How to Automate the Entire Lead Processing Lifecycle

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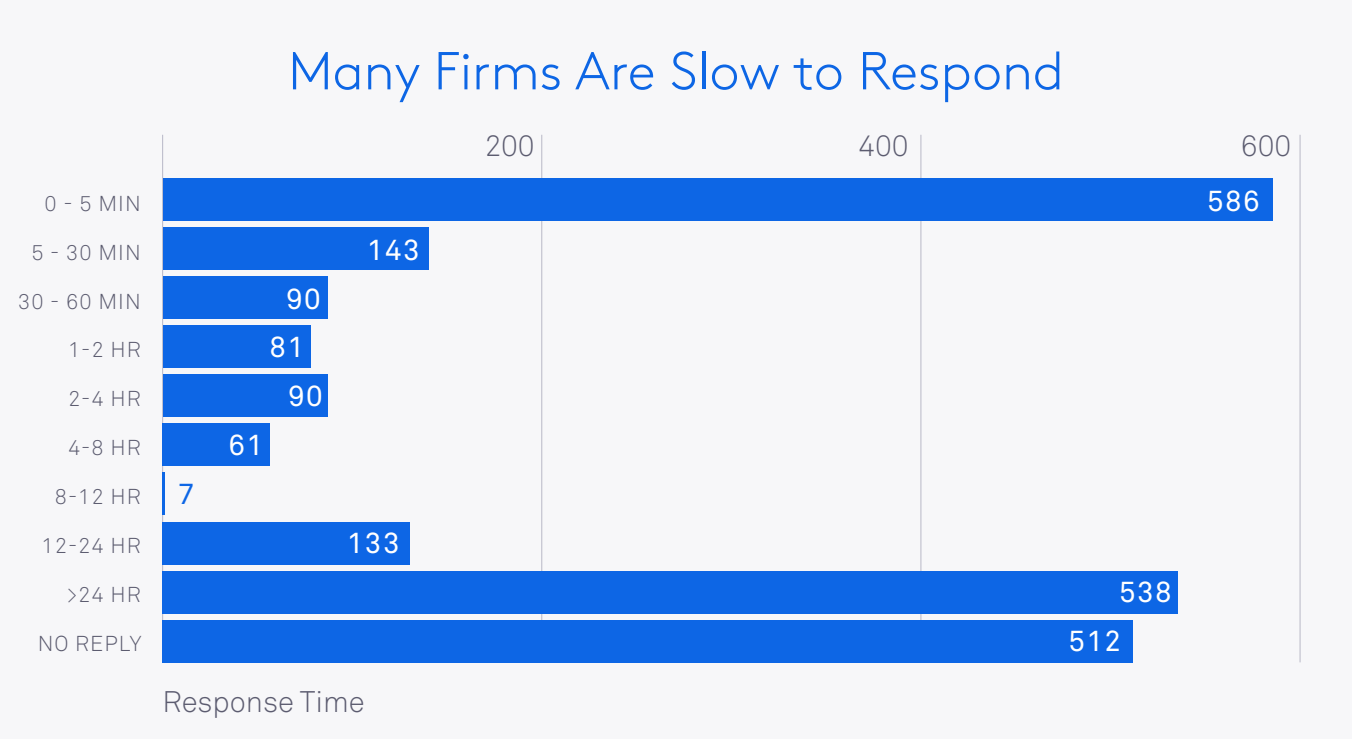
Lead Management: How to Master the Lead Lifecycle

Need to convert more leads? Here's the biggest hidden problem in lead management

Speed. It's one of the most important factors when qualifying and converting more leads and isn't something you solve with more strategic programs or cleverly-designed campaigns. Specifically, how quickly you follow-up with leads after your first touch. Up to 50% of all prospects will choose the vendor that responds first[1]. Following up within an hour makes marketers 7x more likely to qualify leads - that is, to have "a meaningful conversation with a key decision maker."[2] (In comparison, the average response time for all leads is 42 hours[3]):

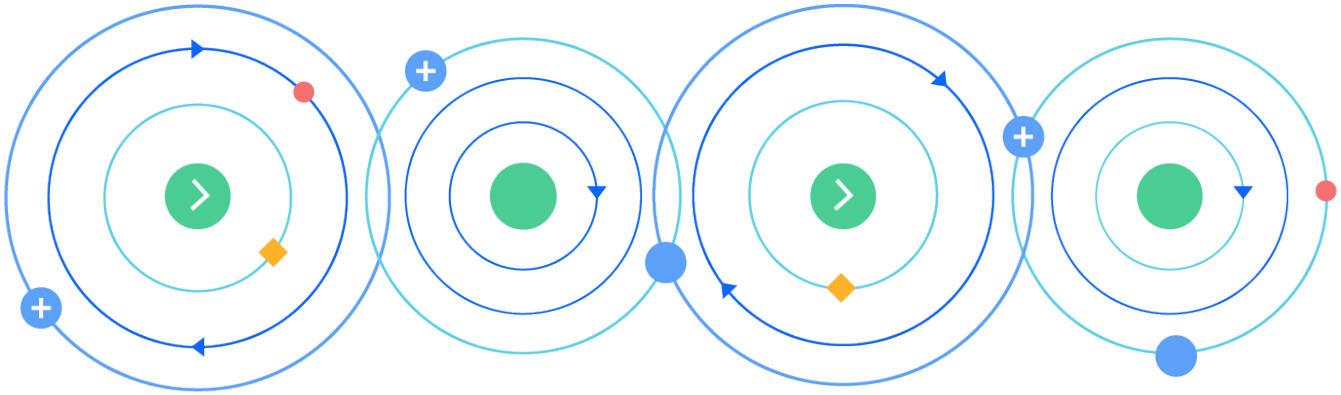


Not all firms respond quickly enough to leads

[1] Fronetics, "50% of sales go to the vendor that responds first," https://www.fronetics.com/50-of-sales-go-to-the-vendor-that-responds-first/

[2] Harvard Business Review, "The Short Life of Online Sales Leads," https://hbr.org/2011/03/the-short-life-of-online-sales-leads

[3] Drift, "The Drift Lead Response Report," https://www.drift.com/blog/lead-response-report-2018/



What causes breakdowns in the lead processing lifecycle?

Here are three of the most prominent challenges that prevent sales from following up with leads fast enough.

Siloed data. A recent survey of 400 executives found that 87% of companies feel their data is siloed among different sources[4] - locked up in various applications or databases with no way to take action on it. This is frequently the case for marketers, whose lead and customer data locked up in their MAP isn't necessarily synced with data in their CRM, outbound solution, or elsewhere. Not having unified, synced data leads to constant lead management headaches, including duplicate lead lists that incorrectly inflate lead counts, routing leads at the wrong stage to the wrong destination, or accidentally continuing to contact leads that have opted out.

Poor integrations. One of the most common causes of data silos is a lack of robust integrations - connections among software apps at the API level - among marketers' tech stacks. While some surveys find that 97% of marketers believe tech integrations are important for growth[5], others show that only about half are doing anything about it[6]. Here's the problem: your most important marketing applications probably aren't seamlessly integrated to the customized use cases you need for your organization. This means your most important lead data remains locked up within each of your apps. Without robust integrations, none of your individual apps can provide important insights on the full picture of how your leads engaged with you...and the best way to follow up.

Process breakdowns. Sales professionals often spend at least an hour on manual data entry daily. How much time are you spending on manual processes daily, such as vetting lead spreadsheets, or copy-pasting lead data from one source to another? Manual lead management processes cause many challenges, like introducing human error, not to mention eating up tons of time, which means your response time gets longer and makes you significantly less likely to convert.

So how can marketers tackle these challenges without resorting to time-consuming, error-prone manual work?

[4] Forbes, "New Forbes Insights Report Shows Organizations Feel Customer Data is Siloed and Exclusionary," https://www.forbes.com/sites/forbespr/2018/06/20/new-forbes-insights-report-shows-organizations-feel-customer-data-is-siloed-and-exclusionary/

[5] eConsultancy, "Why data integration is vital for marketers trying to achieve a single customer view," https://econsultancy.com/why-data-integration-is-vital-for-marketers-trying-to-achieve-a-single-customer-view/

[6] eMarketer, "Most Marketers Are Integrating Data Across Their Tech Stacks," https://www.emarketer.com/content/most-marketers-are-integrating-data-across-their-tech-stacks

The Key Technology to Automating the Lead Processing Lifecycle

Solving lead management challenges with low-code automation

Thankfully, there's a better way to solve lead management challenges and plug up leaks in your marketing funnel. (Without committing more hours to mind-numbing manual spreadsheet work.)

Go-to-Market leaders from around the world are using modern low-code automation platforms like Tray.io to unsilo their data, deeply integrate their marketing and sales apps, and automate key processes to cut out the manual errors and move faster. They have these capabilities:

Full API integration. Low-code automation platforms can connect any cloud-based app (including MAP, CRM, outbound, webinar, database, project management, and many others) at the API integration level. APIs are the fastest, most efficient way that cloud-based software communicates with other software, and the best automation platforms deeply connect applications to flow data even from highly customized instances.

Sophisticated automation. It's important to automate processes among multiple cloud apps, such as setting a process to automatically update lead information and trigger appropriate campaigns in CRM, outbound email automation, and other apps whenever leads engage with your campaigns or website. The best automation platforms have flexible logical operators such as if/then conditionals, looping, and branching that help you build sophisticated, multi-step workflows to do exactly what you need with your leads.

Ease of use. Another important feature to look for is a completely visual, user-friendly builder. One that lets anyone - not just engineers - easily build workflows to process and upload lead lists, route enriched leads to the right owners, and execute customized follow-up - faster, without errors, and without having to code.

Scalability. The best solutions scale with your team's data usage and needs, and are built to help you collaborate with your team, not bottleneck your progress by limiting access to individual connectors or individual users.

