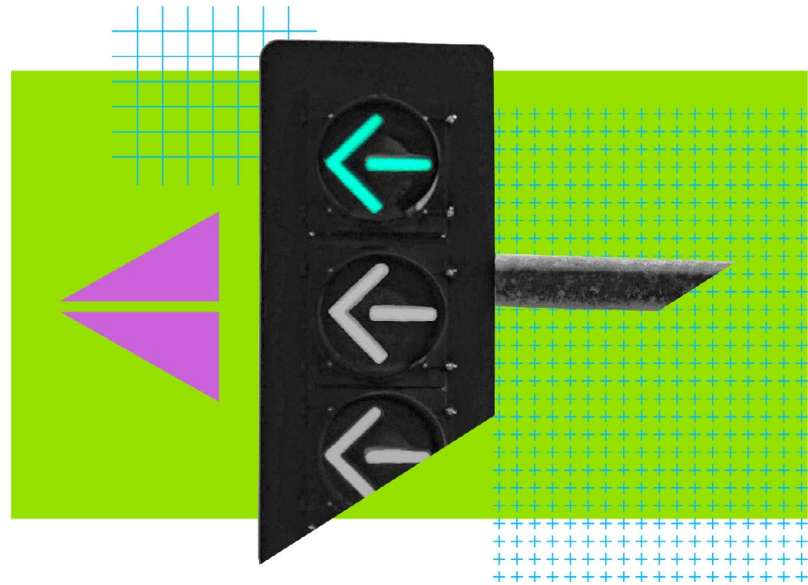


The comprehensive survival  
guide for lead routing and  
account assignment





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# Introduction

Almost every company routes leads and assigns accounts to sales reps using a CRM. You can use native CRM features and third-party solutions to do it, but RevOps teams tell us they're frustrated with both the reliability of these tools and the amount of time they spend on manual corrections.

The reality is you can't take on lead routing without first addressing several other foundational data processes, like data quality, segmentation, account hierarchy, lead-to-account matching, scoring, and grading. These processes provide the input and source data to route leads, but you need to automate these processes to get the best results.

Think of lead routing as the tip of the iceberg.

The set of processes forming the iceberg is called territory management automation. This guide will focus on lead routing and outline how it ties into the overall territory management automation process.

## **In this guide we'll cover:**

- Understanding territory management automation
- Understanding basic routing and assignment use cases
- Identifying common business requirements
- Scoping your technology needs
- Selecting the best technology options
- Implementing deployment best practices

**Let's dive right in.**

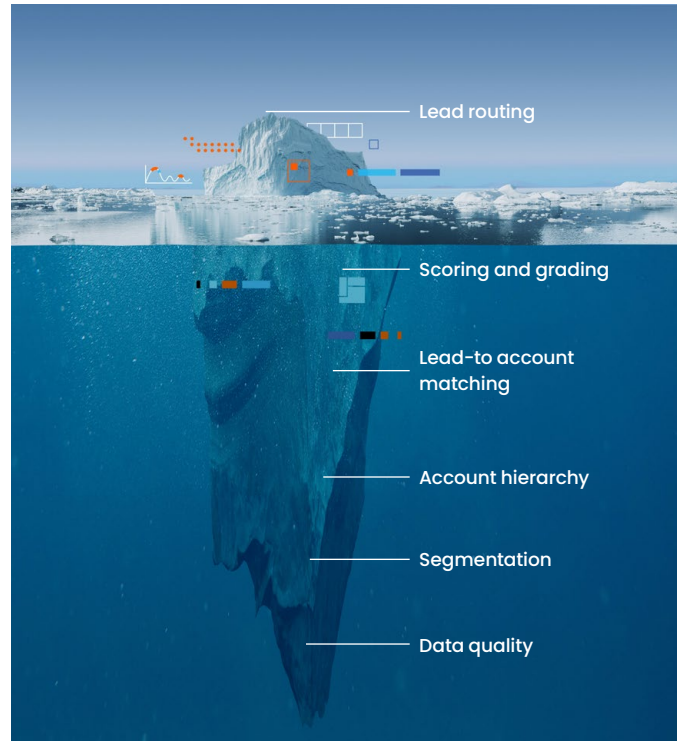
# Understanding territory management automation

Territory management automation is the processes and technology required to accurately assign all revenue-related relationships, typically represented by data objects in a CRM, and includes assigning:

- Sales reps to territories
- Accounts to sales reps and territories
- Buying centers or demand units to sales reps
- Leads and contacts to sales reps and buying centers
- Opportunities, orders, and tasks to sales reps

Territory management automation processes include data quality, segmentation, account hierarchy, lead-to-account matching, scoring and grading, and of course—lead routing. Some RevOps teams conflate lead routing and territory management automation, but recognizing the discrepancies between the two is critical for organizations seeking excellence in marketing, sales, and revenue operations.

