, or Eloqua. Your entire marketing technology stack should be connected to facilitate a seamless flow of information throughout your revenue engine.

Integrated Enrichment

A robust solution will streamline your routing process and increase match rates by populating virtually any data point, in real time, from any number of the industry-leading data vendors. Within the same flow, an intelligent routing solution can standardize the enriched data into usable segments according to unique business requirements.

Automatic Field Updates

When processing leads or other objects, you might want to have a field value updated—any field, whether it's the record being processed or the matching record. For example, if you have an open opportunity, and the CTO from the same company watches a recorded demo of your product, you can have them added as a contact role to the opportunity as an influencer or decision-maker automatically.

Tasks & Alerts

If a prospect requests a product demo or consultation, you can have a task assigned to either a salesperson or a product specialist to conduct the demo. This is one way to hold people accountable to following through on action items. Email notifications can optionally be delivered so action items are added to the inbox.

Activity Reports

Comprehensive activity reports make it possible to view lead history and activity, such as the number of leads linked to an account for any time frame. Audits are helpful to answer questions like, "Why was the lead routed this way?" You'll find it useful to have logs with visibility into matching results, record assignments, and any fields that were updated—all in one easy-to-view report.

User Interface

A good user experience removes friction from managing routing workflows, allocating user licenses, and making quick updates. Usability correlates with adoption. A visual display with drag-and-drop functionality makes it a delight to execute your intelligent routing strategy.

Cross-Object Routing

Matching leads and contacts with other objects, such as accounts, opportunities, and cases can be useful as part of an intelligent routing strategy. For example, matching leads with accounts is necessary to optimize account-based marketing and sales processes. If a lead enters the system with an email domain that matches an account's website domain, you can have the account data copied to the lead record for increased visibility.

Batch Updates

Occasionally you might find a need to perform recurrent updates to maintain the health and integrity of your database. For example, a batch process can be useful for conducting territory reassignments on records owned by inactive users.

Re-Routing

Are there scenarios where you would want to re-route leads, such as a missed SLA? You might want to automatically reroute a lead if an SDR does not take action such as changing the lead status within a certain time period of a lead being created. Yes, you can foster a culture where everyone respects lead response time by instituting a policy where the consequence is a hot lead being taken away.

Owner Assignment & Backup Owner

Organizations may have unique needs that require flexibility in who or what gets assigned the record. Here are some examples of ways you might want to assign leads or contacts: a round robin group, a specific Salesforce user, an account team member, a column from a CSV file, a hidden field on a web form, or even use a Salesforce assignment rule.

As an extra layer of protection, a backup owner can ensure no lead goes unanswered.

Now let's look at some scenarios.

Example use case scenarios

The possibilities of your routing solution should be limited only by your imagination. With a sophisticated tool, fine-tuned routing workflows can be set up for virtually any scenario.

Sales territories are usually based on geography or market segment (i.e. Enterprise, Midmarket, SMB), but here are some more data points organizations might want to include in their routing processes:

annual revenue • number of employees • geography • industry • NAICS and SIC codes • department budgets • product expertise • job titles • technologies used • capital raised

Territories, assignment groups, and routing rules can be comprised of any combination of data.

Other examples of niche routing rules:

- Number of brick-and-mortar retail locations.
- Size of an organization's sales force or customer support call center.
- Amount of franchisees nationwide.
- Number of trucks used in supply chain delivery.
- Startups that recently received a certain amount of funding.
- Private, public, or nonprofit organization.
- How many hardware devices active in field service.

Let's continue with some more examples to paint a picture of the limitless control that comes with a sophisticated routing solution. Ready, set, go!

Rapid-fire examples to spark your imagination

Build deeper customer relationships by ensuring prospects from the same company are always owned by the same salesperson or team.

Merge duplicates to avoid the embarrassing mistake of different salespeople unknowingly contacting the same person.

When a lead comes in that matches a prospect account, assign it to the sales owner of that account.
Similarly, when a lead comes in that matches a customer account, immediately convert it to a contact and assign it to a customer success manager.
If an employee is traveling, temporarily skip over them so they don't get assigned any leads while they're not available to respond quickly.
Send a notification to an executive when a lead has a certain kind of job title or role. If the CEO of a target account makes an inquiry, you can have your own CEO connect with them on LinkedIn.

Assign or reassign a contact to a product specialist based on the customer's interest, and create a task to schedule a demo.
If you have sales teams that specialize in verticals, ensure that prospects get to the salespeople that understand their pains best. Some industries have particular buying processes, and understanding the buyer's process can increase win rates.
Assign new leads to SDRs or BDRs for prospecting, and assign new customers to the appropriate customer success group or account management team for cross-selling and upselling.