Let's explore how this new technology is already helping marketers successfully automate important lead management processes.

Lead List Uploads: Kick off the Lead Processing Lifecycle Faster

Why automate lead list uploads? Speed, efficiency, and reliable lead data.

As we now know, the speed of lead follow-up is one of the most important factors in driving more conversions. And in the lead lifecycle that begins after capture and includes lead enrichment, lead-to-account matching, and lead routing, uploading lead lists is the very first step in the process. Until your leads are actually ingested into your marketing stack, you can't enrich them, segment them, or route them to sales.

If you are manually formatting, de-duplicating, collating, and uploading your lead lists, there's a good chance the people on your marketing team responsible for the process aren't very happy about it.

Edit Field Mapping: Leads

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header
Change	Name	Full Name
Change	First Name	First Name
Change	Last Name	Last Name
Change	Salutation	Salutation
Change	Title	Title
Change	Email	Email
Change	Company	Company
Change	Website	Website
Change	Annual Revenue	Annual Revenue
Change	Industry	Industry
Change	No. of Employees	No. of Employees

You've probably seen this screen before. It's probably not a welcome sight. We're sorry.

However, since marketing teams are always on the hunt for new leads, most teams source their leads from multiple channels, including email, social (paid and unpaid), search (again, paid and unpaid), events, webinars, and many others. The process never ends, and it often means painstaking manual work double-checking and vetting lead data spreadsheets.

Some estimates suggest that companies spend upwards of 40 hours per month processing leads for upload[7]. As we mentioned earlier, letting leads sit for as little as one hour makes you 7x less likely to ever speak with a decision maker, and puts your sales team that much farther from turning any of those costly leads into actual closed-won deals.

What if you could automatically complete every step of this process in minutes, not hours?

[7] Business2Community, "13 Demand Generation Statistics That Will Blow Your Mind," https://www.business2community.com/marketing/13-demand-generation-statistics-will-blow-mind-01968522

How to automatically ingest lead lists into your stack

As we've covered, the biggest barriers between you and error-free lead list uploads are:

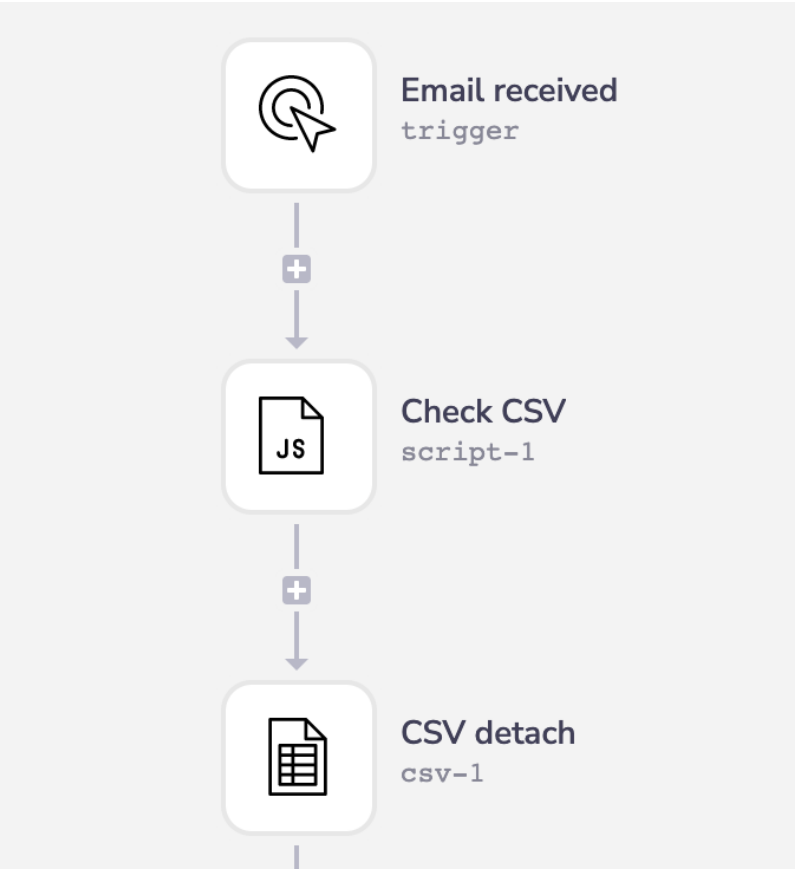
- Data issues (errors, formatting, etc.)
- No robust integrations to sync data across apps, error-free
- Manual spreadsheet wrangling
- Repetitive field mapping

A low-code automation platform is built specifically to integrate cloud-based applications like your MAP, CRM, outbound email automation, and others. They can also automate the entire process to take place whenever you need, such as an instant response to any incoming lead, or to process in batches on a regular schedule. The best ones also have advanced helpers to seamlessly sync, cleanse, and flow data, and can even accept lead lists in a variety of different ways, such as via FTP, webhooks, or even submitting them via email (as we'll cover in our example below).

Let's go over exactly how to automate lead list uploads using a low-code automation platform.

Part I: Automating Lead List Uploads

Here's the first leg of an automated workflow automates the lead upload process.



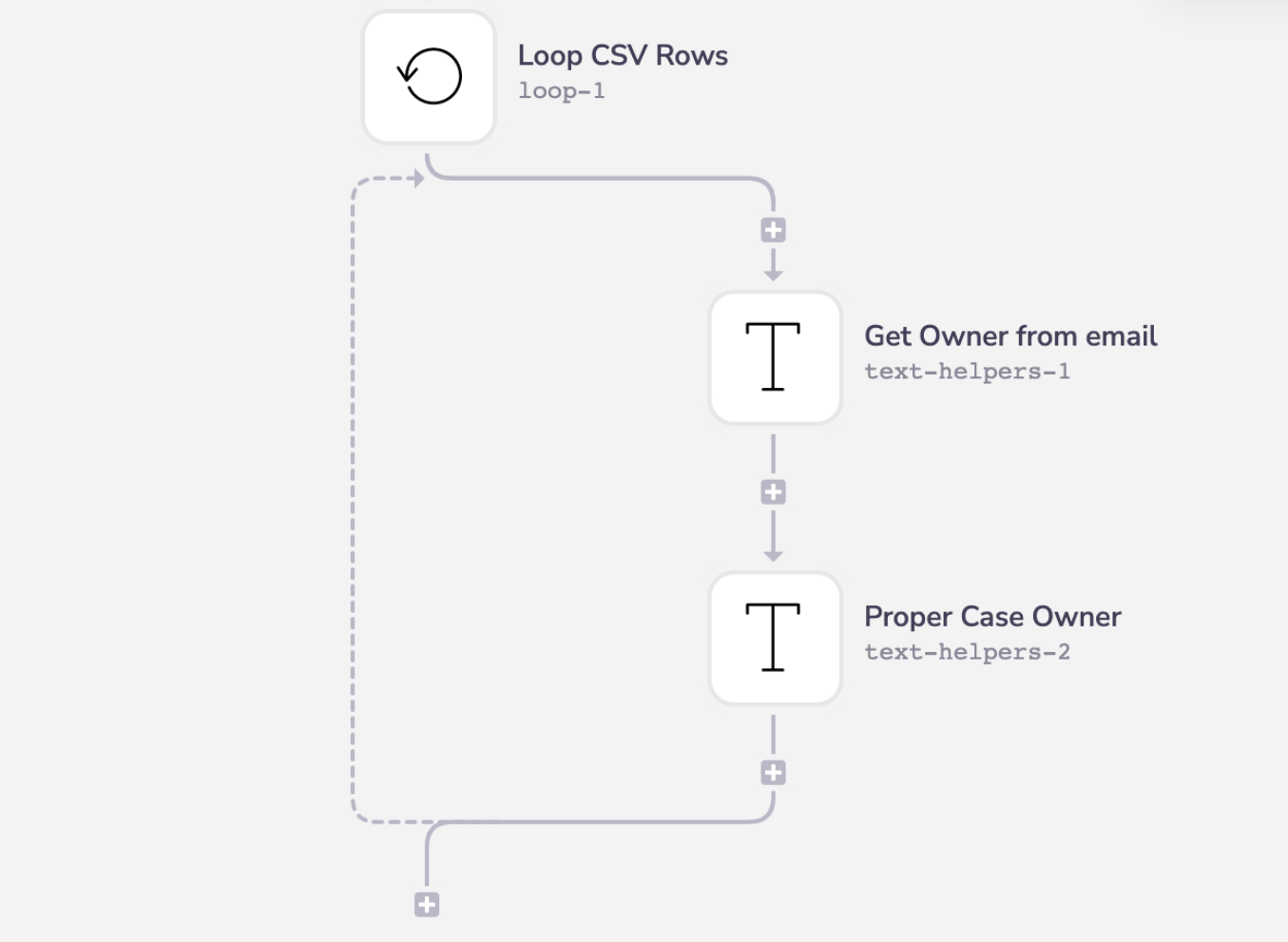
- **Email trigger:** The process starts with an email trigger whenever someone emails a new lead list in CSV format to an email address specific to this workflow. The sender could be a member of the sales team uploading the spreadsheet from their badge scans after an eventful day at a conference, a marketing operations manager pulling No robust integrations to sync data across apps, error-free

- **Check CSV:** This step uses an automation helper to verify that lead data is properly formatted for upload.

- **CSV Processor:** This step uses an advanced helper that processes CSV files. Since each lead in the CSV will have its own row with information including first name, last name, email address, and other details, the helper begins the process of pulling the lead data, row-by-row, from the submitted spreadsheet.