Remember that success in routing starts from the bottom up, with the foundational processes at the bottom of the iceberg. Once you've automated those processes, you can focus on lead routing, the tip of the iceberg. Your end goal is to automate the entire territory management automation iceberg. For more information, we invite you to take a look at our [Territory management automation survival guide](#).





# Understanding basic routing and assignment use cases

Routing and assignment comprise a very broad category of use cases. Think about all the different data you have in your CRM: almost all that data has to be assigned to one or more people or queues.

## Here are some of the options you might need to consider:

- Routing a lead to a sales rep or a queue
- Assigning an account to a sales rep or a sales territory
- Routing a partner deal registration to a sales rep and a partner manager
- Assigning an opportunity to a service partner or reseller
- Assigning a salesperson's CRM role based on sales territory

For the sake of simplicity and readability, for the rest of this guide, we'll use either "lead routing" or "routing" as a general representation of all the different routing and assignment use cases. And we'll point out specific topics on these use cases as we go.

**While these examples involve different data sets and different groups of people or queues, the basic mechanics of routing don't change much.**



# Identifying common business requirements

While every company has a unique routing process, the basic rules that make up the total process tend to be standard across organizations. Here are the most common rules, which, as you'll see, are often laid out in different and inconsistent ways that add additional complexity.

## Routing by company size

In many companies, separate enterprise sales reps handle large accounts, and commercial sales reps handle medium to small accounts. Sometimes an SMB rep handles the smallest of accounts. The division between enterprise, commercial, and SMB accounts is usually based on some kind of numerical attribute, the most common being annual revenue and number of employees. Specific industries may use more meaningful attributes that better represent the size of the business, like:

- Size of the IT budget
- Number of vehicles in the fleet
- Number of storefronts or branch offices
- Number of rooms or beds in hotels and hospitals
- Number of students in a school district
- Number of hardware devices
- Tons of agricultural products and minerals produced
- Number of trucks or container loads of goods shipped

The company size definition can vary by geography and industry. For example, a typical retail business may have larger gross revenue than other similar-sized businesses. A medium-size bank in a large country may be bigger than a large bank in a small country.

### Common routing rules:

By company size by geography

By industry

By account

By business unit or technology platform

By customer and product

By round robin, load balancing, and shark tank



# Identifying common business requirements

## Routing by geography

Sales territory is most often defined by geography, so routing by geography is by far the most common type of routing rule. Geographical routing rules are often complex, involving a mixed bag of granularity: continent, country, state, county, city, metro area, postal code, and phone area code, to name a few. The most common geographical divisions consist of:

- Defining US territories primarily as collection of states.
- Dividing large states like California into regions—like Southern California and Northern California, by ZIP code ranges, or counties.
- Carving out large metropolitan areas like Boston from the rest of the state.
- Subdividing very large metropolitan areas like New York City by postal code, area code, or county.
- Splitting European territories into collections of countries.
- Breaking out multilingual countries like Switzerland and Canada by linguistic regions.
- In an extreme case—one of our customers divided Los Angeles by the I-10 freeway!

## Routing by industry

Many companies focus on or develop offers for different industries and use specialized sales teams to target those verticals. The public sector, for example, is a common “industry” that often requires a specialized sales team because of the way the government buys stuff and the tight ecosystem. Within public sector, you often have sub-specializations like state and local government, K-12 education, the federal government, military, and intelligence agencies.

You can also base industry routing on standardized industry data from vendors like Dun & Bradstreet, Orb Intelligence, Bureau van Dijk, or SIC and NAICS codes.

Government and higher education routing often use domain suffixes like .edu, .gov, and .mil. Federal government routing often uses an even more specific list of domains consisting of civilian organizations that work extensively or exclusively with federal agencies, like Mitre, Booz Allen Hamilton, and Lockheed Martin.

