



11 COMPANIES THAT HAVE ACCELERATED
**LEAD ROUTING, SPEED TO
LEAD, & CONVERSIONS RATES
WITH RINGLEAD**

www.ringlead.com

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Why is Lead Routing is the most critical revenue process?

Being able to efficiently maintain a high-volume and high-velocity revenue funnel is a requirement for any fast-growing company—which is why Lead Routing the most critical revenue process.

Most Businesses Are Losing Leads due to Slow Lead Response

Delays in the lead-to-revenue process, particularly when it comes to lead follow-up, can destroy a company's sales funnel. Slow lead routing and response times make it 7x less likely for a company to qualify leads.

How using multiple point solutions slows down lead routing

Lead intake and routing are built on a rigorous, complex set of jobs. Unfortunately, many businesses have these jobs built asynchronously within a myriad of third-party tools that delay and cause errors in lead assignment.



30% of your leads will choose one of your competitors if you don't respond.

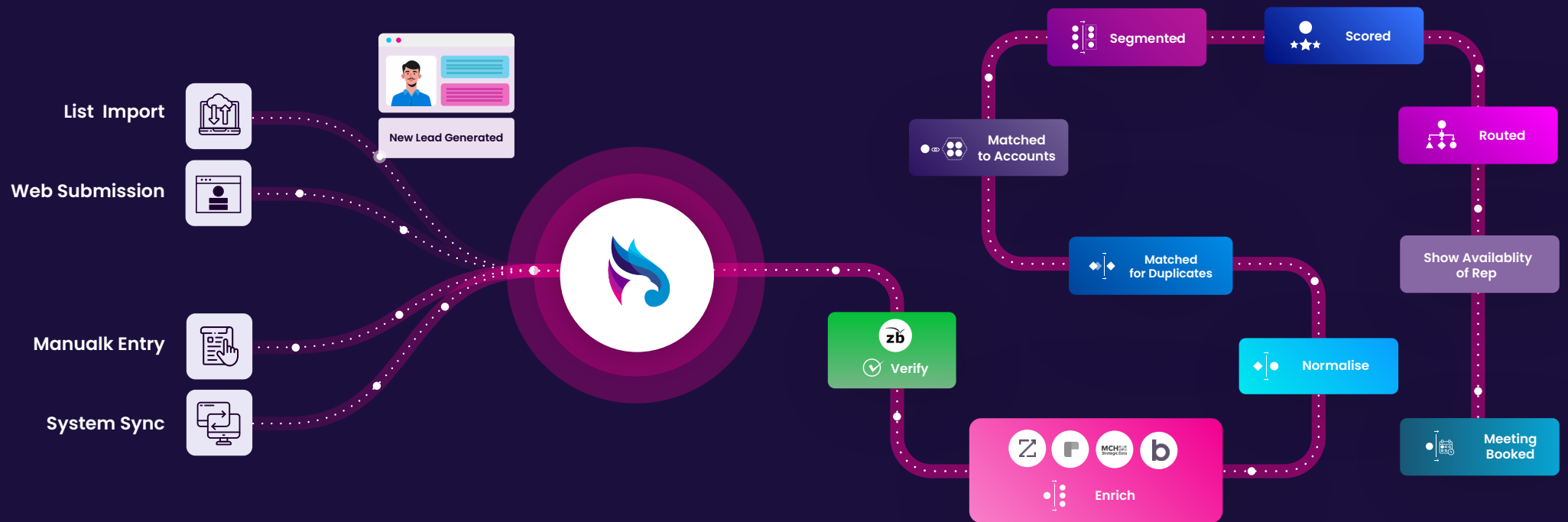
— Website Builder

Study: Lead Response time is the biggest determinant of Marketing-to-Sales conversion rates

Before RingLead, our Routing was not accurate or timely. It used to take three days to route Leads. With RingLead, it only takes minutes to route and respond to Leads, because we can easily set up rules and configure the entire workflow in 1 platform.