Part II: Loading in leads row-by-row

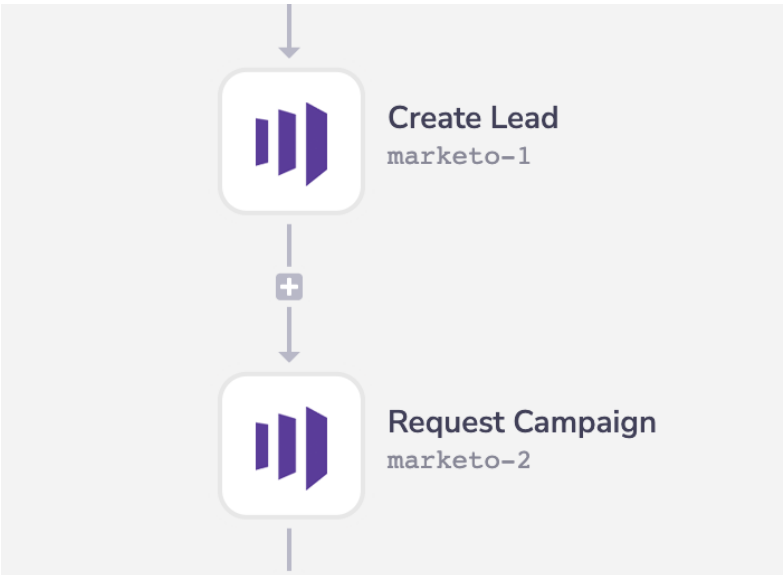
The next part of our automated workflow loads in lead data stored in our CSV file row-by-row.



- **Loop helper:** The loop helper iteratively runs through repeated processes until they're complete. In this case, it uploads row after row of leads from the submitted CSV file.
- **Text helper(s):** The last two steps here are text helpers that verify and properly format the lead owner field.

Part III: Creating leads and triggering follow-up campaigns

The final part of our journey creates the uploaded leads within our MarTech stack and begins the follow-up process.



- **Create lead:** This workflow step creates a new lead record in the marketing platform (in this case, Marketo).
- **Request campaign:** Finally, the workflow triggers appropriate campaign follow-up within Marketo.

> *This workflow runs within minutes and lets us take in lead lists from any source and rapidly upload them into our system to create new lead records for follow-up. Read how sales engagement leader Outreach automates lead list uploads to save hundreds of hours per year.*

Lead Enrichment: Complete Lead Data for Faster Follow-Up

The key to clean, reliable data that means more wins.

Lead enrichment is another important step in the lead management process across the full marketing lifecycle for leads. If you've ever reviewed a list of your company's leads after a campaign, you've probably seen the telltale gaps in lead details - first name, last name, company name, phone number, company size, address, or any other fields you need to qualify and route leads according to your business priorities/rules.

You can't just ignore those incomplete or unenriched leads. They cost your business time and money to capture. And they could still become high-value opportunities. But you can't act on them if they're missing important data. To make matters more challenging, anywhere from 20-25% of your contact database decays every year[8]. Why? People who have engaged with your company may change jobs. Their company may move. And so on. Not having fully-formed lead data can slow, if not completely halt, your ability to follow up with valuable leads. (This is part of the reason bad data costs companies an estimated $3 trillion annually in the US.[9])

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8 HubSpot, "Database Decay Simulation," https://www.hubspot.com/database-decay

9 Harvard Business Review, "Bad Data Costs the U.S. $3 Trillion Per Year," https://hbr.org/2016/09/bad-data-costs-the-u-s-3-trillion-per-year

Your options: Use lead enrichment solutions and/or manual data enrichment

Trying to manually enrich your own leads yourself isn't practical. It's a time-consuming process that would require you to play detective, scouring company websites, Google, and individual LinkedIn and social media profiles.

That's why it's common for marketers to look for external help. There are, of course, two primary options:

- **Lead enrichment solutions:** Excellent tools such as Clearbit, Datafox, DiscoverOrg, and D&B Optimizer use sophisticated software to tackle this problem, matching leads based on email domain, company name, and other information. Research suggests that 90% of companies use at least two different enrichment providers[10] since each vendor has a unique dataset.

- **Manual lead enrichment:** Another common practice for marketers is to utilize a manual lead enrichment service, paying human researchers around the globe to fill in the gaps that your enrichment solutions couldn't match.[11]

So, getting your incomplete leads enriched tends to be a matter of using a lead enrichment solution, manual lead enrichment, or both. Seems simple enough.

But lead enrichment poses another challenge that isn't as easy to deal with.

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10 TOPO Blog, "Sales Development Technology: The Stack Emerges," https://blog.topohq.com/sales-development-technology-the-stack-emerges/

11 Tray.io Blog, "How to Speed Up Manual Lead Enrichment with Automation," https://tray.io/blog/automate-manual-lead-enrichment trillion-per-year

How to flow enriched lead data to the rest of your stack

There's still the matter of getting those enriched leads back out to the rest of your marketing and revenue apps.

You need to flow those enriched leads into your marketing automation platform (MAP) for follow-up campaigns into your CRM for sales record-keeping, to your messaging platform to ensure customer conversations are based on up-to-date data, and to many other destinations within your tech stack.

Traditionally, there have only been two ways to get them there:

- **Native integrations.** Most enrichment tools have *native* integrations - pre-built, out-of-the-box connections - to popular software apps. While these can be useful, they often lack the custom functionality you need for tasks specific to your business, like mapping data to custom fields. Also, there probably won't be native integrations for all the apps in your stack. Which means you're left with...

- **Manual work.** If you don't have a customized integration from your enrichment tool to every other app that needs enriched leads, you're looking at a much less fun alternative. That's right, manually importing spreadsheets, a time-consuming and error-prone process. And as we mentioned in our earlier article about lead management, taking longer to follow up with leads drastically reduces your chances to convert them.

How to automate the flow of enriched data into your stack

To review, the challenges that stand between you and getting enriched leads into the rest of your stack are:

- Potential lack of native integrations from your system of record (CRM, MAP)
- Potential lack of native integrations among all your additional apps
- Lack of support for your custom business needs, such as custom field mapping

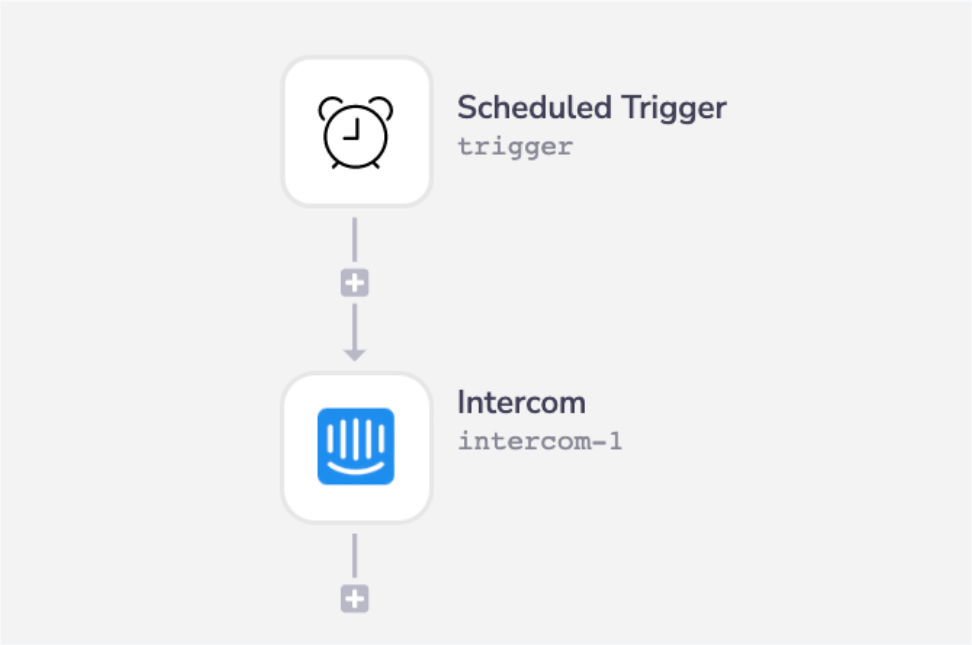
Modern low-code automation platforms are built to solve these problems and flow data, like enriched leads, freely among your CRM, MAP, and other applications. They can even, as in the example below, flow this lead data out to different marketing channels, such as chat messaging, to ensure you have an engaging, personalized experience the next time your prospects visit you.

Example use case: Enriching Intercom users in bulk with Clearbit

The messaging platform Intercom is handy for interacting immediately with both customers and prospects. But all customer messaging is most effective when you're working from refreshed, enriched data that's up to date. With a modern low-code automation platform like Tray.io, it's possible to pull in a list of all people you've engaged with in Intercom, enrich their lead data as needed, then update leads in Intercom to ensure your lead data is in sync even within your messaging platform. Here's how.

Part I: Inventory of messaging platform users

Here's the first part of an automated workflow that automates the syncing of enriched leads to a messaging platform, in this case, Intercom.

