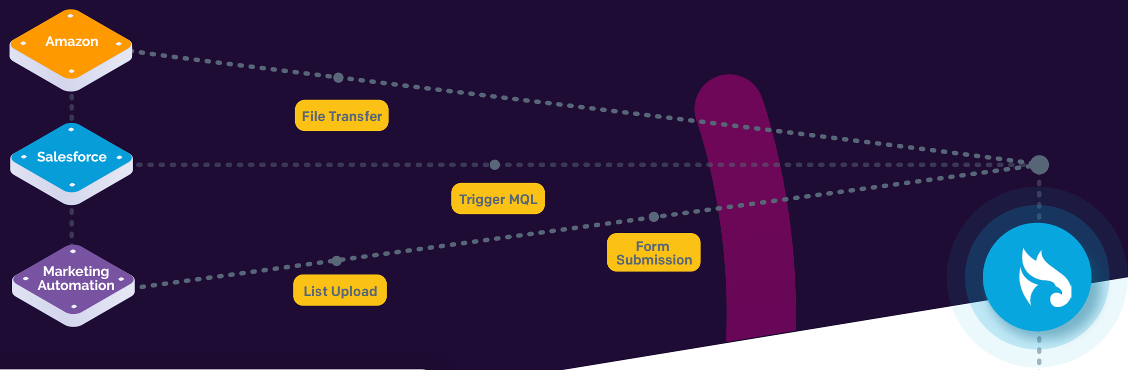
RingLead DATA ORCHESTRATION

The RingLead Data Orchestration Platform unifies, cleans, analyzes, and routes data through GTM systems to the correct place at the right time. Quickly transform raw data into actionable insights and processes to empower GTM teams to find the right customers, and convert them faster.



8 CORE FUNCTIONALITIES

Enrich data in batch & real-time to ensure your Go-To-Market data is complete & accurate. Integrate multiple data providers into multivendor enrichment workflows.

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.

Dedupe incoming leads to prevent duplicates from wreaking havoc among your sales and marketing teams.

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.

Propensity Scoring uses any combination of data points to define scoring models for leads and accounts.

Route leads and other CRM objects automatically, to the correct place, at the right time.

Book meetings automatically to convert leads into qualified conversations and accelerate the revenue engine.

Bulk Manipulations a flexible multi-table data manipulator that enables you to modify hundreds or thousands of existing records without complex manual work, lookups, or having to import or export Salesforce data (supports bulk API).

4 PRODUCTS

CLEANSE

Streamline your data management and readiness with patented data cleansing technology that identifies and corrects errors throughout your entire marketing and sales stack.

PREVENT

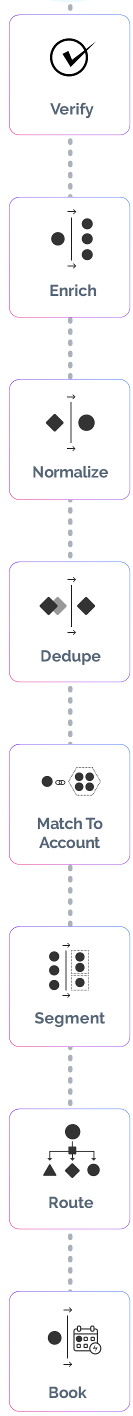
Proactively protect your data at the perimeter with powerful data optimization workflows at all points of entry to enforce data governance and fast lead follow-up.

ENRICH

Easily find, integrate and orchestrate data from multiple data providers into their Salesforce and Marketing Automation platform while ensuring that the data is standardized and segmented to their unique business requirements - ensuring your data is up to date everywhere with the best data possible.

ROUTE

Proactively protect your data at the perimeter with powerful data optimization workflows at all points of entry to enforce data governance and fast lead follow-up.



CLEANSE

Completely automate your database hygiene by detecting and correcting the many different types of data errors that exist in your CRM or MAP database.

Orchestrate updates to your existing data existing CRM & MAP dataset without having to import or export.

FEATURES

Flexible Merging Rules

The RingLead Merging module allows you to have complete control of how duplicates merge into a single record.
Best practice templates are baked into the interface that you can customize with flexible IF/THEN Boolean statements to determine the master record and which fields will combine or be prioritized in the final merge.