— **Matt Kromer**,
CRM Marketing Manager at Spectrum Enterprise

RingLead Automates The Entire Data Processing Workflow



"RingLead consolidates multiple tools into one. Not having to log into three or four different platforms is super valuable because it takes less time for me to troubleshoot. When I'm able to have one tool that does three jobs, that tool is worth more to me than three that do this job that do not talk to each other."

Luis David Real,
Revenue Operations Manager at OpenSpace

1. **Lead Capture** - Gain leads from a given source
2. **Validation** - Verify the validity of any imported email address
3. **Dedupe/Merge or Insert** - Create leads in the system of record if there are not any existing records for the prospect already
4. **Enrichment** - Use any combination of 3rd Party Data Providers to supplement the data required for routing or scoring
5. **Lead-to-account matching** - Utilize Account or any related object field to route and score leads
6. **Standardization** - Normalize enriched data values to a standard taxonomy (i.e. California = CA)
7. **Segmentation** - Create custom segmentation rules and group leads by job level, job role, industry, geography, or any other specialized grouping
8. **Scoring** - Score based on demographic, firmographic, behavioral attributes, and intent attributes
9. **Routing** - properly and swiftly assign leads to Sales Reps
10. **Sequencing & Booking** - Start sales outreach ASAP and book meeting

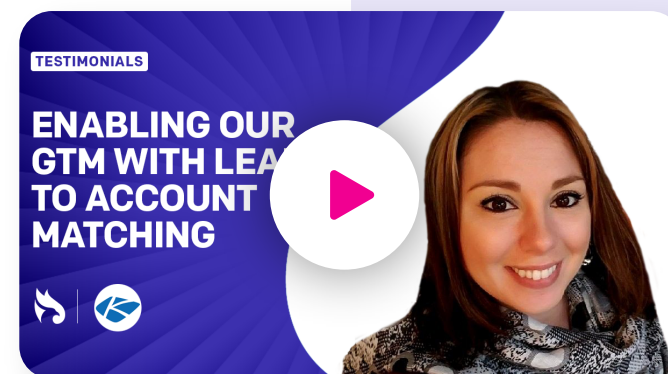
#1 Platform to Manage the Entire Process: RingLead Data Orchestration

With RingLead, Sales and Marketing teams have been able to consolidate all these processes into a single Data Orchestration Platform and flow step to streamline and empower their lead engines, enable their teams to manage a high velocity of inbound leads, and empower their go-to-market (GTM) initiatives.

“Enabling Acquisitions and a Land & Expand GTM”

Kaseya

Kaseya set up Deduplication and Lead-to-Account Matching into their routing workflows to enable a land and expand GTM strategy. Kaseya solved their existing duplicate problem and set up robust lead routing and orchestration workflows to accelerate their company's acquisition strategy by enabling a land-and-expand go-to-market.



BEFORE

- ✗ Land & Expand GTM Strategy didn't work
- ✗ Mergers & Acquisitions led to massive data problems
- ✗ Sales & Marketing Misalignment: Unable to Enforce SLAs
- ✗ Inaccurate & Slow Lead Routing caused high rates of lead abandonment
- ✗ Sales reps wasted hours of time manually re-routing leads or calling incorrectly routing leads

AFTER

- ✓ Accelerated Land & Expand GTM Strategy
- ✓ Accelerated company mergers & acquisitions
- ✓ Improved sales-marketing alignment
- ✓ Increased lead follow-up rate
- ✓ Boosted sales reps' productivity

Before RingLead, they were unable to set up workflows that allowed multiple business units to sell into the same account, as they needed the flexibility to enable purposeful duplicates at the lead level. Without the use of an intelligent routing system and data orchestration, they were unable to optimize their lead assignment, which limited their ability to implement their GTM.

Kaseya took advantage of RingLead's all-in-one orchestration tool and implemented multiple workflows for lead to account matching, deduplication, and lead routing, saving time and money and increasing conversion rates.



Juliet Forte, Marketing Ops at Kaseya, contributes the following to the conversation:

"Since we set up RingLead, our conversion rates have improved significantly. Sales reps are no longer wasting time on duplicates or incorrectly assigned leads."