If your product or service complements a product from another vendor, you might want to route based on what technology you know the prospect company uses. Or perhaps as part of your competitive strategy you might want to route certain prospects using competitor technology to a particular sales group.

Little-known applications of a routing solution:

You might have multiple ingestion points where leads can enter your system of record, such as multiple CRMs or MAPs for different business units. You routing technology should be able to support a seamless integration of data.

Apply different rules depending on where the lead originated from, such as whether it was created manually, captured from your website, or imported from a list. You can keep some leads in your MAP and out of your CRM until they're sales-ready.

Most companies maintain one overarching route workflow, similar to how you might have one active lead assignment rule in Salesforce. However, you might have a special circumstance where you want additional route workflows that act as containers of rules used for special circumstances. For example, if your field marketing team has a list from a [virtual] tradeshow, you might have a reason to temporarily deactivate your primary route workflow and temporarily activate another one.
Drive action and ensure persistent follow-ups. Set up a rule, based on any of the previously-mentioned data points or scenarios, to create a chain reaction and invoke a series of tasks: Phone call, email, LinkedIn outreach, repeat. Initiate a nurture campaign to warm up the lead.

Set up a free-for-all system where certain kinds of leads are assigned to a particular queue and salespeople can cherry pick leads from the queue. First come, first serve. To prevent lead hoarding, set up re-routing rules if certain conditions aren't met, such as if a lead status isn't updated in a certain amount of time.

Automatically clean, validate, enrich, normalize, and segment your data in real time or retroactively to maintain the quality of your database and improve the precision of your routing process. (More on this later.)

Chapter 3

Recommendations for planning your business initiative

Planning is essential to success. To guide you on your journey to increasing speed to lead, here are six steps you can follow:

Six Step Process

1 Start with the end in mind. (Why)

a. "Start with the end in mind." —Stephen Covey, 7 Habits of Highly Effective People
b. Who are the key stakeholders? (See step 2.)
c. How will you determine whether your routing strategy is successful? Put another way, what are your success criteria?
d. Identify your key performance indicators (KPIs) and remember to build a dashboard to report on them.
e. What's your decision-making process for picking a routing solution? (See the next section for three key considerations.)

2 Identify your stakeholders. (Who)

a. A good project manager knows who's involved with every aspect of a mission-critical endeavor before the project starts.
b. An executive sponsor can help champion the project.
c. Who should help define and approve the routing requirements? Consider whether a RACI matrix might be useful.
d. Who is Responsible for the implementation? Who is ultimately Accountable? Who should be Consulted, such as a subject matter expert? And who are the people that need to be Informed (one-way communication), and at what frequency?
e. Who's responsible for managing the data that empowers your routing? A committee or center of excellence for data quality might be beneficial for your organization.

3 Document your routing scenarios. (What)

a. Share your plan with end-users. Transparency and communication are good ways to get buy-in and support.
b. In plain language, write down your routing scenarios, perhaps in a Google doc, and make it visible to your stakeholders and end-users.
c. Define a service level agreement (SLA) if you don't already have one. This will set expectations on how quickly a salesperson must respond to a new lead before it gets taken away or escalated.

4 Define the timeline. (When)

a. If you fail to plan, you have planned to fail. Everyone is busy.
b. With any new technology, there is a learning curve. No matter how simple or intuitive the software is, there is still some level of training required, even if it's just watching a couple video tutorials or reading product documentation.
c. Take the time to familiarize yourself, and you'll be able to execute faster.
d. A documented timeline removes uncertainty and will further inspire your employees and get their support.

5 Create a policy for users to request updates. (Where)

a. Create a mechanism for people to request and suggest changes. Your users will be the first to identify any necessary updates to your routing processes. Help them help you.

6 Plan for next steps.

a. Once your intelligent routing strategy is in place, you'll want to keep it running and innovating it.

Use cases with other CRM objects:

- Six months after a deal is lost, transfer the opportunity's key contact or the opportunity itself to a BDR for follow-up. Don't give up. Persistence pays.
- Decrease the number of manual steps in your renewal process by scheduling renewal opportunities to be automatically created 45 days before the contract end date. Assign it to customer success, renewal management, or the owner of the account. Get a jump start on potential cross-sells. Reduce churn.
- When an opportunity reaches a certain stage, have it automatically re-assigned from a junior sales rep to a senior account executive to seal the deal.
- Automatically create a new opportunity when a set of qualification criter~~ia on a lead or c~~ontact record are met. Control your conversion process while saving time for your reps.
- Annually transfer customer accounts to new account managers for the purpose of growing and expanding the account from a fresh, new perspective
- Change the type field on the account object from Prospect to Customer when an opportunity is closed won. A year later, transfer the account from the account executive to an account manager to switch from hunting mode to farming.
- Mark a prospect account as "Marketing Qualified" when related leads meet your marketing criteria, such as exceeding the firmographic or behavioral lead score thresholds or upon confirmation of viewing a product demo. Then assign the account to an account executive.
- Change case owner when any data value changes, or escalate a support case when a certain amount of time passes.