Baked-In Orchestration

Implement prerequisite processes like multi-vendor enrichment, verification, and normalization into deduplication tasks.
This increases match rates by properly formatting, verifying and completing fields to match against, while enhancing the completeness of the data in the final merge.

Bulk Task Scheduler

Run bulk data updates and deduplication tasks at a frequency of your choice. Set to occur daily, weekly, monthly or customize to fit your unique business requirements.
In addition, rather than scheduling tasks to automatically execute on completion, you have the option to schedule alerts that prompt data managers to review and "click the update button" before pushing to Salesforce.

Bulk Lead-to-Account Matching

The Lead-to-Account module allows you to bulk link leads to accounts and bulk convert leads to contacts (retaining all activities and campaigns) at the matching account, according to the criteria you establish.
Additionally, when leads are matched to accounts, relevant account information is automatically written to lookup fields on the lead, which is crucial for processes like lead segmentation and lead routing.

Pre-Merge Editing

View and edit pre-merge reports and edit each duplicate group's final output at the field level prior to pushing your bulk task to Salesforce.
This feature also allows you to export your merge reports into a .csv file, and could be useful during the early stages of cleansing, when approval of duplicate merges is needed from your team and stakeholders.
The pre-merge function is applicable to all batch data updates and insert processes like normalization, reassignments, list upload etc.

Cross Object Deduplication

In addition to single table deduplication, you can find and merge duplicates at the cross-object level, such as matching and merging leads into existing contacts. When users convert or merge across objects, all relevant attachments, campaigns or information can be merged into the surviving record.

Flexible Fuzzy Matching

Take advantage of best practice duplicate matching recipes and utilize fuzzy matchers on any combinations of fields to identify duplicates according to your unique business requirements.
The RingLead fuzzy matching criteria allows you to find and match duplicates like Bob and Robert, and match company names like GE and General Electric. You can craft AND/OR Boolean statements to match duplicates that wouldn't be matched by your native CRM/MAP solutions. Use any combination of fields, and even match across fields (i.e. website to email domain) to detect duplicates.

Automate Standardization & Data Correctness

Customize pre-built batch normalization templates to fix typos, proper-case data, fix data errors, and unify your data to a standard format that fits your business needs.

Custom Object Deduplication

Dedupe any standard or custom object while taking advantage of pre-built best practice templates and a flexible drag-and-drop configuration for matching and merging duplicates.

Advanced fuzzy matching criteria ensures higher match rates than other data quality vendors and offers advanced merging algorithms that extract the most value from the data being merged.

Marketing Automation Specific Deduplication

Run the batch deduplication task on your marketing automation platform without having to connect to your Salesforce. This allows you to bypass deduplication limitations so you can incorporate more customization into your matching and merging criteria.

Mass Delete

Use Mass Delete to find and delete thousands of junk data files in just a few clicks. Users have the ability to undelete records within 15 days of deletion. This allows you to purge junk data like old email attachments and Salesforce task attachments that lead to storage overage charges.

Mass Update

Mass Update is a flexible multi-table data manipulator that enables you to modify hundreds or thousands of existing records without complex manual work, lookups, or having to import or export Salesforce data (supports bulk API).

PREVENT

Proactively protect your data at the perimeter with powerful data optimization workflows at all points of entry to enforce data governance and fast lead follow-up.

FEATURES

As-You-Type Duplicate Prevention

Install RingLead as a managed package into Salesforce to prevent duplicates and unstandardized data from being entered via manual entry.
Dupe alerts notify users as they type new records into Salesforce if there is a matching account, lead, or contact so records can be updated BEFORE the duplicate is created. Salesforce and other data quality vendors can only dedupe and alert admins after the record is created.

Trigger-Based Orchestration

With the RingLead API trigger, you can standardize, dedupe, enrich, and validate records any time they are created or modified in your CRM and connected systems.
This ensures that all of your connected systems have the data they need in the right format for your company to optimize digital capabilities.

Real Time Lead to Account Matching

Take advantage of best practice templates to customize update actions when an incoming record matches an account. The criteria you set up will either autolink the matched lead to the account, auto convert to a contact and even auto create opportunities and accounts.