We can retain hundreds of more leads per week by using intelligent routing for more speed and accuracy. With RingLead we know the lead is getting assigned to the accurate person. We have reduced our follow-up time by as much as half.

Lead to account matching is vital for our routing to support our land and expand strategy. We can now associate a new lead with the existing customer accounts, associate that record to the appropriate account manager, and make sure that they can grow and expand that customer relationship.

I recommend RingLead to any marketing operations or sales operations team with many duplicates they can't get a handle on within their system. If you are struggling with lead routing and implementing a robust lead routing platform to help you achieve your goals, RingLead can help.

"We consolidated our tech stack, and our routing is now accurate & much easier to manage"

Integrate

Integrate needed territory and account-based lead routing scenarios in their business. They also needed to route based on the Parent or Child relationship on an account . Prior to RingLead They were unable to perform these routing scenarios due to the following:



BEFORE

- ✗ Lack of a round robin functionality lead to tension amongst sales reps
- ✗ Inability to identify and preserve account hierarchies when deduplicating
- ✗ Inability to route based on account hierarchy or associated account territory
- ✗ Tech stack add-ons weren't adapted successfully due to a surplus of disparate tools to manage

AFTER

- ✓ Made round robin functionality possible
- ✓ Deduplication task allowed for preservation of account hierarchies
- ✓ Enabled routing based on account hierarchy or associated account territory
- ✓ Streamlined tech stack and facilitated add-on adoption

Integrate used RingLead's single-platform solution to apply both lead-to-account matching and normalization before deduplication. By enhancing leads with related account data and normalizing, Integrate has been able to prioritize which parent or child account a lead is linked to *and* remove any unwanted duplicates.

Using predetermined jobs and customizing them to run for different scenarios, complex routing has been made easy. By orchestrating their data, Integrate has gained route efficiency and significantly improved their speed to lead times.



With RingLead we only need 1 platform for data quality and lead routing," says Ashley Langford, Sr. Marketing Ops at Integrate and Marketo Champion.

"Leads are now assigned much faster, and routing is much easier to manage."

RingLead proved to be a better alternative to its main competitor for Routing & Lead to Account Matching—not only because it is more customizable & easier to use, but because it's a full platform.*

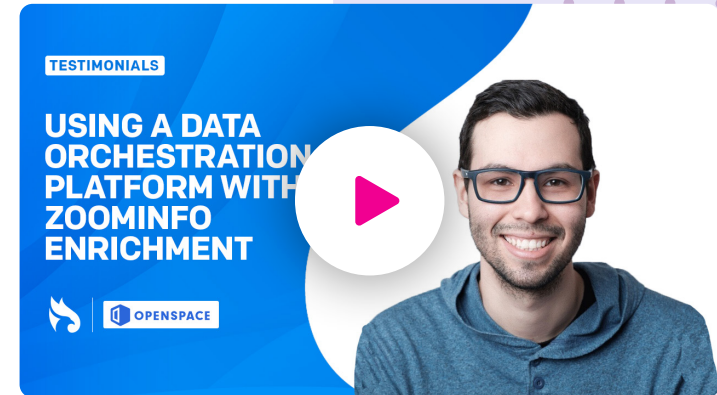
In one API call, a record is enriched, normalized, and routed to the appropriate SDR, this is all before it even hits Salesforce.

Deduplication is a great precursor to exceptional lead routing.

“Leverage Multiple Third-Party Data Sources in a Single Flow”

Openspace

Openspace relies on **Lead-to-Account Matching**, **Enrichment**, and other processes automated by RingLead to make their routing accurate and unify data silos.