## Routing by account

Routing by account is conceptually simple. Just route the lead to the sales rep who owns the account. The challenge is how to match a contact to the right account, which is fundamentally a data quality problem. Some common challenges can arise when:

- The lead’s company name is different than the account name: IBM vs. International Business Machines, or Apple vs. Apple Corp.
- The lead’s email domain is different than the account’s URL: joe@us.ibm.com vs. www.ibm.com.
- Multiple accounts use similar names or an identical domain. These may be duplicate account records or different business units: IBM vs. IBM Global Services vs. Weather.com, an IBM Company.
- Multiple accounts represent country business units of the same company but have different URLs: www.ibm.com vs. www.ibm.jp.



## Identifying common business requirements

When dealing with accounts under a parent company, multiple levels of parent companies can complicate account ownership. For example, most firmographic data vendors provide data for:

- Parent company
- Domestic ultimate parent
- Global ultimate parent

But even this data can still be insufficient because there may be multiple layers of parent companies between the parent and the domestic and global ultimate parents.

### Routing by business unit/ technology platform

Large companies with multiple business units or acquired businesses often have multiple instances of CRM and marketing platforms. When a company acquires a lead, it often comes in through the wrong “front door.” When a lead comes into the wrong business unit or even just the wrong landing page hosted on a different marketing automation platform, that lead often becomes un-routable, or it gets routed to a sales rep who simply disqualifies it, since (a) sales reps rarely have an incentive to spend time and energy rerouting leads to the right business unit, and (b) it’s no trivial task to reroute a lead to another business unit.

Companies that need to route leads across business units and marketing platforms often use data gathered on the interest and intent of the lead, like “I’m interested in these solutions.” This can be as simple as a picklist choice from a form, or there may be a need to decipher freeform text from a note or comment field.

### Routing by customer and product

You almost always want to engage with your customers differently than the way you engage with prospects, even if the person you’re speaking to isn’t directly engaged with your product just yet. Customer Account Managers (CAMs, or “farmers”) usually handle customers, while Account Executives (AEs, or “hunters”) handle new prospects. With this distinction in mind, you may want to route customers (or former customers) to different product specialists.

To route a lead to a CAM, AE, or a product specialist, you need to know whether a specific account is a customer or a former customer, which product they purchased in the past, and what they’re actively using now. For products with user information like software, you’ll also need to know if the person is a user and of which product.

### Routing by round-robin/ load balancing/or shark tank

Leads may not always be routed to a specific sales rep at first but rather to a team or a queue. You can use different routing methods within each queue. Here are the three most common ones and how they compare:

- **Round-robin distributes leads sequentially.** For example, if there are three sales reps in the queue, the first lead goes to the first rep, the second lead goes to the second rep, the third lead goes to the third rep, and the fourth lead goes to the first rep again.



## Identifying common business requirements

- **Load balancing is a more sophisticated version of round-robin.** You use a credit system to track the workload of each sales rep and assign the next lead to the sales rep with the lightest workload. For example, when you add a new sales rep, who has no leads at all, all the new leads will go to that new salesperson until their workload catches up with the rest of the team.

- **Shark tank is basically first come, first served.** Once the lead is assigned to a queue, the sales reps need to jump on it and grab the lead off the queue before others do. Every coffee and bathroom break can potentially be costly.

## Other not-so-unusual routing rules

Here are some other routing methods we've seen, based on:

- Who created the lead record and that person's role, for example, sales or support.
- Whether there's an active opportunity or a closed lost opportunity.
- Whether there's been a meeting.
- If there's a partner involved.
- Whether it's a new lead or a re-opened lead.
- Preferred language.
- Related technologies used.

# Scoping your technology needs

As with many projects in business, to maximize your success, you need to follow this sequence:

- People
- Process
- Data
- Technology

## People

Figure out the people aspect first. Then ask these questions:

- Who's responsible for defining the routing requirements and process?
- Who's responsible for managing the requirements and "sorting out the details" on a day-to-day basis?
- Who's responsible for selecting the technology?
- Who's responsible for implementing and managing the technology?
- Any other stakeholders you need to involve?

## Process

Once you answer the "who" questions, you can move on to the "what" questions. What are the exact routing requirements and processes supporting those requirements?