Prevent for Webforms

Automate deduplication and orchestration BEFORE records enter your CRM from inbound Web Submissions.

Real-Time Normalization

Standardize incoming records to fit your unique business requirements as records are created or modified.
This ensures that incoming data is correct, and in a format that is able to be immediately operationalized by your routing workflows, segmentation logic, and other automation technologies.

List Import Automation:

The List Import Module allows you to seamlessly import data with confidence from list files into your Salesforce while ensuring that no duplicate, incomplete, and unstandardized data enters.

A drag-and-drop interface allows you automatically map list files to align with your existing dataset, which can be customized to your specific business requirements and saved for future recall.

Take advantage of customizable best practice templates to seamlessly configure how the values from the list update and append data to your existing leads, contacts, and accounts and custom objects.

Easy-To Assign Campaign, Tasks, & Routing

Easily create custom criteria that assign Salesforce tasks to owners of new and matched leads, contacts, and

Flexible & Easy Set Up

Designed for citizen data managers, real-time prevention is easy to set up and does not require development support. Immediate time-to-value with best practice templates that guide you through the process of defining fuzzy matching criteria to detect duplicate records across any scenario.
In addition, it helps you build multiple scenarios for which incoming data should be inserted into your existing dataset, in accordance with information on the incoming record and matched existing record.

ENRICH

RingLead's data orchestration platform allows companies to easily find, integrate and orchestrate data from multiple data providers into their Salesforce and Marketing Automation platform in minutes, not days—while ensuring that the data is standardized and segmented to their unique business requirements.

FEATURES

Pre-built Integrations

Prebuilt integrations and a customizeable no-code interface allows users to connect any data enrichments vendor(s) in minutes -- not days

Easy to Use & Flexible Integration Designer

RingLead drag-and-drop visual process builder to instantly connect to, map, re-format, and normalize both data sources into their existing workflows, segmentations, and naming taxonomy

Intelligent Forms

As prospects fill out forms on your website, Intelligent Forms automatically appends the data needed to segment, route and score your leads in real-time in accordance with your multi vendor enrichment waterfall.
Copy and paste a single line of Javascript on the backend, that embeds validation elements like IP address lookup, company-name-type-ahead-selectors and phone number, area code, geolocations that provide prospects with a quick and fluid form fill experience, while ensuring that your automation systems has the information it needs.

Field Level Multi-Vendor Waterfalls

Operationalize multiple data providers by creating multi-vendor enrichment waterfalls on each field to ensure higher match rates and more accurate data.
Easily assign multiple vendors to enrich a single field by creating if/then Boolean statements that determine which vendors are called on across multiple scenarios.
You can streamline the set up process by customizing pre-built templates that allow you to ensure that that right type of data is enriched by the right data provider.

Fill Rate Reports

No single data provider is right for all of your Salesforce fields. The average single data provider only matches with 30-40% of your fields.
The RingLead Data Exchange is a third party data search engine that integrates seamlessly with RingLead data orchestration processes so you can seamlessly build multiple vendors into your enrichment workflow.
Read peer reviews and test third party data provider match rates against your existing data set to ensure that the data you buy is right for your business.
You can select one set of data providers to enrich your contact data, select another to enrich your technographic account data, and select another to enrich your verified email addresses.
Easily swap in and out multiple providers as your needs change.

Propensity Scoring

Use any combination of data points to define scoring models for your target accounts.

Activity/Trigger Based Enrichment:

Specify types of activity in your Salesforce and connected systems that prompt RingLead to enrich and orchestrate your data.
Customize best practice templates that ensure you have the right data for all your business processes.
For example, enrich and orchestrate your data any time a lead becomes an SQL, to ensure that sales people and systems have the right data, in the right format.

Always-on Scheduled Tasks

Run bulk data enrichments tasks at a frequency of your choice. You can set them to occur daily, weekly, monthly or whenever fits your organization's specific requirements.

Batch Enrich

Enrich Salesforce data in bulk WITHOUT having to import or export. The changes take place at the Salesforce data center.
Easily configure multiple variations of enrichment tasks that operate on different subsets of data, and utilize different types of enrichment and verification workflows, to enrich and orchestrate your data in bulk.