BEFORE

- ✗ Lack of a round robin routing process
- ✗ Inefficient integration with 3rd party data vendors slowed down lead routing
- ✗ Time-consuming manual routing steps
- ✗ Messy routing process slowed lead follow-up
- ✗ Disparate solutions lead to errors and lag in lead routing

AFTER

- ✓ Round robin routing process enabled
- ✓ More efficient lead routing and follow-up
- ✓ Saved time due to process automation
- ✓ Consolidation of processes to one platform meant less time troubleshooting

Prior to implementing RingLead, the routing and lead follow-up process at Openspace was chaotic. The round robin process was essentially nonexistent, and existing messy routing steps required a lot of time-consuming manual effort.

Luis David Real, Revenue Operations Manager at OpenSpace, has been able to cultivate massive change with RingLead. Not only has he set up redundancies to unify data silos and operationalized formerly manual processes but he also takes advantage of RingLead's Zoominfo integration to flesh out leads before they are routed.

This change has facilitated more efficient lead follow-up and has reduced internal tension among teams. Time is saved through automation and through a decreased need for training. Openspace has an all-around more agile lead lifecycle.



"Before RingLead, multiple API web-calls significantly slowed down our lead-routing process. Now, ***RingLead does all of the heavy lifting. Having a tool like RingLead makes me more valuable.***"

—***Luis David Real,***
Revenue Operations Manager at OpenSpace

“More Effective Sales and a Direct Impact on Pipeline Conversion & Revenue”

Altium

Iryna Zhuraval increased conversion rates and the overall effectiveness of Altium’s sales team with real-time **Lead to Account Matching & Deduplication.**



BEFORE

- ✗ Sales reps were wasting hours every week due to poor lead routing and duplicates
- ✗ Hundreds of duplicates plagued their database and hindered GTM motions & reporting
- ✗ Low conversion rates due slow follow up and unreliable routing
- ✗ Accidentally treating customers like prospects damaging brand reputation
- ✗ Multiple sales people mistakenly calling into the same account during sales cycle hurt brand reputation

AFTER

- ✓ Improved sales reps' productivity and efficiency
- ✓ Removed 200,000 duplicates from CRM and MAP
- ✓ Lifted conversion rates
- ✓ Improved brand reputation

Altium's sales team realized they were wasting hours per week due to incorrect lead routing. Altium also found they had a surplus of duplicates in Salesforce and Marketo and that hundreds of duplicates that were entering their GTM systems every day, which was keeping sales conversion rates low.

After removing 200,000 duplicates from Altium's Salesforce and Marketo, Altium streamlined their lead intake process with real-time lead to account matching and deduplication workflows - which Iryna says "had a direct impact on revenue and pipeline."



RingLead Lead to Account Matching & Dedupe accelerated our sales cycle which had a direct impact on our pipeline and revenue growth. Sales is no longer wasting time on duplicate leads or calling leads at customer accounts.

—**Iryna Zhuravel**,
Head of Growth at Altium and 2x Marketo Champion

“Before Ringlead we we couldn't quickly score, follow up with, or prioritize leads”

Esko

See how Esko applied **Normalization, Enrichment, and Lead-to-Account Matching** to prioritize, distribute, and follow up with leads faster.



BEFORE

- ✗ Leads couldn't be scored
- ✗ Leads couldn't be prioritized
- ✗ The competition was following up on leads faster
- ✗ Esko lost the lead, lost the opportunity, the sale

AFTER

- ✓ Enabled lead scoring
- ✓ Conversation rates increased due to ability to prioritize Leads
- ✓ Became competitive with lead follow-up
- ✓ More deals won

Before RingLead, Esko had many leads coming through their website, but they were not following up on them. The company needed to identify and prioritize leads, but poor database hygiene, incomplete record data, and a lack of lead-to-account matching meant they couldn't, so:

Esko fixed this problem with RingLead's platform to perform a range of functions to enable them to prioritize leads and contact them quickly. They enrich their data as soon as possible so they can then match leads to account. The company then uses RingLead's account-based scoring & segmentation to prioritize leads based on the enriched information.

Their new prioritization helps in identifying the best potential leads for sales coordinators to follow up with. It helps them know which ones to answer and without all the manual processes they can contact their leads quickly, before the competition.



