



Zoom Uses LeanData to Manage and Scale Exponential Lead Growth

- With Caterina Torres, Team Lead, Sales Data Systems and Process Management and Michael Fedynyshyn, Senior Manager, Sales Operations and Strategy

Zoom Video Communications, Inc. is the leading video-first unified communications-as-a-service company in the IT industry. The organization has been in a high growth phase for the past several years, and the Sales Operations and Strategy team now spans four continents.

As Zoom's business evolved, the company recognized a need to have systems in place that could scale with its growth and allow the company to be nimble. In 2019, this led Zoom to seek out a lead management solution.

Over the years, Zoom had built out custom matching and routing rules in Salesforce, but as they grew, it became increasingly difficult to manage the sophisticated rules they needed in place. The company's Sales Operations and Strategy team relied on developers to make changes to their processes, which took time and planning. In addition, other projects were generally prioritized because the current lead management process did work—however, the team knew it could be improved.

"We weren't able to keep up with changing corporate initiatives, and we needed to be more agile," said Michael Fedynyshyn, Senior Manager, Sales Operations and Strategy at Zoom.

"We were running before we walked," added Caterina Torres, Business Analyst and Team Lead, Sales Data Management at Zoom.

Zoom's team needed to step back and examine CRM processes from an operations standpoint, as well as an overall business perspective.

An agile and supportive vendor partnership

Zoom initially considered continuing to match and route leads using existing internal resources. However, some of the company's team members had used LeanData at previous organizations and recommended the solution. Zoom ultimately decided that it needed a vendor that could adapt to the business's growth, and LeanData was the company's top choice.

"LeanData offered everything we needed—agility, the ability to move quickly to keep up with us, and a real partnership," Fedynyshyn said.

Zoom had an aggressive timeline of three months (January to March 2020) to implement the software before the company's next quarter started, and to align with its internal Salesforce release schedule. During that time, Zoom worked closely with LeanData to build and execute an implementation strategy.

INDUSTRY

Information Technology & Services

HEADQUARTERS

San Jose, CA

CHALLENGES

Custom code in Salesforce became increasingly difficult to manage as Zoom grew and routing rules became more complex.

Changes also required developer resources, which meant the Sales Operations team wasn't able to easily try new lead management initiatives or fine tune processes.

Zoom needed a lead management solution that could help the company scale quickly to keep up with its rapid growth.

SOLUTIONS

LeanData Matching automatically matches leads to existing accounts with the industry's leading fuzzy matching algorithm.

LeanData Routing increases efficiencies and accelerates response time by enabling custom routing rules and facilitating the speedy delivery of leads to the right reps at the right time.

RESULTS

Speed: Leads are getting routed to the right reps more quickly than ever before.

Agility: Changes that used to take months now take one week or less to implement.

Scalability: LeanData enabled Zoom to manage unexpected, explosive lead volume from around the world as businesses, schools, and individuals struggled to stay connected during COVID-19.

“Now that we have LeanData, we can make changes in a week that would’ve taken us months previously. We’re much more flexible, we can move faster, and we can adapt to market conditions.”

Michael Fedynyshyn, Senior Manager, Sales Operations and Strategy at Zoom

Meanwhile, COVID-19 hadn’t been declared a pandemic yet, but the situation was evolving quickly. “We were starting to see our meeting volumes increase and we needed to move fast. LeanData was very accommodating of our schedule,” Fedynyshyn said.

Zoom deployed the software on March 4, right when offices around the globe started to work from home and people were looking for and using Zoom more than ever. “The implementation happened at a perfect time. LeanData worked around the clock to deploy certain system changes for us. It was amazing,” Torres said.

Intuitive, scalable routing and matching

Zoom uses LeanData for lead matching and routing, and the software has made both processes faster and more accurate. LeanData has opened up opportunities within the Sales Operations team to formalize processes that they weren’t able to before, which has helped Zoom’s entire sales function mature and scale.

For example, the company can now set up and change lead assignment rules with ease, as well as take sales reps out of the queue and replace them seamlessly. Prior to LeanData, this process was time-consuming, but LeanData’s software scales with Zoom as the business grows.

“Our sales team is growing rapidly, so being able to come up with assignment rules for new reps so that they can get leads immediately is crucial,” Fedynyshyn said. “We can’t wait a month or two to put a rep into the queue—we’ve got to insert them immediately upon hire.”

LeanData also helps with lead routing for products such as Zoom Rooms and Zoom Phone. Leads for these products can now be routed to specialized overlay reps instead of the account executives whose plates are already full with leads for Zoom’s Meetings product.

In addition, LeanData’s drag-and-drop FlowBuilder makes the lead routing process a breeze. “I remember how impressed I was with FlowBuilder,” Torres said. “I took a screenshot of it and shared it with my team because it was just so straightforward.”

Reporting is another benefit LeanData offers Zoom that the company didn’t have before.

“Now, we can track where a lead actually went and why, which has made troubleshooting infinitely easier,” Torres said.

Outstanding customer service

LeanData’s level of expertise and quick response times were crucial elements in the success of the product rollout at Zoom.

“I felt like the LeanData team was an extension of Zoom itself, because usually when you purchase a vendor product, they give you an hour of onboarding. With LeanData, it was very hands-on, which was hugely important,” Torres said.

The ability for Zoom’s staff to get [LeanData Routing Certified](#) was also key. Because LeanData was a new product for the company, the certification built immense confidence within the teams who needed to use the solution. This was a major benefit that many other vendors don’t offer.

A company-wide impact

Zoom has increased collaboration and improved relationships between teams thanks to LeanData. For example, being able to track, report, and troubleshoot has built trust between the Sales and Sales Operations teams because Sales Operations can now pinpoint why issues occur, if they do.

However, the biggest benefits LeanData has offered Zoom are the solution’s flexibility and ability to scale with the speed of Zoom’s business.

“Now that we have LeanData, we can make changes in a week that would’ve taken us months previously. We’re much more flexible and we can move faster and adapt to market conditions,” Fedynyshyn said.

Moving forward, Zoom plans to use LeanData for routing other Salesforce objects such as Accounts. This will enable the company to continue reducing manual routing and assignments.

"I think we'll see more benefits from LeanData as we implement more features over the next several months. It's going to give us the flexibility we need as Zoom continues to scale. Zoom is a different company now than it was at the start of COVID," Fedynyshyn said.

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Caterina Torres, Business Analyst and Team Lead, Sales Data Management at Zoom

As Zoom continues to experience **unprecedented growth**, the confidence, scalability, and agility that LeanData provides the organization will remain integral.

"As our go-to-market approach changes, we'll be able to adapt our lead assignment rules to meet any change in our strategy. I don't know that we had the certainty before LeanData to make that statement. Now from an operational standpoint, we do," Fedynyshyn said.

About Zoom

Zoom Video Communications, Inc. (NASDAQ: ZM) brings teams together to get more done in a frictionless and secure video environment. The company's easy, reliable, and innovative video-first unified communications platform provides video meetings, voice, webinars, and chat across desktops, phones, mobile devices, and conference room systems. Zoom helps enterprises create elevated experiences with leading business app integrations and developer tools to create customized workflows. Founded in 2011, Zoom is headquartered in San Jose, California, with offices around the world. Visit zoom.com and follow [@zoom_us](https://twitter.com/zoom_us).