- Is there a service level agreement (SLA) that dictates how quickly a sales rep must act on a new lead before it gets rerouted to someone else or gets escalated to management?
- If a lead can't be routed automatically, what's the manual backup process?
- If a lead is routed incorrectly, what should a sales rep do to reroute it?
- What's the mechanism to prevent leads from getting stuck in "black holes"?

- Which process performance metrics and KPIs should be measured and reported on? For example:
  - The average number of leads owned by a sales rep
  - The average time it takes the rep to act on a new lead
  - The average number of times a lead must be rerouted due to SLA failure or routing error
  - The percentage of leads that can't be routed or that get routed incorrectly
- What's the process for requesting, approving, and implementing a change?
- If you use round-robin and load balancing methods, how do you manage the following?
  - The sales rep is out of the office.
  - The sales rep has too large or too small of a workload.
  - The sales rep's getting credit for bad leads or is abusing the system.
  - Ramping up a new sales rep or re-onboarding one returning from out of office.
- If you use the shark tank method, what's the mechanism to control lead hoarding and over-aggressive behavior?
- What flexibility or willingness do you have to change these processes to fit the technology you choose?
- What's your data management process? See the section below for more on data.
- Is there a need to experiment and simulate different routing models?

# Scoping your technology needs

## Data

It's well and good to define your process and RevOps automation requirements, but first, you need raw data to drive your processes. Ask yourself these key questions:

- Do you have the data you need to support the processes you want?
- Who owns the data you need?
- Which are the systems of record for the data you need?
- How can you access the data you need, and what restrictions exist?
- If you don't have the necessary data, can you obtain it?
- If you have the data or can obtain it, is the data of good enough quality to support automation?
- How will you maintain data quality on an ongoing basis?
- If you need to acquire third-party data, who has the data you need? How do you evaluate which vendors have the most suitable data (notice we didn't say "best" data, but the data best suited to your go-to-market strategy)?
- Who's responsible for managing all the data? Do you need a data steward?
- What's your data management process? [See the section "Process" for more information.](#)
- Is the data you need subject to privacy and security mandates? If yes, what controls do you need to put in place within your processes?

Without spending a single additional dollar to acquire data, the industry data fill rate improved from 15% to 85%!

## Here's a real-world story from an Openprise customer on why sorting out your data is so important:

Company M's Sales Operations team complained for years that they couldn't route leads accurately because they were missing a lot of data required for routing, including industry, company size, and address. For example, only 15% of the lead records in their CRM contained industry data.

Despite spending money to acquire data year after year, the missing data problem never improved. After working with Openprise, the team discovered the reason: poor data management practices and scattered data ownership—sales ops, marketing ops, sales, and demand gen groups all independently acquired data. Additionally, all the acquired data was scattered across multiple sets of custom objects and custom fields.

Digging into Company M's data, Openprise found ten different industry fields and six sets of addresses, along with many different phone numbers and emails. After implementing a data management process and a data unification exercise, Openprise unified these disparate data sets into a data set that we then used to update the primary fields. Without spending a single additional dollar to acquire data, the industry data fill rate improved from 15% to 85%!

Lead routing is very much a data-driven process, and it'll never work well if you don't pay proper attention to the data.

## Technology

Once you've worked through any issues around people, process, and data, you're finally ready to address technology.

# Selecting the best technology options

Now that you have a firm grasp on your use cases and the routing methods your organization needs, you'll likely want to automate the routing process. So what are your options, and what's the trade-off between these options?

## Native CRM routing rules

Most CRMs like Salesforce use built-in lead routing capabilities. If your routing requirements are simple, this option is a perfectly good way to go. As your requirements become more complex, these native routing rules can become quite difficult to manage. We call this "spaghetti code." The screenshot below shows an example from an Openprise enterprise customer. Sadly, this is page one of five.

Since built-in routing rules are part of the CRM platform, you can't test and experiment in the production environment. So you typically make changes in a development box and test in a sandbox before pushing the changes to the production box.