It was so hard to prioritize them, we didn't know what the best leads were to follow up. Important leads were not identified and were stuck for days in our Salesforce. It lost us money.

—Bart Audenaert,
Marketing Database Specialist at Esko

“I am no longer spending my entire day fixing bad data or re-Routing leads”

Cockroach Labs

Cockroach Labs united their GTM systems and multiplied the impact of their RevOps team by by setting up real-time **Normalization and Duplicate Prevention** triggers.



BEFORE

- ✗ Data wasn't normalized, so routing couldn't function
- ✗ Hours of time wasted by Admin spent manually re-routing leads
- ✗ Leads created via hubspot were creating duplicates in salesforce
- ✗ Sales people calling on the same lead hurt brand reputation and wasted time

AFTER

- ✓ Made fast and accurate lead routing possible
- ✓ Accurate lead routing saved hours of time
- ✓ Duplicates eliminated from the database
- ✓ Eradicated redundant efforts, improving brand reputation

Cockroach Labs routes leads based on Location and Revenue, so when their data isn't normalized, the routing rules aren't applied and chaos ensues.

Cockroach applied RingLead's duplicate prevention and data normalization to ensure leads are routed to the right sales rep. "This saves me countless hours per week that I used to spend manually re-routing leads," Nick says. "I am now spending more time on initiatives that have much higher impacts on our organization's bottom line."



"Our routing didn't work before using RingLead to dedupe, normalize, & segment all leads."

-Nick Lauricella,

Marketing Operations Manager at Cockroach Labs

Making ABM & Account Based Routing Possible

Watermark

Watermark Insights not only enriched their data, but harnessed single platform data orchestration to **normalize, enrich, deduplicate, segment & score** their database



BEFORE

- ✗ 10,000 duplicates created overnight after a company merger
- ✗ No relationship between leads and accounts and incomplete data
- ✗ Slow Lead Follow Up & Conflict Between Sales Reps
- ✗ Unable to Score & Prioritize Leads
- ✗ Account Based Lead Routing wasn't possible

AFTER

- ✓ 100,000 duplicates removed
- ✓ Gained a more accurate view of accounts and leads by using account data at the lead level
- ✓ Automated more complex and faster lead routing, easing tension amongst reps
- ✓ Prioritized leads based on propensity to buy

Thanks to Ringlead, Watermark Insights was able to cleanse their data following an acquisition and remove 100,000 duplicates in a few weeks. By enabling deduplication and lead-to-account matching they gained a more accurate view of accounts and leads by using account data at the lead level. Using segmentation and scoring, Watermark was able to prioritize accounts for both their sales executives and marketing efforts.

Watermark now orchestrates their data as it flows through their operations. With each process their records go through, the more accurate and useful their database becomes. With complete, rich and current data on their records can automate complex lead routing scenarios and route leads quickly to reps.

“

With RingLead we can enrich our database for leads, contacts, and accounts and use orchestration to normalize, cleanse, deduplicate, segment our data and match leads with accounts. We have been able to leverage all these functions to enable fast and accurate routing of the right leads to the most suitable reps."

-Austen Adair,
Vice President of Sales Enablement

“

"It's essential for us to have understanding of the account to be able to fire the complex routing rules that we have in our organization."

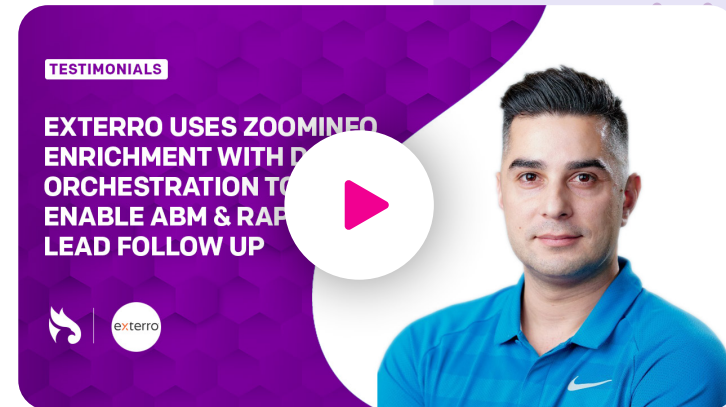
—Calon Alpar,
Senior Manager of Demand Generation

