

RingLead Route Adds Instant Book

Intelligent Routing adds Automated Booking App for Inbound Lead Conversion

Convert inbound leads into qualified meetings by enabling prospects and customers to instantly book a meeting after submitting a form on your website.

RingLead Route allows operations professionals to customize Intelligent Routing Workflows for any channel to qualify and distribute leads to the right Sales Rep and/or Round Robin workflow.

By adding on Instant Book, prospects can instantly book a meeting on the correct Sales Rep's calendar immediately after filling out a demo request form.

Automate Meeting Booking of Inbound Leads to Increase Lead to Meeting Percentage and to Double Your Inbound Pipeline.

Without Meeting Lifecycle Automation, On average only 40% of Meeting Request turn into completed meetings. That means 60% of inbound meeting requests are lost.

Before Enabling Instant Book

When an SDR reaches out to schedule a meeting, the process is similar to cold outreach. If and when the customer responds, a back-and-forth is required to get a meeting in the calendar.

As a Result

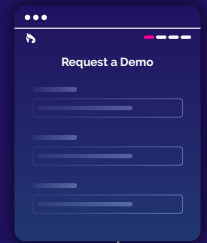
- ☒ Less than half of Inbound Demo Request turn into Booked Meetings
- ☒ Inbound Conversion rates are low
- ☒ Inbound Deals and Conversion rates are low
- ☒ Bad Customer Experience
- ☒ Wasted Time of Sales Reps & CSMs
- ☒ No inbound routing or conflicting routing logic from inbound form processing

After Enabling Instant Book

Leads submit a demo request form and immediately select the best date and time to book a meeting in accordance to the correctly assigned sales reps calendar.

As a Result

- ☒ All Demo Request are converted into Meetings
- ☒ Increased Inbound Pipeline and higher conversion
- ☒ Customer Driven Experience
- ☒ Streamlines outreach process gives Sales Reps & CSMs more time to focus on meaningful work.
- ☒ One Routing Engine for all channels



Verify



Enrich



Normalize



Dedupe



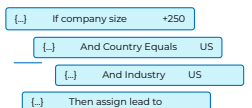
Match To Account



Segment



Route



What date works best for you?

MON TUE WED THU

What time works best for you?

7:00 - 8:00 8:00 - 9:00 9:00 - 10:00 10:00 - 11:00 11:00 - 12:00 12:00 - 13:00

BOOK A DEMO

How does it work?

By using the RingLead Data Orchestration Platform & Intelligent Routing Engine, RingLead users are able to easily design data processing and complex territory & account-based round-robin assignment rules. These routing scenarios could already be triggered by activities like field updates and list uploads. With Instant Book, the same routing scenarios can be used when a prospect or customer fills out a form, to determine which sales reps calendar is shown after the form is submitted.

What is the difference between Calendly and RingLead Instant Book?

Calendly provides sales reps with a personal scheduling page coordinate more effectively when they are in an email conversation. This however does not work on inbound forms, because the form does not know of which sales representative it would need to show the scheduling page.

RingLead Instant Book automates inbound lead-to-meeting conversion by integrating your webforms with intelligent routing and showing the scheduling page of the correct sales rep within seconds.

FEATURES OF INSTANT BOOK



Instantly book meetings

Enable prospects and customers to instantly book a meeting after submitting a form on your website. Cut out the time-consuming back-and-forth involved with manually setting up meetings. The rest of your lead processing lifecycle is automated—shouldn't this be too?



Automatic Email Reminders

Notify your customers of an upcoming meeting to minimize the number of no-shows. More attendance means more deals.



Simple re-scheduling

Enable prospects and customers to easily reschedule if conflicts arise. Ease-of-use means prospects will be more inclined to reschedule, as opposed to declining the meeting altogether.



Flexible Calendar integrations

Connect your calendar from Google, Office 365, or MS Exchange 2003 or later.

OTHER FEATURES OF INTELLIGENT ROUTING

Create a System of Fast, Informed, & Data Driven Lead Follow Up with Intelligent Routing

Weighted Round-Robin with Caps

Further customize your round-robin lead assignment by giving each user a weighting so they're assigned fewer or more leads from a queue.