Action	Order	Criteria	Assign To	Email
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Edit   Del	2	(Lead: UTM_Source STARTS WITH partner-) AND (Lead: UTM_Source CONTAINS @)	Dimira Philips	<input type="checkbox"/>
Edit   Del	3	(Lead: Last Name STARTS WITH test) OR (Lead: First Name STARTS WITH test) OR (Lead: Company STARTS WITH test,nutank) OR (Lead: Email CONTAINS @test.com,@mailinator.com,@example.com,@nutank.com)	Disqualified Leads	<input type="checkbox"/>
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# Selecting the best technology options

## Custom code

Some CRMs support scripting. Salesforce, for example, has its own APEX programming language. If the native routing rules can't handle the complexities of your routing process, you can always resort to writing code.

### Pros:

Writing code offers infinite flexibility. If you can describe it to a developer, you can do almost anything.

### Cons:

Writing code is the most expensive solution. Updating custom code is almost always slow and painful. And when code changes hands, there's a good chance the new person would want to start over instead of maintaining the code somebody else wrote.

### Recommendation:

Unless you have absolutely no other viable solution, we strongly recommend against writing your own code.

## Purpose-built/point solution

There are a number of good purpose-built lead routing solutions on the market. They typically handle some combination of the following capabilities:

- Lead-to-account matching
- Lead routing
- Account assignment
- Territory modeling

Some also include forecasting, attribution, and basic data quality capabilities.

### Pros:

Can deploy a solution quickly and manage it without too much headache—provided you've got relatively clean data and standard routing logic.

### Cons:

The complexity of the configuration can quickly escalate if your data quality is poor. We'll discuss this in more detail in the [best practices](#) section below.

As your routing requirements become more complex, you may also find yourself adding custom "plug-ins" to your out-of-box solution. Custom plug-ins are custom code your vendor writes for you. They come with all the downsides of custom code, plus the dependence you'll now have on your vendor to maintain the code for you.

### Recommendation:

We strongly recommend against using custom plug-ins.



# Selecting the best technology options

## General-purpose automation platform

You can configure many general-purpose automation platforms to route leads, namely:

- RevOps automation
- Workflow, enterprise service bus, or business process management (BPM)
- Cloud integration

### Pros:

**Flexibility.** The platforms can vary between no-code, low-code, and you-need-to-be-very-very-technical. But even the no-code platforms have much more flexibility than point solutions.

General-purpose platforms can also handle a large variety of use cases on a single product, vs. the need to use a collection of point solutions. If you're looking to consolidate your tech stack, this can be a huge benefit.

A RevOps automation platform can automate every foundational process required for success in lead routing and territory management automation, making it the most robust and scalable option.

In contrast, having a stack of point solutions can introduce a number of technical debt-related challenges, including:

- Overlapping product features.
- Synchronizing data silos introduced by each solution.
- Coordinating between independent point solutions.
- Managing multiple integrations to your CRM.
- Managing your CRM's API quota as each point solution pulls the same data multiple times.
- Creating daily data quality issues if multiple point solutions update the same data.

### Cons:

**The learning curve.** As with any enterprise software platform, it takes training and commitment to use it effectively.

Deploying this type of platform for a single use case probably doesn't make sense financially. If you can apply the platform to a number of use cases, you can offset the commitment and upfront cost against the long-term savings derived from not having to buy and manage multiple point solutions. For example, in sales operations, you'd save substantially over multiple point solutions by using a RevOps automation solution for the following purposes:

- Data quality
- Lead-to-account matching
- Lead routing
- Account assignment
- Territory modeling
- Account hierarchy construction
- Segmentation
- Scoring and grading



# Implementing deployment best practices

To help you automate the right processes and select the right technology for lead routing, let's discuss some common best practices, important questions to ask, and key design decisions to consider.

## Implementing a robust, scalable, and manageable solution for lead routing can be tricky when you have:

- Multiple stakeholders and users.
- Constantly changing lead assignments given the fluidity of the sales team.
- A complex and growing modern technology stack with a lot of technical debt.
- Pressure to execute fast.

The consequences of a bad process can be costly.

## Don't forget about data quality

Lead routing and account assignment are great examples of data-driven processes. You need quality data to ensure the routing process has a high degree of accuracy, reliability, and flexibility to handle unique processes. If you use another technology or process to handle CRM data quality, then you have one less consideration to worry about. If your data quality isn't great, you need to decide how to address this data quality prerequisite:

**Option 1** is to pick a best-in-class data quality solution and a separate best-in-class lead routing solution.

**Option 2** is to go with a single solution that can automate both types of processes. Refer back to our earlier discussions about [point solutions vs. general-purpose platforms](#). Many of the pros and cons discussed there are quite relevant here.