Keep your revenue engine running like a well-oiled machine and automatically get the right leads to the right people, quickly.

Now that you're well on your way to crafting an intelligent routing strategy, let's think about some of the nuances when it comes to selecting the right technology.

Chapter 4

Key considerations when picking a routing solution

No doubt, there are a variety of solutions available in a growing, competitive landscape as more organizations realize the need for robust data orchestration. This can complicate the buying process and make it important to carefully review your options as you consider today's needs as well as looking forward to tomorrow's.

Below are some ideas and questions to guide your decision-making process

Build or Buy?

When buying a car, would you want the first one off the lot? Technology vendors perform extensive work testing for quality, making improvements, and innovating in the contexts of diverse industries and scenarios. You can reap the benefits of thousands of development hours already put into a product.

What's the cost of waiting? Software has predictable costs and results and can often be deployed in hours, while custom development requires conceivably more time to plan, design, and test and can snowball into unforeseen work. Consider the total cost of ownership.

Do you have resources available to perform maintenance? CRMs like Salesforce periodically release updates that may affect custom development. SaaS providers typically have a process for ensuring in advance that their solutions seamlessly work with any changes made to the CRM.

What about native CRM functionality and Salesforce?

If your assignment rules are basic, then using out-of-the-box lead assignment functionality is fine, but that's hardly ever the case with growing organizations.

Using Salesforce workflow rules is restrictive because of limited cross-object referencing. With process builder, it's more flexible, but it can get convoluted and complex. Apex code is powerful, but it's also expensive to maintain.

Salesforce will be the first to say they don't try to solve for everything. This is why the AppExchange exists. As they remain true to core functionality, their investment in native routing capabilities is limited.

> "A tool with good user experience that's robust, while also making your CFO feel comfortable about it, is a win-win."
>
> -Cody Bustamante, Salesforce Admin & Marketing Ops Manager

Point solutions or an all-in-one platform?

An end-to-end routing process generally looks like this: First, an incoming lead is validated and duplicates are prevented. Next, important data points are populated and standardized. Finally, the data is segmented, matched, and the record is assigned to someone.
All of these steps are necessary to optimize the routing process. Accordingly, there are multiple point solutions available on the market that separately solve for one step of the routing process.

When multiple technologies are purchased from multiple vendors, IT spend is spread out and software costs add up. Overhead is incurred as administrators spend time managing the integration of multiple systems with different user interfaces. Unnecessary amounts of API calls are consumed when, for example, a lead enters the MAP, gets enriched by one or more data vendors, and is sent to the CRM. Wait steps are typically configured to allow time for the data to process without encountering errors like record locks.

With multiple point solutions and data enrichment steps involved in the routing process, it can take 5-10 minutes just for a lead to be assigned to a salesperson. This means there's no chance for the salesperson to respond within that magic five-minute window. When speed is the name of the game, routing latency is costly.

An all-in-one platform capable of performing all the necessary steps in an end-to-end routing process can drastically decrease total cost, reduce overhead, and improve lead response time. Consolidating software saves time and money. Consolidating technologies eliminates inefficiencies. For these reasons, the synergy of a robust platform is fundamental to an intelligent routing strategy.

Routing latency is a common pain point for CRM managers.

Other questions to ask

- What level of support is provided?
- Is training provided?
- Will you be assigned a dedicated specialist to help accelerate your time-to-value?
- How can you make sure the solution scales with you as you grow? Do you have the data you need to support the process you want?

Keep your data clean and actionable, no matter how it enters your database: form fillout, Marketo web hook, list import, or even after it has already entered the system.

Chapter 5

Future-proofing your intelligent routing strategy

Organizations seeking to innovate their go-to-market processes should consider not only the initial need for a routing solution, but also future operational improvements across the entire revenue machine. Intelligent routing is one component of a larger data orchestration strategy.

To effectively execute account-based marketing, you need quality data to inform your routing processes. Just a few examples include company size, annual revenue, territory, and industry. The question is, how will you get this information? Manual research is time-consuming and tedious. And you don't want to add more fields than necessary to your web forms because you risk decreasing conversion rates.