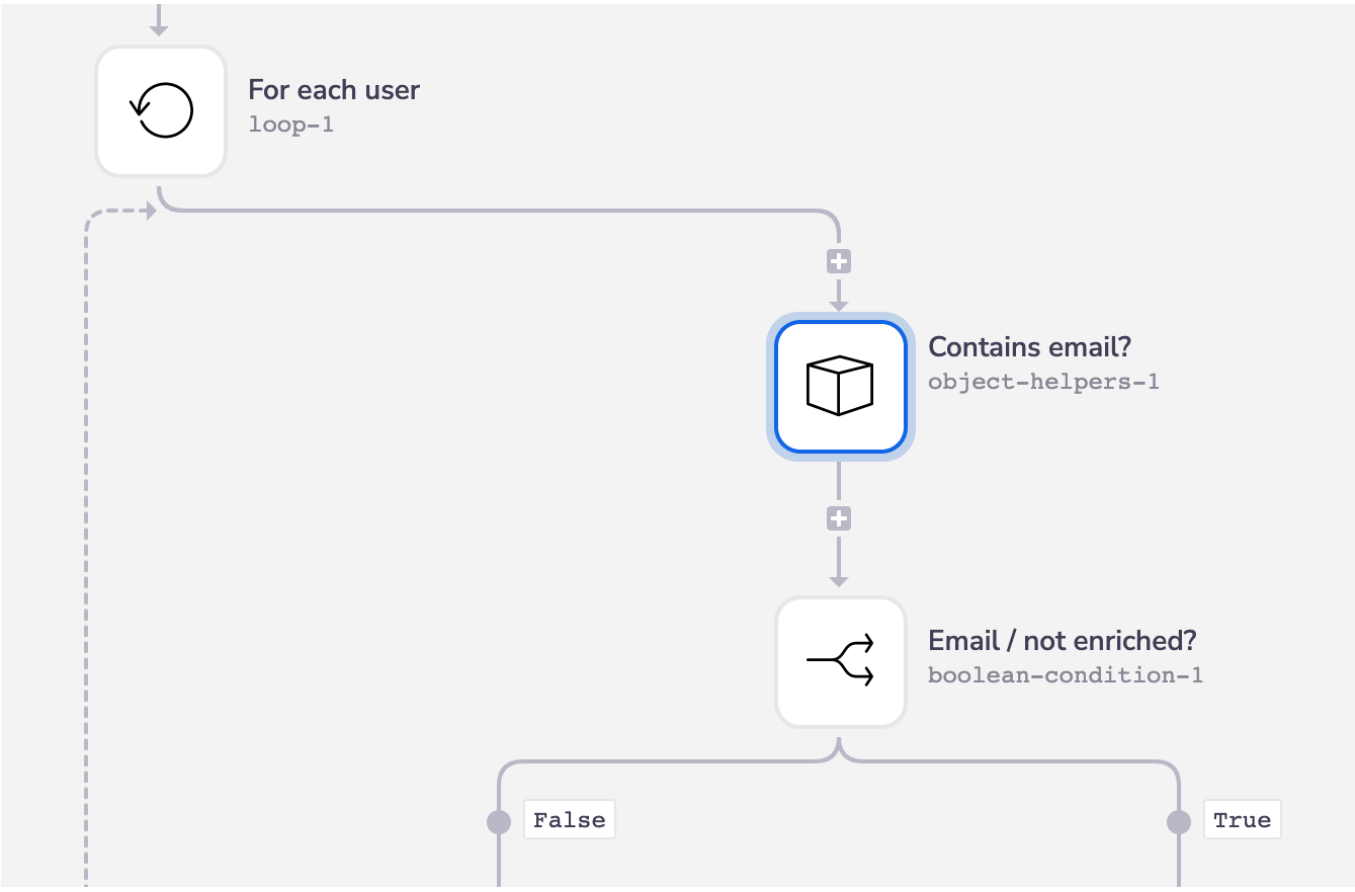


- **Scheduled Trigger:** The process starts with a scheduled trigger to kick off the initial steps to pull all existing Intercom leads for enrichment. (A scheduled trigger can run on a monthly, weekly, daily, or hourly basis.) You could also run this manually.

- **Intercom - count users:** The next operation reaches into the integrated Intercom instance and pulls up a list of the total number of all leads in Intercom.

Part II: Confirming enrichment status

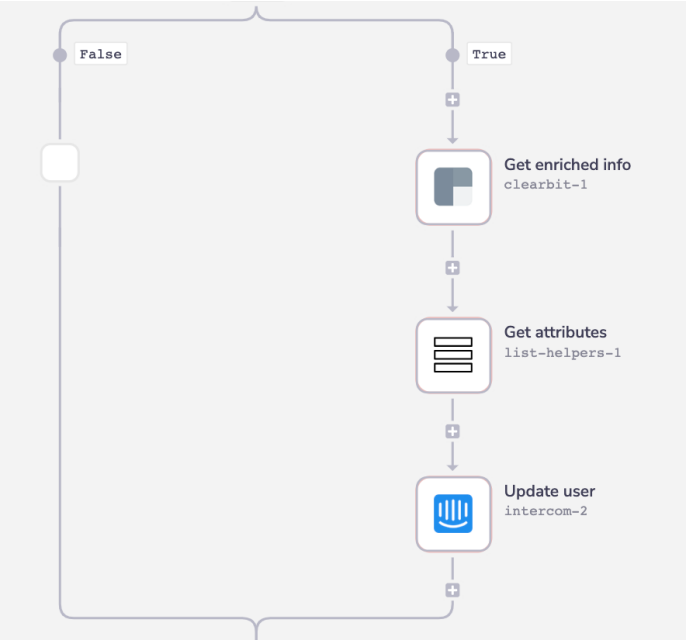
The second part of this automated workflow pulls up the leads from Intercom and ascertains whether they've already been enriched.



- **Intercom - list users:** This operation pulls up the full list of leads currently in Intercom.
- **Loop helper:** This loop helper iteratively checks each user that this automated workflow has found in Intercom for updated, enriched info.
- **Object helper:** This step ascertains whether the lead contains email and other enrichment information.
- **Boolean if/then helper:** This step then starts a follow-up loop for Intercom leads that are, in fact, missing lead data. If the loop ascertains that a lead is missing data, it passes that lead to the next step to be enriched. (If the lead is already enriched, the process more or less ends here.)

Part III: Enrich leads with Clearbit and update within Intercom

The final leg of our automated workflow enriches any leads that need it, then updates the enriched leads in Intercom.



- **Clearbit - Get enrichment info:** For any leads found to be "true" (not enriched), the workflow pulls up all relevant company info (including company, location, company website URL, and any missing contact information) to append as needed.
- **Get attributes:** This helper compares the missing attributes between the previous lead info in Intercom and the enriched data available in Clearbit and fills in the gaps.
- **Intercom - update user:** The final step in this process then flows any updated leads directly into Intercom to update them within the Intercom instance.

> *You can create and run workflows like this in minutes, rapidly enriching and syncing all Intercom leads on the spot. Read how GitHub integrates Clearbit with Eloqua for lead enrichment and de-duping for thousands of leads to save hours of manual work.*

Lead-to-Account Matching: Segmentation and Smarketing

Productive sales efforts vs. dead ends.

Lead-to-account matching is a subtle but important way to tighten sales and marketing alignment and increase sales productivity, as well as a key component of account-based marketing (ABM). Lead-to-account matching is easy to define: An automated process that matches (and filters out) any incoming leads to existing accounts. It prevents your sales team from actively prospecting leads that are already part of accounts that are either already part of active opportunities or are already customers. Sadly, this functionality is typically limited in most cases, particularly within standard marketing automation platforms (MAPs) and other broad marketing solutions that offer no customization or flexibility.

Sales professionals pitching to existing accounts is obviously an embarrassing mistake that leads to confused prospects or customers who might reply, "yes, we already know your company and are talking to [Some Other Person At Your Company]." There are several issues that might cause this problem: "new" leads might appear that actually roll up to an active opportunity that belongs to a different sales team member; partner-targeted leads that should belong to your company's partner channel erroneously end up in front of sales; leads from target account lists from ABM or outbound campaigns also erroneously end up in the wrong place; and in some cases, leads might be duplicates.

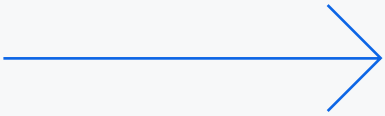
Prospecting the wrong accounts takes up hours your sales team could've spent pursuing net-new opportunities (or legitimate account expansion opps). A past HubSpot survey suggests that although the top sales priority for 75% of companies is still, predictably, closing more deals, 48% of companies are concerned with improving the efficiency of the sales funnel. This includes making sure the leads your sales team receives aren't dead ends, or that they don't end up with the wrong person, causing high-value opportunities to stall.

These problems are costly at the enterprise level, where deals frequently involve a committee of 6-7 decision-makers[12], which means an increasingly higher likelihood of losing deals with longer delays. Delays can also significantly change the impact of your marketing budget on sales pipeline and marketing return on investment (ROI), as well as on sales productivity.

Why sales productivity matters: Minimize data issues, maximize prospecting

You probably don't need an explanation on why your sales team's time is valuable. Your sales team would ideally prefer to focus 100% of their time on prospecting and closing deals. Data errors, like accidentally prospecting leads that are already in pipeline, waste the limited time of sales reps, who are already struggling with other time-consuming processes that eat up their prospecting hours. In fact, according to a past HubSpot survey, 35% of surveyed sales reps typically spend about an hour a day on data entry, rather than actually selling. (Another 27% spend upwards of one to two hours or more.)

So how can you solve this problem?



12 Harvard Business Review, "The New Sales Imperative," https://hbr.org/2017/03/the-new-sales-imperative

The past: Use a lead-to-account matching tool, or try your luck at manual matching

Unfortunately, up until very recently, there weren't many options to tackle this problem.

- **Use a lead-to-account-matching tool:** While there are some tools out there that can handle the task of lead-to-account matching, they sadly can't handle all the other data-related tasks that not only cost sales teams thousands of hours every year, but also cause expensive delays in getting leads to sales in the first place, such as lead enrichment and lead routing. In other words, an out-of-the-box lead-to-account matching tool might solve one piece of the puzzle, but it won't solve the larger problem of sales reps wasting hours wrangling data. They also lack native integrations to continue the lead processing lifecycle process once matching is complete.

- **Try to handle the problem manually:** You could certainly ask your sales reps to be more conscientious about confirming new leads against existing accounts. But you know their job isn't to dig through account structures to verify every new lead. And they know that 50% of sales go to the vendor that responds first.