## Effective lead routing = quality data + usable data

You may have accurate and complete data that's still not usable for lead routing because it hasn't been contextually groomed for your go-to-market needs. Here are three common examples:

- Company size is often used as a routing criterion. The definition of small, medium, large, and enterprise is unique to each company. Even within a company, it can vary among different sales teams that focus on different geographical regions and industries.
- Should Puerto Rico be a country or a state in your CRM? It depends on whether Puerto Rico is covered by your US sales team or your Latin America sales team.
- Companies with some level of industry focus will require industry data to be more granular within their area of focus and less granular outside that area of focus. For example, a company selling X-ray products will want granular industry data in healthcare and heavy industries but may not care about verticals like retail and business services.



# Implementing deployment best practices

A scalable and manageable lead routing process needs not only quality data but the ability to customize, combine, and interpret the data to meet routing and segmentation needs. There are two ways to approach this:

- 1. The methodical approach:** make this part of your data requirement, so your CRM database is not just accurate and complete but supports proper segmentation and data mapping to fuel your sales organization. This approach simplifies the routing process and ensures all your processes, automation, and analytics are driven off the same data standard for consistent execution and measurement.
- 2. The quick and dirty approach:** implement these data interpretation requirements into your routing tool as additional rules. The downside is that without a common database, this ad-hoc approach will create inconsistencies across different processes like attribution and scoring, and will also make accurate analytics difficult. Point solution vendors often evangelize this approach to sidestep the difficult but necessary discussion about data quality and the interdependence of data across all systems and processes. This approach increases the complexity of your routing logic significantly.

## How to deal with dirty account data

When it comes to the lead routing process, the big pink elephant in the room that people don't want to talk about is dirty account data. Most companies' CRM account data is incomplete, inaccurate, and full of duplicates. Cleaning up account data is way more difficult than cleaning up lead data. Not because it's technically difficult, but because it's politically difficult. We still haven't met a single sales rep that will let their accounts be automatically deduplicated and merged. As a result, CRM account cleanup is always manual and tedious, even when assisted by technology. That means it rarely gets done.

So if part of your routing rules require matching leads to accounts and assigning leads to account owners, how do you meet that requirement when your account data is dirty and full of duplicate records? Similar to the data usability challenge, there's a methodical way of doing it and a quick and dirty way of doing it.

- 1. The methodical approach:** clean up your CRM account data. Remember cleaning up account data is not technically difficult, but politically difficult. The trick is to clean up your account data outside your CRM and create a separate clean account master that resides in a separate database. This can be a standalone database, a data warehouse, a Customer Data Platform, or a RevOps automation platform. This clean account master should be based on your CRM's account data and be cleaned and updated at least multiple times per day. All the processes and analytics, including lead routing, can be driven from this single clean account master.
- 2. The quick and dirty approach:** embed complex logic to sort through the dirty data as part of each point solution, including routing. All the issues with manageability, scalability, and consistency discussed above apply here as well.

## Is account hierarchy required?

Sales teams using an enterprise sales approach often need to route leads based on the target account's relationship to its parent and child companies. So it's necessary to understand the account hierarchy before properly assigning an account. For example:

- Assigning all accounts and leads to the Domestic Ultimate or Global Ultimate organization (borrowing Dun & Bradstreet terminology here).
- Assigning business units with less than 1,000 employees to a parent along the hierarchy with over 1,000 employees.



# Implementing deployment best practices

Firmographic data vendors can provide parent, domestic ultimate, and global ultimate data. To make this data useful for real-time automation, you need to prepare this data by mapping out the full hierarchy and appending the full-path information to each record so that each record can be standalone. If this is part of your account assignment or lead routing requirement, make sure your technology choice includes capabilities to prepare this account hierarchy data.

## Do I need to buy data?

The short answer is yes. In most organizations, lead data coming in at the top of the funnel is sparsely populated, often with just five to seven basic fields like name, company, and email. Other fields like industry, annual revenue, employee count, address, domain—the data that’s often required to drive routing decisions—need to be enriched using third-party data providers. Since data can come into the CRM through multiple channels, depending on where and when the routing happens, you need to insert enrichment steps to fill out the necessary data before routing. If you have real-time routing needs, that means the enrichment process has to be real-time as well, and often tightly coupled with the lead routing process.