As prospects enter your CRM or MAP, the data needs to be cleansed, enriched, and normalized—and then routed. Routing processes must be data-driven. The chain is only as strong as its weakest link.

Let's review three links in the chain

1. Enrich

When a lead enters the system, whether it's from a form fillout or an imported list from an event, the record needs to be populated with pertinent data so your routing system knows exactly what to do with it. (Remember, you want to keep the number of fields on your forms to a minimum to increase conversion rate.)

Your routing system should be able to enrich data in real time as leads enter the system or when field values change. For leads, contacts, and accounts already in the system, automated bulk enrichment ensures they're always up to date with fresh and accurate data. No more calling into a contact only to find out they switched jobs six months ago.

There are numerous data vendors available on the market. But no single vendor has 100% coverage of every professional in every industry. This is why organizations need multiple data sources to ensure all their data enrichment needs are met. In the US alone, marketers spend over $20 billion annually on data enrichment services, and this is expected to increase as go-to-market strategies continue to become more sophisticated.

Organizations using multiple data sources tend to custom-develop connectors for their CRM and MAP, and build in wait steps to avoid errors caused by multiple data vendors trying to update the same record at the same time. This creates inefficiencies in the routing process: Not only are overhead maintenance costs incurred, but it also consumes the finite amount of available API calls which impacts Salesforce and Marketo API usage, for example. This is a common cause of the traditional routing latency problem.

An robust routing system is one that efficiently supports multiple data vendors and streamlines the enrichment process by:

- Saving API calls.
- Eliminating the need for wait steps.
- Automatically mapping data dictionaries.
- Unifying the normalization process.

RingLead's Data Exchange enables organizations to integrate multiple data providers in minutes. No code required

2. Normalize

Data vendors have unique methods of formatting and categorizing information. This means data in your system may be unstructured or take different forms. For example, there are many ways to categorize and format industries, job roles, addresses, etc:

- CPG | Consumer Packaged Goods | Consumer Packaged Goods (CPG)
- SVP | Senior Vice President | Sr VP
- California | CA | Cali

When you think about all the different ways data enters your CRM or MAP, the problem is clear.
To illustrate, one prospect might fill out a web form and supply Texas as their state, while another prospect might register for an event and input TX.

What if someone inputs a name in all caps, like "ANTHONY PICA"? When you send them an automated email, it'll start with "Hi ANTHONY," which looks unprofessional.

Data inconsistencies create barriers to intelligent routing and may even tarnish your brand reputation.

The solution? Normalization. Essentially, special algorithms transform data to be standardized and consistent, which affords CRM managers greater control of business processes and segmentation.

3. Segment

Marketing 101: know your audience.

Segmentation is the process of placing your prospects and customers into buckets within the database to get a better grasp of your audience. You might segment by geography, company size, lead score, or job function, for example.

Without reliable segments, marketing doesn't have the ability to target their messaging to the right buyer at the right time in the buyer journey. To be clear, managing segments without enriched and normalized data is a painful endeavor.

Proper segmentation empowers lead assignment and account-based marketing.

For example, when you have clearly defined sales territories—based on geography, company size, industry, etc.—it's drastically easier to configure routing rules. Sophisticated organizations will have multiple segments that can be cross referenced for increased routing precision.

Speed to lead is achieved with quality data that's segmented properly.

Synergy is the key

Henry Ford revolutionized the manufacturing industry in the early 1900s. A half century later, Taiichi Ohno developed the Toyota Production System. Both of these business leaders innovated their systems to eliminate waste and increase throughput. In the 21st century, factories are filled with intelligent machines that communicate with each other to automate and streamline the flow of parts. The fourth industrial revolution is here.

How can today's revenue operations leaders leverage the same concepts that enabled Ford and Ohno to make speed a competitive advantage? Eliminate bottlenecks in the routing process.

Traditional routing processes typically consist of fragmented systems, including MAP, CRM, and usually eight web service calls to third parties. It's expensive, painful to manage, and hinders all efforts to improve "speed to lead".

But when software components are purposely designed to work together, a synergistic effect emerges. The flow of data accelerates and throughput increases. When you combine processes for deduplication, enrichment, normalization, segmentation, and lead-to-account matching within one flow, you have a strong chain of business processes that together make your revenue engine more powerful.

Synergy enables you to minimize the fields displayed on forms and improve conversion rate, while still getting all the data points you need to quickly assign the lead to the correct person or group.

An all-in-one-platform enriches all the data you need in one single flow with just one web service callout

Data enrichment improves duplicate prevention, makes segmentation possible, and enables lead-to-account matching.

Normalization is necessary because data lives in different formats. Normalization and enrichment, together, improve segmentation.