How to build custom CRM integrations to automate lead-to-account matching

Again, the biggest problems that arise in managing lead-to-account matching are:

- Point solutions might handle matching well, but can't do much else
- Lack of native integrations to other apps leads to delays before and after matching
- Manually digging through accounts slows sales follow-up and jeopardizes deals
- Hours of wasted time your sales team could've spent winning deals

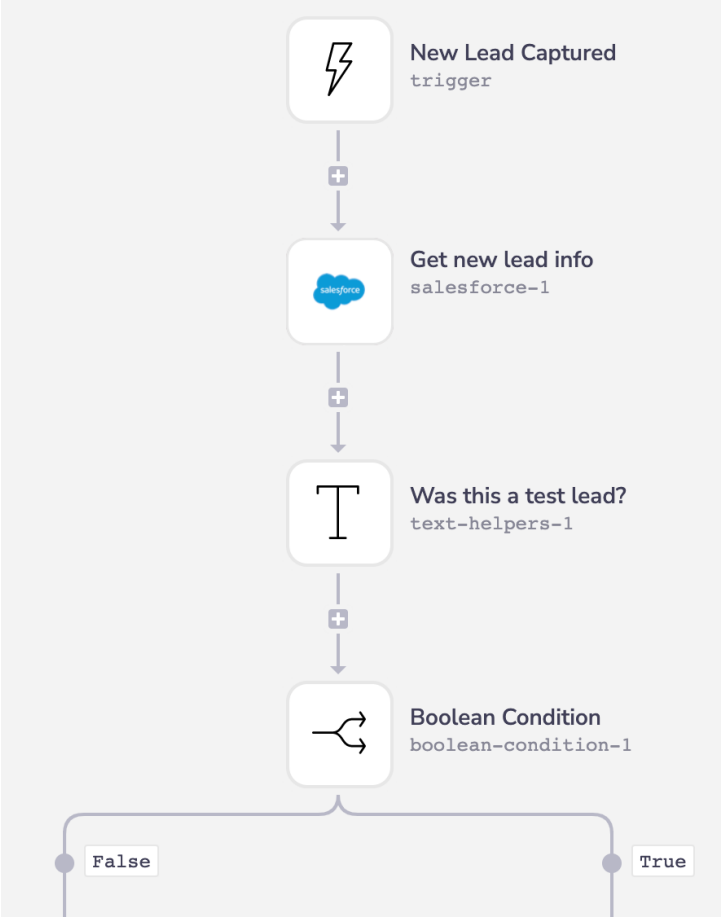
A modern low-code automation platform solves these problems by offering robust integrations with any cloud-based app, and the ability to automate processes like lead-to-account matching, enrichment, uploads, and others. Let's walk through an example of automating lead-to-account matching in Salesforce, complete with options for fuzzy name matching and filtering out probable spam emails.

Example use case: Lead-to-account matching within Salesforce

Most companies use a CRM such as Salesforce, Microsoft Dynamics, Sugar, or Oracle CX as a system-of-record to store lead and account info and record sales stages. Unfortunately, many marketing and sales teams find themselves spending far too much time popping in and out of their CRM instance to manually update lead and account info as part of non-revenue processes, like verifying whether a seemingly "new" lead is already part of an existing account. Using an automation platform like Tray.io, you can automate lead-to-account matching and never waste your sales teams' time (or get confused customer emails) again.

Part I: Identify new leads on demand

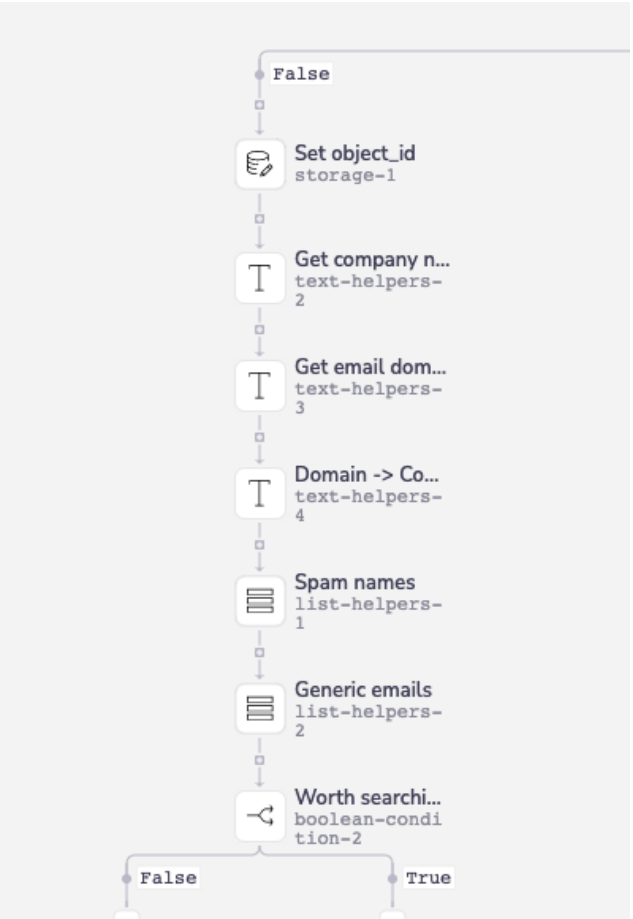
The first leg of an automated workflow that automates lead-to-account matching starts with an on-demand trigger that begins the process as soon as a new lead comes in:



- **New Lead Captured:** The process starts with a trigger that begins whenever a new lead is captured in the MAP (e.g. Marketo, Eloqua, or HubSpot).
- **Salesforce:** Get New Lead Info: Next, the workflow pulls up the lead's information in the CRM, in this case, Salesforce.
- **Text helper:** Was This a Test Lead?: This step uses a quick, 100% code-free text query to check whether this lead was a test run by the marketing team.
- **Boolean If/Then:** If the lead was a test, the workflow stops here. However, if this was not a test lead, the workflow proceeds to the next leg.

Part II: Compile basic lead info and confirm follow-up value

The second section of this automated workflow confirms the lead contains a legitimate email and begins a test to see whether it's worth trying to match it against our CRM's existing account list.



- **Data Helper:** Set Lead ID: This step uses a data helper to temporarily store and compile lead info to be queried by the rest of the workflow in the following steps.

- **Text Helpers:** Company Name / Email Domain / Domain -> Company: These text helpers split and parse the contact info of the lead to check these values against existing values in the CRM.

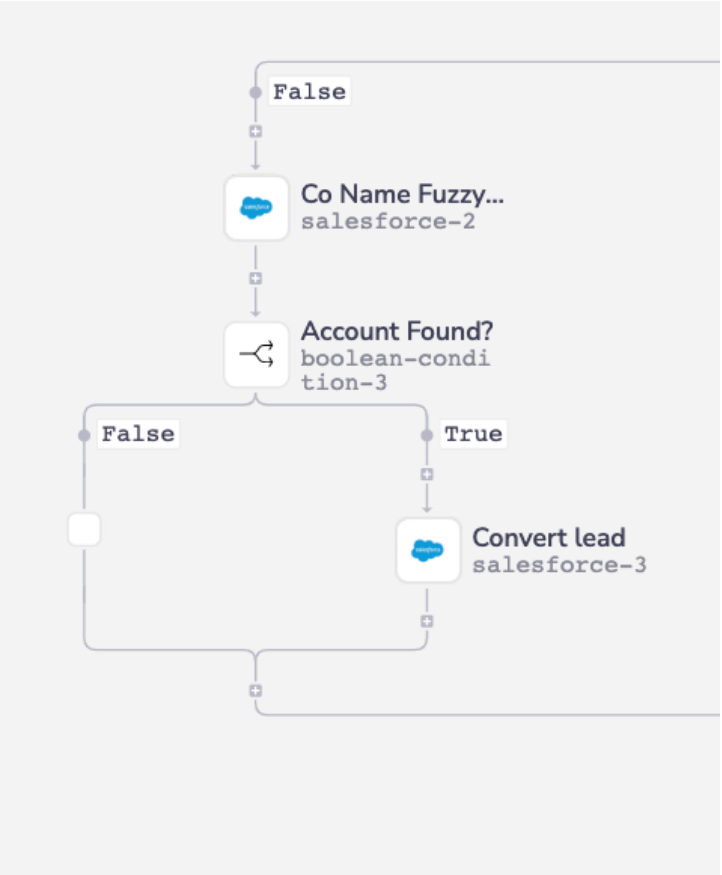
Part II: Compile basic lead info and confirm follow-up value, continued

- **List Helpers:** Spam Names / Generic Emails: These list-based helpers then quickly screen the lead's contact information to determine whether it includes any common spam email strings (like "test@gmail.com") or personal email domains, which will determine if the workflow can use the email domain to check for a match or not.

- **Boolean If/Then:** If the lead was a test, the workflow stops here. However, if this was not a test lead, the workflow proceeds to the next leg.

Part III: Convert leads that belong to existing accounts based on company name matching

The "false" leg of the previous Boolean loop uses the company name only (not the email domain which it found to be "not worth searching") to check if the lead matches to existing accounts and if so, to convert them to a Contact on that Account.



- **Salesforce:** Company Name Fuzzy Match: This step performs a fuzzy match of the lead's company name against existing account names.
- **Boolean If/Then - Account Found?:** This true/false Boolean step checks to see if a match was found. If it was, the next step will convert the lead. Otherwise, it will do nothing.