Once again, when designing your routing process with enrichment, you’ll need to decide whether to use a single technology platform or a number of point solutions. Enrichment is a complex topic in its own right. To learn more about the nuances of enrichment, we invite you to take a look at [The complete data enrichment survival guide for sales and marketing](#).

## Data unification

Remember the [Company M story](#) from earlier? The company that improved its industry data fill rate from 15% to 85% after unifying its 10 industry fields?

As part of your effort to understand whether you have sufficient data to automate lead routing, inventory your database to see what data may be hiding under the rocks. Unifying this scattered data may be the answer to your data needs.

## Data-driven configuration vs. hard-coded logic

One of the key challenges to automating lead routing is how quickly business logic changes. Large sales organizations, especially in technology companies, seem to be in a constant state of flux. Sales reps come and go, sales territories get tweaked, SDRs in a round-robin queue go on vacation. One key challenge we see is that business objectives change faster than a company’s ability to update its routing logic in its technology solution. Whatever technology you implement, there are two ways to set up your routing rules: hard-coded vs. data-driven.

Most companies hard-code their routing rules. Hard coding doesn’t mean it’s actually written code; it can be a rule or a configuration. But if even a small change in routing logic requires you to modify code or system configuration, then it’s considered a hard-coded configuration.

In comparison, a data-driven setup is one where a significant portion of the routing logic is driven by a set of data that’s been externalized, so the behavior of the routing logic can be altered by simply changing the input data set. The system configuration only models the structural framework of the routing process, which doesn’t change often, whereas the more granular rules, which change frequently, are externalized.



# Implementing deployment best practices

For example, the structural framework can be something like:

- Routing California leads by ZIP code.
- Routing the rest of the US by state.
- Routing Europe by country.
- Routing the rest of the world by alphabet.
- Routing public sector leads by domain suffix and industry.

- Routing federal government leads by a list of domains.

The actual mapping of each territory and sales rep to the individual California ZIP code ranges, US states, European countries, domains, alphabets, and the like are externalized into a spreadsheet, a database, or a CRM custom object.

Here's an example of a simple spreadsheet that contains externalized routing data:

Rule Type	Territory Name	Country	State Province	Postal Code Min	Postal Code Max	SDR Email	AE Email	Alphabet
Special	Analyst					sd@company.com	sd@company.com	
Special	Investor					sd@company.com	sd@company.com	
Special	Partner					sd@company.com	sd@company.com	
Special	Media					sd@company.com	sd@company.com	
Special	Vendor					sd@company.com	sd@company.com	
Special	Competitor					sd@company.com	sd@company.com	
Special	Technology Partner					sd@company.com	sd@company.com	
State	Northeast	United States	New York, Massachusetts, New Hampshire, Vermont, Connecticut, Maine, Rhode Island			sd@company.com	sd@company.com	
State	Mid Atlantic	United States	Delaware, Maryland, Pennsylvania, District of Columbia, Virginia, West Virginia, New Jersey			sd@company.com	sd@company.com	
State	Great Lakes	United States	Ohio, Michigan, Indiana			sd@company.com	sd@company.com	
State	Southeast	United States	Florida, Georgia, Mississippi, North Carolina, South Carolina, Puerto Rico			sd@company.com	sd@company.com	
State	Central South	United States	Alabama, Arkansas, Kentucky, Louisiana, Missouri, Oklahoma, Tennessee, Texas			sd@company.com	sd@company.com	
State	Central North	United States	Illinois, Iowa, Kansas, Minnesota, North Dakota, South Dakota, Wisconsin, Nebraska			sd@company.com	sd@company.com	
State	Mountain	United States	Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming			sd@company.com	sd@company.com	
Postal Code	SoCal	United States	California	90000	93499	sd@company.com	sd@company.com	
Postal Code	NorCal	United States	California	93500	96054	sd@company.com	sd@company.com	
State	Pacific	United States	Alaska, Hawaii, Oregon, Washington			sd@company.com	sd@company.com	
Country	Canada	Canada				sd@company.com	sd@company.com	
Alphabet	A to C					sd@company.com	sd@company.com	a, b, c
Alphabet	D to J					sd@company.com	sd@company.com	d, e, f, g, h, i, j
Alphabet	K to Q					sd@company.com	sd@company.com	k, l, m, n, o, p, q
						sd@company.com	sd@company.com	r, s, t, u, v, w, x, y, z