Orchestrating Workflows to Expand into New Markets

Exterro

See how Exterro expanded into new markets by integrating Zoominfo contact data into their complex routing workflows empowered by **Multi-Vendor Enrichment, Segmentation, Deduplication, and Normalization.**

Lack of intelligent routing prevented Exterro:



BEFORE

- ✗ Unable to support rapid growth
- ✗ Unable to efficiently support expansion into new markets due to stringent routing criteria in Salesforce
- ✗ Native Salesforce routing did not provide the cross-object referencing needed to route Leads to Accounts based on an account's location
- ✗ Speed-to-lead and conversions were subpar

AFTER

- ✓ Supported rapid growth and expansion
- ✓ Provided the cross-object referencing needed to route Leads to Accounts based on an account's location
- ✓ Speed-to-lead improved and conversions followed

Exterro's growth and expansion into new markets meant they needed more efficient processes for operations. They needed to cater to different market types and regional territories with different routing strategies using Regional Territory's for accounts, Round Robin for the global market, and State Ownership for US leads. Using native Salesforce routing had worked in the past, but this no longer met their needs as it did not provide the cross-object referencing needed to route Leads to Accounts based on an account's location.

Exterro chose RingLead as their routing solution as it provided flexibility and scalability for complex routing. The team has leveraged deduplication, normalization, enrichment, and segmentation in addition to routing, resulting in high-quality data that empowers effective lead routing for more positive sales outcomes.



*"RingLead does **so much more than just routing**. I could see that I could do real time enriching through third party tools that were integrated, deduplication and duplicate prevention, as well as normalization.*

I get to be the hero at my company because I'm able to route leads quicker and cleaner and my CFO feels comfortable that she was able to purchase a software at a price that she felt comfortable with."

Cody Bustamante, Salesforce Administrator & Marketing Operations Manager at Exterro, had the following to say about the RingLead platform:



"Automated, Accurate Routing and Faster Lead Follow-Up and Optimal Conversions"

MCG Health

MCG Health used **Normalization, Lead-to-account Matching, and bulk updates** to manage territories, align teams, and increase the effectiveness of their sales machine.



BEFORE

- ✗ Underlying data challenges in their CRM were eroding the success of their marketing and sales activities and ROI
- ✗ Salesforce instance was 15 years old, contained obsolete data and thousands of duplicate records
- ✗ Leads were not linked to accounts, resulting in missed opportunities due to slow or no contact
- ✗ Unable to efficiently manage territories when changes were made at organization

AFTER

- ✓ Marketing and sales activities could be conducted more fluidly
- ✓ Cleaned up 15 years' worth of obsolete data and duplicates
- ✓ Lead-to-account matching enabled routing and ABM
- ✓ Enabled continuous territory management

MCG Health was experiencing poor follow-up time due to inefficient lead routing. Not only that, but data challenges like decay and lack of standardization were eroding the success of their marketing and sales activities and ROI.

By performing mass updates and data normalization using RingLead's Data Orchestration Platform to standardize data such as State, Job consistently flows through their systems for routing, reassignment, and reporting. MCG Health now enjoys automated, accurate routing to the right people and faster follow-up by Account Owners to optimize lead interest and conversions.



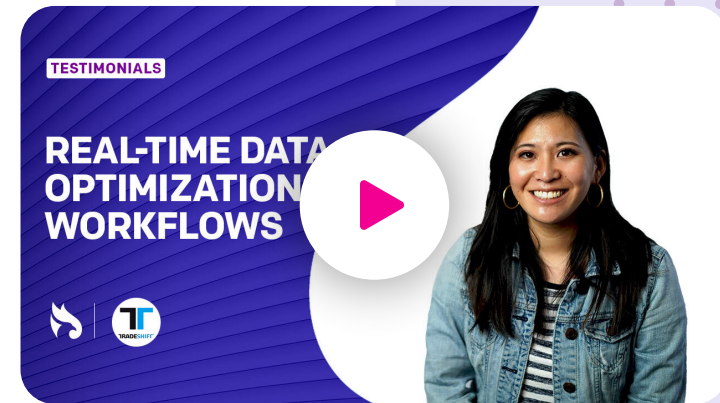
Lead-to-Account Matching enables routing** and ABM.