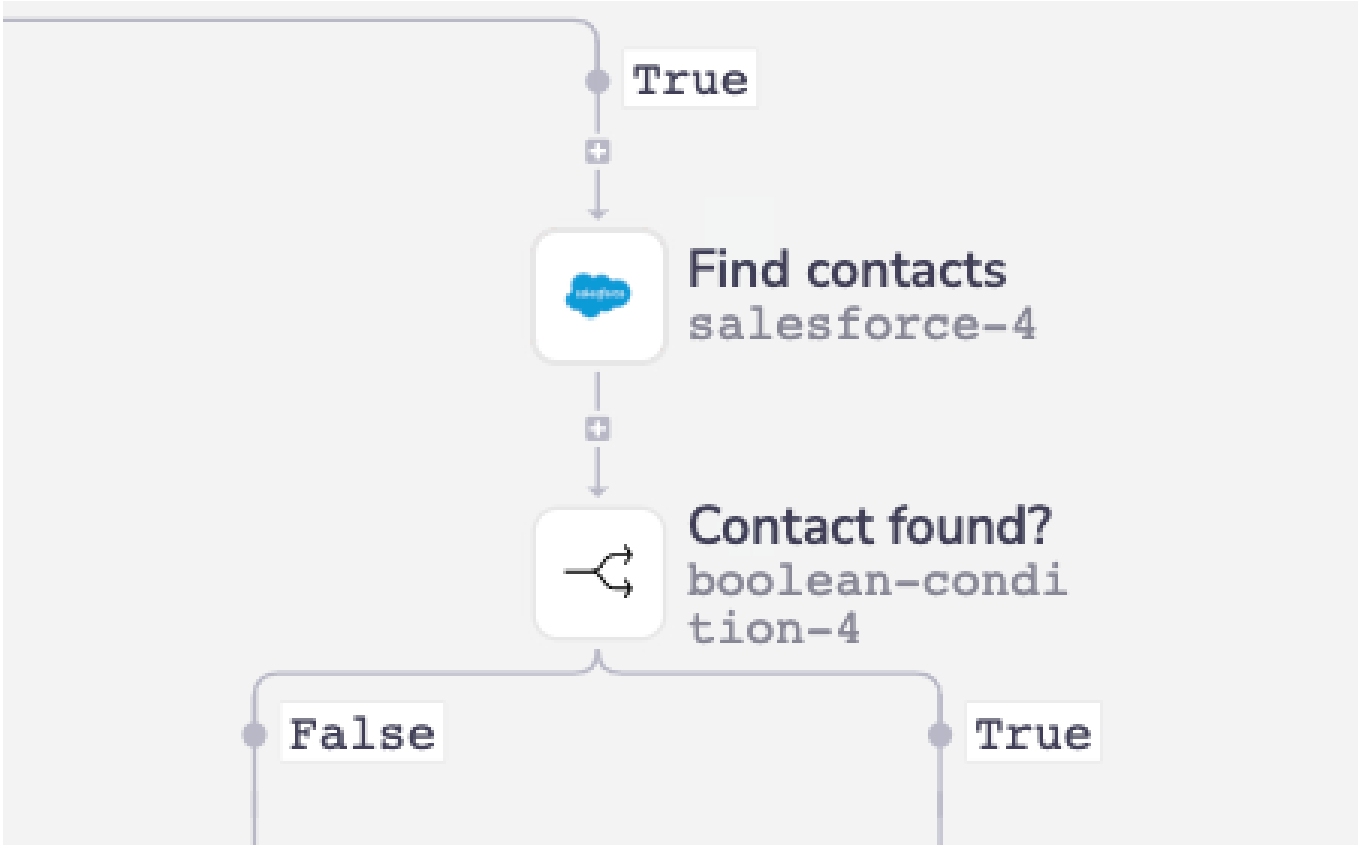
Part III: Convert leads that belong to existing accounts based on company name matching, continued

- **Salesforce - Convert Lead:** Finally, if this lead's company name fuzzy-matched to an existing account, this step converts the lead to a Contact on that account.

  NOTE: Again, while the workflow in this example ends at this step, the best automation platforms can set multiple steps or follow-up workflows to sequentially cascade into each other. A common best practice for workflows of this type is to route enriched leads into a lead-to-account matching workflow like this, then trigger a subsequent workflow for lead assignment and routing to sales. Power users might also build in account stage lookup steps that automatically update the lead's status if that particular account has not progressed to further segment leads and ensure they only route leads from active accounts to sales.

Part IV: Determine the best follow-up for leads "worth pursuing"

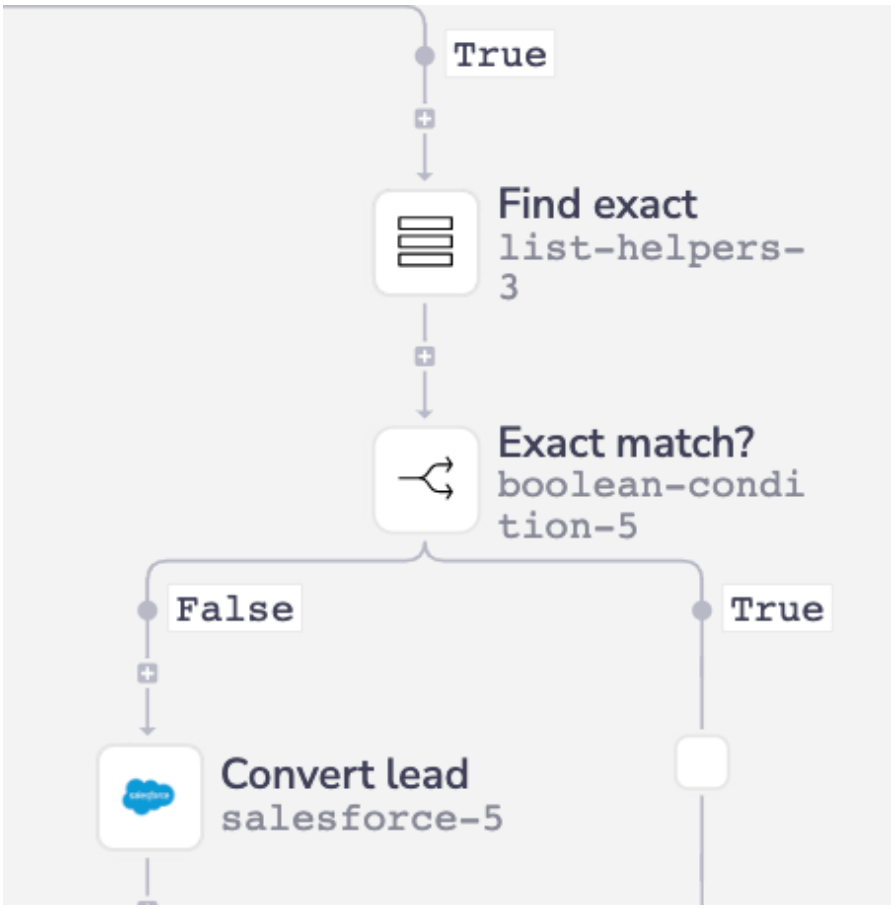
The "false" leg of the previous Boolean takes care of leads that had an email domain we didn't want to use to match to accounts, so we simply used the Company Name field to try to find a match. The "true" leg runs a search in CRM to see whether the contact exists in Salesforce, using the email domain.



- **Salesforce - Find Contacts:** The workflow queries Salesforce to see determine whether the lead's email domain exists on other contacts within the CRM.
- **Boolean If/Then - Contact Found?:** The next step figures out what to do with the lead whether a matching email domain was found, or not.

Part V: Determine whether the lead already exists and close out the process

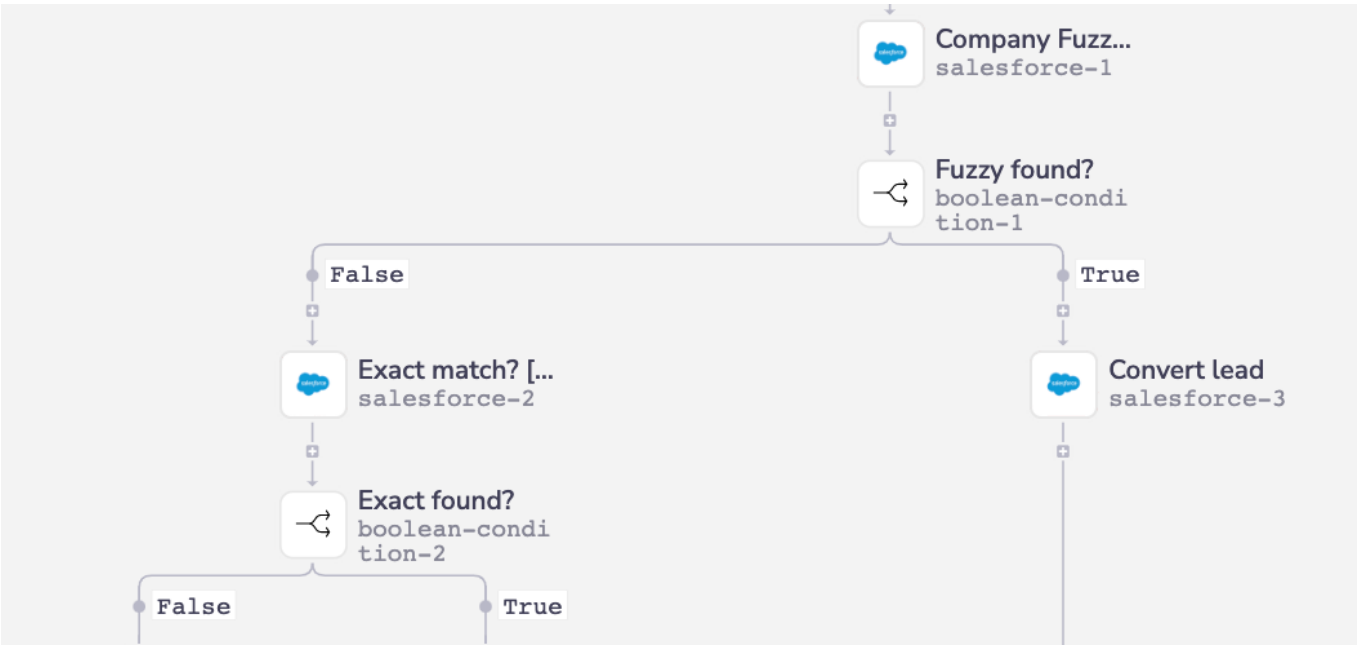
Since the workflow has now determined the lead's email domain does match other contacts in Salesforce, it now needs to determine whether the exact same email address exists already.