Flexible Round-Robin Assignment

Create multiple round robin pools to support complex routing rules for leads, contacts, accounts, and opportunities.

Advanced Rules Engine

Set up routing rules based on territory, industry, company size, or other custom criteria; or set up customized round-robin routing for even distribution.

Marketing Automation Integration

Connect your whole martech stack and streamline the flow of information in your marketing systems and Salesforce. Setup is easy.

Batch Updates

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

Re-Routing & Backup Ownership

Create custom criteria to re-route leads, for example re-route a lead if a SDR doesn't take action during a certain period of time. Also, add an extra layer of protection, a backup owner can ensure no lead goes unanswered.

MORE THAN JUST ROUTING

Orchestrate Data Quality & Lead Routing in a single flow

RevOps pros know that Lead Routing is often built on a deceptively complex set of processes, oftentimes on multiple third-party point solutions (AKA the back of a house of cards). This causes inaccurate routing and slow lead processing times.

Consolidate multiple lead processing point solutions to create a synchronized End to End Lead Processing Pipeline to Ensure Fast, Accurate, & Reliable Lead Routing. Easy-to-build, visual automated workflows that take care of the whole process, standardizing, enriching, de-duping, scoring, routing and uploading CRM leads on the fly.

- ✓ **Enrich** critical data points on incoming leads such as job title & company size to streamline routing and ensure sales reps have the information they need to quickly follow up. Integrate any 3rd party data vendor
- ✓ **Dedupe** any standard or custom object to prevent duplicates from wreaking havoc among your sales and marketing team
- ✓ **Normalize** data values to a standard taxonomy (i.e. New York = NY) to ensure the format of incoming data complies with your routing and external systems
- ✓ **Score** Use any combination of data points to define scoring models for leads and accounts
- ✓ **Segment** your data into clear buyer personas, sales territories, scores, and more. (Job Role, Industry, Territory, etc) to enable easy territory planning & assignment
- ✓ **Match Leads to Accounts** to make account-based marketing a possibility by showing lead data in the context of prospect accounts



RingLead Named Fall 2020:

- G2 Crowd Leader
- Most Implementable
- Leader Mid-Market
- Highest User Adoption
- High Performer - Enterprise
- Best Usability



I would need 5 different softwares to accomplish what I can in the RingLead platform



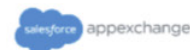
Very sophisticated. I was able to remove over 400,000 duplicates in less than a day.



RingLead Routing improved conversation rates on high priority MQLs by over 50%



RingLead's multi-vendor enrichment tool & segmentation allowed us to identify our Ideal Customer profiles



CUSTOMER TESTIMONIALS

SEE HOW **KASEYA**

Set up routing and lead to account matching workflows to enable a land & expand Go-To-Market strategy



WATCH CASE STUDY



Before RingLead, we **lost revenue** because marketing-generated leads were not followed up on due to incorrect routing.

By setting up RingLead, we've **increased our conversion rates** because leads are now assigned accurately and quickly. Also, our **workflows are now optimized to support our Go-To-Market motions**.



- **Juliet Forte**
VP, Marketing Ops at Kaseya

SEE HOW **INTEGRATE**

Used RingLead to enable Account Based Marketing, Increase Marketable Database size, Maintain GDPR Compliance, and Increase Conversion Rates.



WATCH CASE STUDY



Before RingLead, we used multiple providers to manage duplicates, data quality, segmentation, and lead routing.

Consolidating into a **single platform & flow step** makes our Salesforce & Marketo so much more effective. Of course it reduce costs, but the overall **improvement of data quality & processes has an invaluable impact on our organization and marketing to sales handoff**.



- **Ashley Langford**
Sr. MArketing Ops Manager at Integrate

SEE HOW **EXTERRO**

Accerated acquisitions & expanded into new markets by setting up segmentations, account matching, and multiple routing workflows.



WATCH CASE STUDY

RingLead is the only solution that allowed us to cancel all of our Process Builders and manage our data ingestion process with a single trigger - from segmentation to routing, and so on.

This allows us to **support multiple go to market motions**, as we can easily manage multiple complex routing strategies for different markets and products without a lag on our system.



- **Cody Bustamante**
Salesforce & Marketing Ops Manager at Exterro