—**Brian Vaughn**,
Director, Sales Operations at Medical Review Institute of America

“Our Lead Routing Didn’t have the Information it Needed to Function”

Tradeshift

Tradeshift leveraged **Deduplication and Enrichment** to maintain opt out compliance and increase conversion rates with faster more informed lead follow-up. The lack of vital data reduced their lead routing automation functionality, resulting in:



BEFORE

- ✗ Hours wasted daily performing manual routing
Reduced workflow and assignment efficiency
- ✗ Incomplete data prevented sales from being able to pursue informed follow-up
- ✗ Incomplete data didn't allow routing rules to work, impairing speed to lead
- ✗ Lack of ability to trust in quality of CRM data

AFTER

- ✓ Automated routing meant saving time
- ✓ Increased overall workflow efficiency
- ✓ More complete records improved follow-up speed and success
- ✓ Increased ability to trust in data as a single source of truth

Inbound leads coming in through Tradeshift's webforms did not contain the data that was necessary in order for their automated routing rules to work. Tradeshift was missing data throughout their database, impacting critical functions like routing.

Tradeshift began their journey by using RingLead to cleanse and deduplicate their lead records—but it didn't stop there. Tradeshift was ultimately able to integrate with multiple data providers and leverage standardization and segmentation as needed. They can now define and enrich records based on the data required for their automated routing rules, enabling a seamless flow to their sales teams.



*"Lead routing wasn't going as expected because we were simply missing the information we needed for our lead routing rules to function. **It was really helpful to add the Enrichment piece.**"*

—Mari Miyamoto

Product Manager, Internal Systems at Tradeshift

“Before Introducing RingLead to our workflow, we didn’t have reliable attribution”

Datto

See how duplicate **Normalization, Deduplication, and Lead-to-Account Matching** helped Datto improve their Salesforce and Marketo performance.



BEFORE

- ✗ ABM campaigns were performing poorly because of a lack of robust lead-to-account matching
- ✗ Duplicates pervaded their systems, inflating storage costs and making reporting and marketing attribution nearly impossible
- ✗ Non-standard data sabotaged their lead assignment model; leads could not be properly routed because of acronyms, typos, and other formatting issues
- ✗ Delayed follow up drove conversion rates down drastically

AFTER

- ✓ Empowered ABM campaigns
- ✓ Removed duplicates from the system, reducing storage costs and enabling attribution
- ✓ Standardization tasks made proper lead assignment possible
- ✓ Faster speed-to-lead facilitated higher conversion rates

Datto was using Salesforce and Marketo as the main components of their sales/marketing operations. However, they had a myriad of data issues hampering performance and driving down ROI on the software investment:

Datto deployed the RingLead Platform to try and tackle all of their data quality problems, rather than rely on point solutions to piece together their data quality strategy. After launching and implementing RingLead Cleanse and Prevent, Datto saw noticeable improvement in their Salesforce and Marketo performance.

In addition to being able to accurately attribute leads to opportunities without duplicates skewing metrics, the company optimized the lead-to-rep process by routing leads based on standardized field values.



“RingLead helps us with duplicates, routing, and lead-to-account matching.”

—Dory Viscogliosi,
Marketing Compliance Program Manager at Amazon Web Services

As you can see, when it comes to data orchestration for optimal routing, a singular solution is a sustainable solution—one that can grant ongoing security when it comes to data health and intelligent routing.

Lead intake, validation, deduplication, and all of the other processes involved in end-to-end lead processing can flow seamlessly towards better speed-to-lead, increased conversions, and more revenue.



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