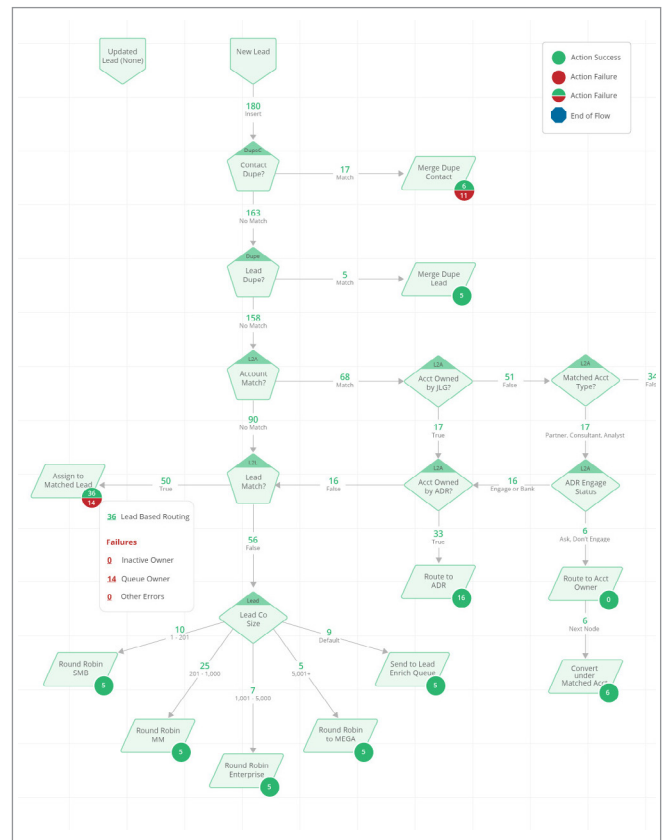


Remove Friction From Your Funnel

As Sales and Marketing interact more frequently, there is an unprecedented level of friction within the B2B sales and marketing funnel. This friction is visible when leads are assigned to the wrong person or get lost in the system, resulting in a poor buying experience for the prospect. This also affects sales productivity and marketing ROI. LeanData Routing allows teams to build, monitor and optimize custom routing flows for leads, contacts, accounts and opportunities. It enables you to maximize the full potential of your Demand Generation and create great buying experiences for prospects.

The Gold Standard for Routing in Your CRM

- Co-design Easily:**
 Visual FlowBuilder with a drag-and-drop interface to collaborate and deploy routing rules based on business needs
- Optimize Continuously:**
 Routing Insights help you monitor and improve your lead distribution process and also fine-tune it based on seasonal or strategic priorities
- Automate Salesforce Actions:**
 Eliminate manual errors by applying automated actions such as merging duplicates, converting leads to contacts, creating new accounts/opportunities, round-robin assignments, etc.



Route Leads And Other Objects. Monitor Flows. Iterate Easily.

Report on Routing Insights

With just a click from any routing action node, you can see details of objects that were successfully routed or caused errors, as well as the owners to whom they were assigned.

Date Range: 07/16/2018 to 07/16/2018 | Type: All

ACTION / ROUND ROBIN							
Type	Company	Full Name	Email	Lead Status	Pre-Owner	Post-Owner	Created Date
New	A Big Company	Sam Martin	sam@bigcompany.com	Open - Not Contacted	Madhura Dani	Hendrick Lee	07/16/2018
New	A Big Company	Melanie Shaw	melanie@bigcomp.any.com	Open - Not Contacted	Madhura Dani	Jonathon LG	07/16/2018
New	A Big Company	Pratik Venkataraman	venkat@gmail.com	Open - Not Contacted	Madhura Dani	Sara Kim	07/16/2018
New	A Big Company	Steve Flats	steve@yahoo.com	Open - Not Contacted	Madhura Dani	Lisa Ray	07/16/2018
New	A Big Company	Sheena	sheenab@bigcomp	Open - Not Contacted	Madhura Dani	Jerome Kim	07/16/2018

Email Notifications

Use editable email templates to inform owners when they've been assigned leads or other objects and alert users of errors in assignment.

The screenshot shows the 'Email Notification' configuration window. At the top, it says 'Send an email notification to the new lead owner.' There are two sections: 'Send Success Notifications (will be sent to assigned lead owner)' and 'Send Failure Notifications'. Each section has a dropdown for 'Email template' and a text input for 'Emails'. The success notifications are configured with the template 'SUPPORT: Self-Service New Comment Notification (SAMPLE)' and emails 'tom@toyotausa.com, jill@gmail.com'. The failure notifications are configured with the template 'Routing Failure' and email 'support@toyotausa.com'. There is an 'Advanced Settings' link and 'Cancel' and 'OK' buttons at the bottom.

One-Time Routing

Use the one-time routing option to distribute leads, contacts, accounts and opportunities in one go; for instance upload all contacts within a set of accounts and redistribute ownership to account owners.

The screenshot shows the 'One-Time Routing Setup Wizard' with three steps: '1 Select Lead File', '2 Select Router Flow', and '3 Confirmation'. The current step is '1 Select Lead File'. It prompts the user to 'Select a CSV file' with a 'Select File' button. Below this, it shows the filename 'report1520616598270.csv', the number of rows '112385', and a checked checkbox for 'Include header row at the top'. There is a dropdown menu to 'Select a column with Lead ID' currently showing '*Account ID*'. A 'Next' button is at the bottom.

Why LeanData?

Built upon the best-in-class matching technology, LeanData Engagement is the most simple, accurate, and actionable engagement analytics tool in the market.

LeanData provides the market's first Revenue Operations platform for accelerating revenue and growth in B2B. Standing at the center of Salesforce CRM, LeanData's family of solutions orchestrate and automate the go-to-market process to help revenue teams close more deals and drive more revenue, faster. Visit leandata.com to learn more about LeanData's revenue operations solutions for Lead-to-Account Matching, Routing, Engagement and Marketing Attribution. Or visit us on AppExchange.