Segmentation makes the routing process more effective possible.

An all-in-one-platform enriches all the data you need in one single flow with just one web service callout

An all-in-one solution consolidates business processes and delivers benefits that make executives happy:

- **One investment and procurement process.**
- **One contract and legal review.**
- **One software and security review.**
- **One user interface to learn.**
- **One support team to work with.**
- **One help center to navigate.**
- **One set of internal documentation to manage.**

– Decreased cost.
– Minimized overhead.
– Fewer API callouts.
– Less bandwidth required.
– Eliminated bottlenecks.
– No technical debt.
– Reduced effort.

Made possible because of...

One synergistic data orchestration platform.

In the fourth industrial revolution, revenue operations leaders that adopt sophisticated technology to automate and streamline the flow of data will be able to make account-based lead assignment a competitive advantage for their organization. Conversely, organizations without a synergistic routing system will suffer from the same kinds of latencies that haunted Ford's predecessors.

Fortunately, an all-in-one data orchestration platform gives you everything you need to execute an intelligent routing strategy that withstands the test of time.

About Author

Anthony Pica

Anthony Pica is a marketing leader, Salesforce trailblazer, and writer.

As the head of marketing at Salesforce consulting partner Internet Creations, Anthony designs marketing strategies to grow the business with his team. He helped the company land on the Inc. 5000 list of fastest-growing private companies in America.

His marketing journey began in 1998, a time when he would play JezzBall while taking a break from designing and hand-coding websites for online gaming organizations. In 2005, he founded his first business, a full-service marketing agency.

Ever since he was a kid, Anthony has had a technical mind by nature because of his insatiable curiosity of how things work. He's passionate about digital technology. Today, he holds nine Salesforce certifications and believes in the power of the CRM platform and its AppExchange ecosystem to create better experiences for people. He is the founder of the New Jersey Salesforce Trailblazer Community Group.

As his mentor Marcus Aurelius said nearly 2000 years ago, the happiness of your life depends upon the quality of your thoughts. Anthony believes writing is the best way to clarify our thinking and improve the quality of our thoughts. This is why he loves to write—whether it's sharing ideas in his "work smart, lead better" newsletter or helping organizations grow and educate their customers with thought leadership content.

In his free time, Anthony enjoys reading, photography, playing music, and learning new things. He lives in New Jersey right outside of Princeton with his wife, son, and two dogs. Sometimes you can catch Anthony at the water cooler cheering on SpaceX and Tesla as they usher in a new era for humanity.

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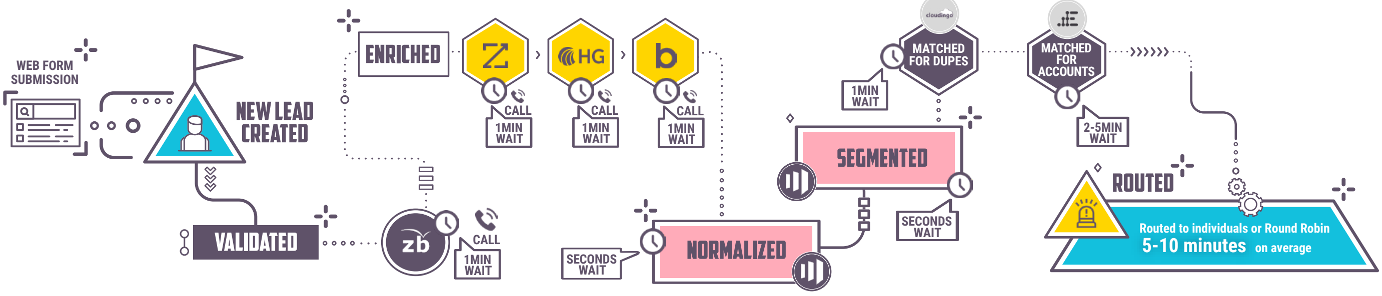
About RingLead

Organizations striving for revenue growth must take lead routing seriously. RingLead helps build company cultures where lead response time is respected and data professionals become data heroes.

The RingLead Data Orchestration Platform combines all data management processes into a single command center to ensure data is routed as fast and accurately as possible.



> “If you need a machine and don’t buy it, then you will ultimately find that you have paid for it and don’t have it.
>
> -Henry Ford

Ready to take your next step to becoming a Data Hero?

RingLead

RingLead’s mission is to help organizations realize the full potential of their sales and marketing data to impact and optimize customer experiences.

Visit RingLead.com/route
Call +1 (888) 240-8088 or +1 262-264-7646
Email sales@ringlead.com

(See how long it takes for the right person to contact you.)