Automate Third Party Standardization

Easily create criteria that specifies how you multi-vendor enrichment tasks merge into your existing data.
In addition to specifying "do not overwrite" and concatenate criteria, apply RingLead orchestration automation to third party data provider data as it flows into your Salesforce.
All third party data providers data will be standardized and segmented in real-time to fit your organization's unique requirements, not the other way around.

Automate List Upload Enrichment

Automate the process of enriching, orchestrating and deduping list files against your existing dataset.
With the List Import module you can import new leads and update existing records and campaigns in one process.
Whether uploading a lead list from a data provider or a trade show list, List Import removes the manual labor, lag, and stress associated with uploading data from external sources.

Prerequisite Orchestration Processes

Deploy RingLead's deduping, lead-to-account matching, normalization, segmentation, and data fixing algorithms to prepare your data first, ensuring a higher match rate with any vendor's data.

In addition, the process of preparing your data with flexible automation will set the framework for optimizing and structuring enriched data points.

Segmentation

Segmentation enables precision targeting. You may want to create segments for Ideal Customer Profile, Buyer Persona, or Customer Journey Stage, for example. With precise segments, you can create targeted campaigns to nurture best-fit accounts, identify whitespace opportunities, and align parallel priorities with sales.

ROUTE

RingLead Route allows you to validate, enhance, normalize, segment, match, link, and route new leads, contacts, accounts, opportunities, and other objects in a single flow. With easy-to-build, visual automated workflows that consolidate all of these functionalities into a single flow, RingLead is the fastest, most accurate, lead routing solution in SaaS.

FEATURES

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.

High-level Conditions

RingLead Route analyzes five high-level conditions before routing to determine the appropriate workflow: Account Match, Contact Match, Person Lead Match, Company Lead Match, & No Match.

Simple Workflows & Visual Interface

View and edit your workflows, rule criteria, owner options, and field updates without the need for complicated decision trees.

Complex Routing Workflows

Easily set up complex routing workflows, utilizing a visual flow builder and/or a drag-and-drop interface to deploy routing rules based on business needs.
Easily build various if/then statements into routing workflows to enable optimal lead routing across multiple scenarios that depend on incoming lead and matched existing lead, contact, or account.

Time-Based Routing

Set up time based routing using any Salesforce standard or custom field with RingLead date/time operators. For example, skip over reps who are traveling or where it is outside their working hours.

Simple Visual Interface: Rule Based & Flow Chart

With a flow chart and drag-and-drop ease, design your workflows and make quick updates.

Round Robin Routing

Set up multiple round robin pools to support complex assignment for leads, contacts, accounts, & opportunities. Customize to ensure even and fair distribution to sales reps.

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.

Routing Log & Activity reports

Easily you monitor and improve your lead distribution process with activity reports and one easy-to-view dashboard.

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.

Built-In Segmentation

Prerequisite segmentation is dynamically linked to your routing workflows, which streamlines the process of building routing rules. For example, during industry-based routing, instead of mapping hundreds of NAICS and SIC codes into your routing rules, easily attach consolidated industry segments that automatically buckets the related field values.

Pre-Requisite Orchestration

Ringlead pre-requisite orchestration processes solve common data problems that obstruct and cause dysfunction in routing workflows. Meaning, prior to being routed, incoming leads are enriched, normalized, deduplicated, matched to an account, and segmented.

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 requireme

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.

Opportunity Routing

Easily implement rules that trigger opportunity routing. Develop criteria that auto-creates opportunities, updates specific opportunity fields and notifies owners of new opportunities assigned to them.

Account Based Routing

RingLead Route optimizes prerequisite account enrichment and lead-to-account matching processes allowing you to set up routing based on the account.
Leads based on the account owner utilize account segmentation and account fields, like technologies used, and NAISC code, company size, in your lead routing logic.

Automatic Field Updates

Change data on either the record being processed or any matching/related record.

Trigger Tasks & Alerts

Create custom criteria to notify & assign Salesforce task to reps when action is required. and increase accountability throughout the organization.

Re-Routing

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.

Triggers & Multiple Endpoints

Customize any lead or account activity to trigger a lead be assigned to a routing workflow. Routing triggers can be integrated to any of your CX datasets or external systems.

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.