- **List Helper - Find Exact:** This operation performs an exact match query against the lead's email address.
- **Boolean If/Then - Exact Match?:** If the condition is determined to be "true" - that is, the exact same email address already exists within CRM as a Contact, then no action is taken. The workflow has determined that the lead is already part of an account and doesn't need to be converted.
- **Salesforce - Convert Lead:** If the Boolean loop determines that this lead does not, in fact, already exist in CRM, it then converts the lead to the matched account.

Part VI: If the lead is "new," take appropriate action and close out the process

The workflow has determined whether the lead is "worth" pursuing based on having a "good" email domain, but it previously needed to figure out whether, via Boolean Loop, it exists in Salesforce. Above, we covered what the workflow does if it does, in fact, find the contact in CRM. In this leg of the workflow, we cover what happens if the lead's email domain is *not* already recorded in CRM:



- **Salesforce - Company Name Fuzzy Match:** As in a previous step, the workflow takes an apparently "new" lead and performs a fuzzy name match to confirm whether the lead's company exists in CRM.

- **Boolean If/Then - Fuzzy Found?:** The workflow then determines which actions to take if there is, in fact, a fuzzy match.

Part VI: If the lead is "new," take appropriate action and close out the process, continued

- **If "True" - Salesforce - Convert Lead:** If the workflow determines there is, in fact, a company match for this new lead, it then calls Salesforce to convert the lead and ends the process here.

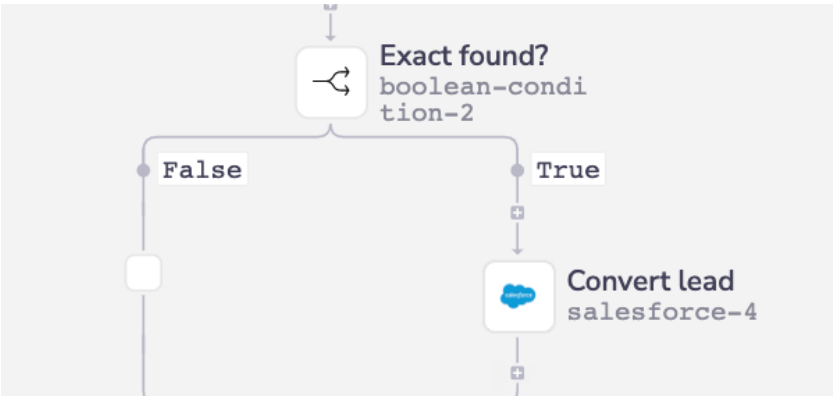
  NOTE: Again, this lead-to-account-matching workflow is just for example. It would be possible to have the next steps after this route the lead to sales.

- **If "False" - Salesforce - Exact Match? [Domain]:** Having failed to make a fuzzy company match for this new lead, it then performs an exact match query in Salesforce.

- **Boolean If/Then - Exact Domain Match Found?:** The workflow then runs another if/then step to determine which action should be taken after running an exact match query for the lead's company in Salesforce.

Part VII: (The End!) Convert if an exact match is found, and close out the process

Since the workflow has already determined that the lead is "worth" pursuing, that it does not already exist within Salesforce, and that its company name does not have a fuzzy match in Salesforce, the workflow closes out the process based on whether the lead's company name has an exact match in Salesforce.



- **Salesforce - Convert Lead:** If, as the result of the previous Boolean loop, the workflow finds an exact match for the lead's company name, it then converts the lead within CRM and closes out the process. If it fails to find an exact match (after having previously failed to also find a fuzzy match), it does nothing, having effectively determined that it's not possible to convert at this time.

  NOTE: Again, while this example lead-to-account matching workflow ends here, using a solution like Tray.io's automation platform, it could easily contain additional steps, or cascade into a different workflow, that then continues the follow-up process, such as routing leads to sales via a round-robin process or divvied up by other business rules like territory assignments.

> *Many rapidly-growing companies and enterprises build automated workflows like this to instantly fuzzy-match and exact-match leads to accounts. Advertising leader AdRoll uses automation to integrate leads from multiple sources, enrich them, and prepare them for sales, driving 13% more sales appointments.*

Lead routing: Getting the right leads to the right people in sales

Lead routing is one of the last parts of the lead management lifecycle. It's also very important, especially as your company, sales team, and lead count scale. Lead routing is the process of sending the right leads, once you're done with lead uploads, lead enrichment, and have properly organized and segmented them (such as by lead-to-account matching), to the right people on your sales team for follow-up.

Lead routing tends to be an automated process based on lead assignment rules set by your operations team. Most commonly, operations teams using CRMs like Salesforce will use Salesforce lead assignment rules they set based on a variety of factors, such as account owner, territory designations, or in some cases, by random draw.

How to route leads: Built-in features vs. point solutions

Not having proper lead routing means leads get assigned in error, or are not re-assigned after having lost a previous owner - in both cases, this means missed opportunities for your business. That means headaches for your operations team as they manually re-assign leads based on territory, account size, product line, or your sales organization's structure. As your company scales and lead volume grows, these delays cost your company real revenue by delaying follow-up and providing a poor sales experience to prospects who got a duplicate call or email...or none at all. In addition, lead assignment handled manually within CRM can eventually become extremely complex as you scale to larger sales teams with more members, more territories, and more custom business rules.

(And once you've routed your leads, you need to kick off the follow-up process, which usually runs through entirely different apps. Unless your follow-up apps for outbound are directly connected to your CRM and can accept a direct flow of routed lead data, you've got more delays and more extra work ahead of you.)

For rapidly-growing firms and enterprises that have thousands (if not millions) of leads to manage, manual routing just isn't feasible. In the past, this often left marketing and sales operations teams with limited options:

CRM built-in lead assignment features: Your CRM often acts as a system of record for sales account information, as well as a strategic home base for planning, forecasting budgets, and assigning sales territories. However, built-in lead routing features tend to be limited, with simple assignment rules that offer little to no customization. CRMs also tend to have limited integrations - the ability to directly connect to and pass data between additional software apps, such as marketing platforms or outbound email sequencing.

Lead routing point solutions: There are some very good lead routing point solutions on the market that focus on this important use case, but sadly, as with CRMs, they frequently offer limited (or no) integrations for the other applications in your stack. Again, this means updating routed leads will require manual work. In addition, as mentioned above, unless your point solutions have direct integrations to other apps like your outbound email solution, you're still stuck with delays.

How to automate lead routing, without the operational headaches

To summarize, the challenges you may be facing with lead routing right now include:

- Limited routing options in your CRM or source of truth
- Limited integrations between your CRM and other revenue apps
- Limited integrations between a lead routing point solution and other apps
- Operational headaches as you manually re-assign improperly-routed leads

You can solve these problems with the sophisticated logical operators and flexible API integrations using a solution like Tray.io to set custom logic for your sales team across product lines, account size, territory, or other modifiers, and flow routed leads among any other applications, not just your CRM, but also to outbound email sequencing to kick off the sales cycle.

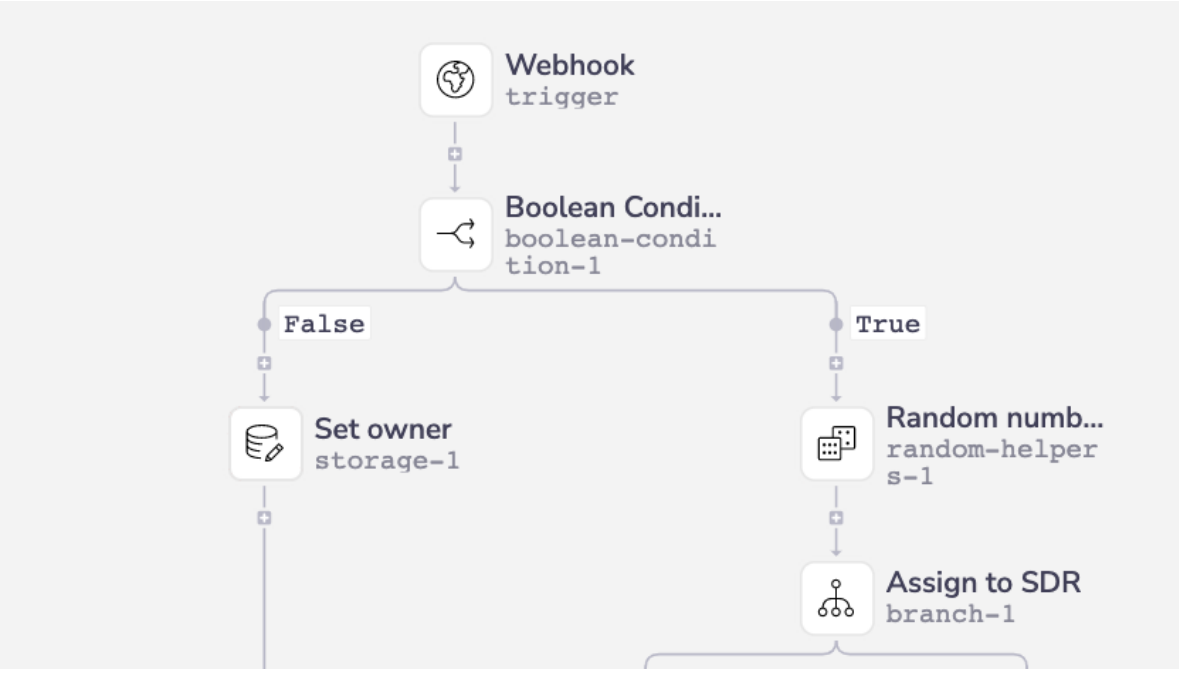
Example use case: Routing leads to SDR team plus auto-sequencing

This somewhat simplified example goes through a routing process kicked off by pulling in lead info from a webhook - a notification of a web-based event, in this case, a website visit. In this process, the automation workflow takes the information from a website visit and then verifies it against lead data within the marketing automation platform (MAP), such as Marketo, Eloqua, or HubSpot. The workflow then randomly assigns the lead among sales development representatives (SDR), and after the assignment, automatically loads that lead into an outbound email sequencing tool, such as Outreach or Salesloft, to kick off the first sales touch.

NOTE: The example shown here is purposely streamlined for educational purposes. A more-sophisticated workflow could easily incorporate additional custom logic, such as sequencing follow-up actions by qualification criteria, or by which offers leads engaged with. This type of workflow could also segment leads by account size or other criteria to flow certain leads to automated sequences while routing other leads directly to SDRs for manual follow-up.

Part I: Identify new leads and begin lead assignment process

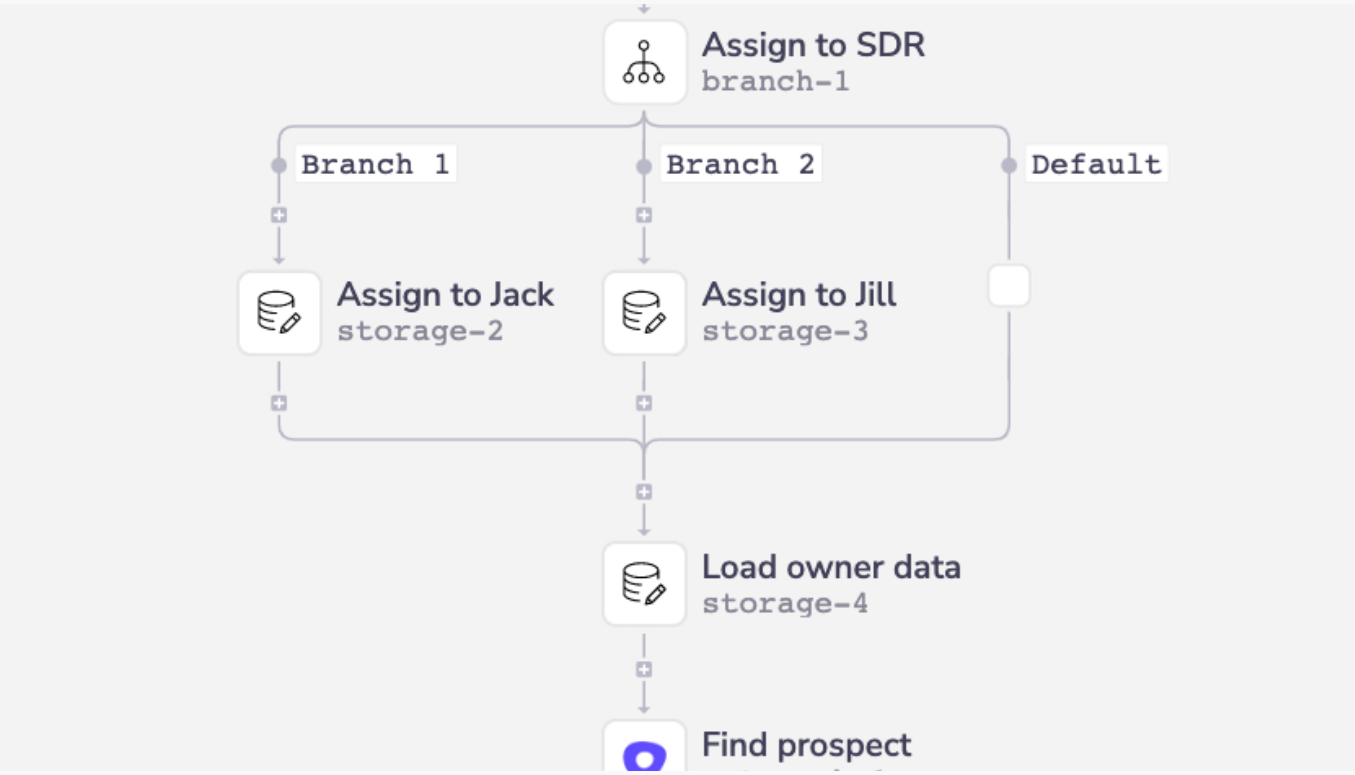
The first steps in our journey involve identifying an inbound lead, verifying against MAP records, and beginning the assignment process.



- **Webhook:** The process starts with a webhook-based trigger that begins whenever a new lead is captured and validates it against records within the marketing platform.
- **Boolean If/Then:** The workflow then determines whether the owner field for the lead is properly filled out at sales-ready status.
- **FALSE - Set Owner Data: I**f the Boolean operator determines a “false” outcome - that the lead owner field is not set properly - it corrects the owner field.
- **TRUE - Random Number:** If the Boolean operator determines a “true” outcome - that the lead owner field is properly set for being sales-ready - it generates a random number to decide which member of the SDR team gets the lead assignment.
- **Workflow Branch:** This branching helper then opens up branching logic to account for the multiple members of the SDR team.

Part II: Round Robin leads to SDRs and begin outbound process

The next leg of this automated workflow assigns the lead to the appropriate SDR, then automatically kicks off the outbound email sequencing process.



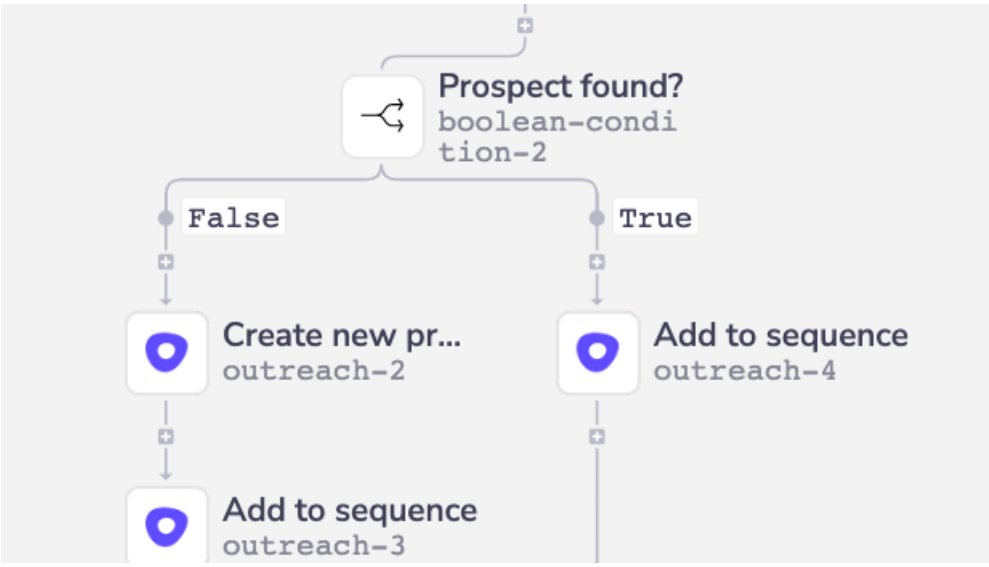
- **Data Helper - Assign to:** These steps in the workflow branch accept the data from the Random Number helper in our previous steps. Depending on the random number generated, the lead either gets assigned to SDR Jack or SDR Jill.

- **Data Helper - Load Owner Data:** Next, the workflow, having determined the owner of this lead, loads the owner's identity to transfer into outbound sequencing, in this case, provided by Outreach.

- **Outreach - Find Prospect:** Next, the workflow loads the lead owner into Outreach and locates that lead's data within the Outreach platform.

Part III: Confirm lead exists in sequencing and begin outbound outreach

The final part of this automated workflow briefly determines whether this lead's information exists in Outreach, then places the lead into a sequence to begin outbound.



- **Boolean If/Then - Prospect Found?:** This Boolean step checks to see if the lead already has an existing record in the outbound sequencing tool, Outreach.

- **TRUE: Outreach - Add to Sequence:** If the lead already has a record in Outreach, it adds that lead to the appropriate outbound sequence and automatically starts reaching out to this lead.

- **FALSE: Outreach - Create New Prospect:** If the Boolean determined that this lead doesn't already exist in Outreach, the workflow creates a new record for this lead within Outreach.

- **Outreach - Add to Sequence:** Having created a new record for this lead in Outreach, it then adds that lead to the appropriate outbound sequence and starts reaching out to this lead.

> *Revenue teams are automating important processes like lead routing and even use sophisticated business logic to respond faster and with personalized messaging to drive higher response rates. Read about how some companies use automation platforms like Tray.io to personalize emails with prospects' Google search terms here.*

Takeaways

You should now have a more-complete understanding of the challenges across the full lead processing lifecycle:

- **Lead uploads**
- **Lead enrichment**
- **Lead-to-account matching**
- **Lead routing**

You've also got blueprints into how you can automate each of these important processes to get rid of messy manual work and respond faster to leads, increasing your sales team's ability to follow up more quickly and win more deals.

To learn more about how you can start automating your lead management processes, please request a Tray.io demo.

About Tray.io

Tray.io is the leader in low-code automation and integration. The Tray Platform is built to be fast, flexible, elastically scalable, and trusted to empower organizations to evolve faster and drive efficient growth. Builders can now connect their stack using a modern, low-code user experience to innovate business processes together rapidly.

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