Here's an example of round-robin routing rules and management parameters externalized into a Salesforce custom object:

Action	Queue Name	Round Robin List Name	Assign To Owner	Load Counter	Skip	Out-of-Office Starting Date	Out-of-Office Returning D...	SLA In Hours	Max Open MGLs	Contacts Being Worked On	Average Hours in Queue
<input type="checkbox"/> Edit   Del	New MGLs   JAMER LATA...	New Queue	New Queue	67	<input checked="" type="checkbox"/>	10/7/2019	10/14/2019	24	100		
<input type="checkbox"/> Edit   Del	New MGLs   JAMER LATA...	New Queue	New Queue	62	<input checked="" type="checkbox"/>	10/21/2019	10/28/2019	24	1	2	
<input type="checkbox"/> Edit   Del	New MGLs   JAMER LATA...	New Queue	New Queue	55	<input type="checkbox"/>			24	100		
<input type="checkbox"/> Edit   Del	New MGLs   JAMER MRR...	New Queue	New Queue	55	<input type="checkbox"/>	9/30/2019	10/7/2019	24	100	2	137
<input type="checkbox"/> Edit   Del	New MGLs   JAMER MRR...	New Queue	New Queue	56	<input type="checkbox"/>			24	100		
<input type="checkbox"/> Edit   Del	New MGLs   JAMER MRR...	New Queue	New Queue	57	<input type="checkbox"/>			24	100	2	168

Externalizing routing rules and parameters not only make a routing process more agile and manageable, but they also enable the stakeholders who own the routing requirements to manage rules in a familiar environment—whether

by spreadsheet or CRM page—and not have to learn a new routing tool or rely on a few trained users in IT or sales ops to make all changes big and small.

# Implementing deployment best practices

## Batch vs. real-time

What's the SLA for how quickly to route a new lead? This SLA will dictate whether you need real-time lead routing or can get by with batch-based processing. While real-time lead routing provides better performance, it comes with a cost. To route leads in real time, you'll need to implement a trigger in your CRM to detect when a lead gets created or changed. Too many triggers can destroy your CRM's processing power and usability, resulting in:

- Slow response time when making changes to a record or saving a record.
- Reduction in batch size for all batch operations by UI or API.
- Longer time to complete any job.
- Increasing difficulty and complexity in debugging any automation.

So unless you absolutely must have real-time lead routing, we recommend using batch processing instead. Note that batch processing can be frequent small batches that run every five minutes, so you can still achieve near real-time processing results, not necessarily big jobs that run once every night.

## Native to CRM or standalone

In most cases, whether a solution is native to the CRM (native feature, native scripting language, or managed package) or a standalone offering has little consequence in whether it can meet your routing requirements, except when multi-platform routing is part of your requirement. If you need to route leads across different CRM's or multiple instances of the same CRM, you'll need to use a standalone.

## Day one vs. day two/new lead vs. reroute

Often routing requirements are different for a new lead (day 1) vs. an existing lead (day 2). Leads can require rerouting for a number of reasons, including updates to key attributes like address and industry data or an SLA-mandated reroute because a sales rep sat on a lead too long.

We can't suggest strongly enough: document every new, reroute, day 1, day 2, and wake-the-dead routing scenario.

## Routing vs. full onboarding

Is routing a standalone process, or is it part of a more complex onboarding process? For example, when someone signs up for a free trial, the full process may look like this:

- Verify whether the person already exists in the CRM.
- Verify whether the person's company already exists in the CRM.
- Create/update/convert the lead with all necessary information.
- Create/update the lead's account with all necessary information.
- Create an opportunity record.
- Assign the account, lead, and opportunity to a sales rep.
- Create a task for the sales rep to contact the new user within 48 hours.
- Add a new user to a marketing campaign.
- Set up the new user in the product database.
- Set up the new user in the security system.

If the routing requirement is just another step in a full onboarding process that needs to be automated, make sure you evaluate candidate technologies with that full scope in mind.

## Parting thoughts

In most organizations, lead routing is a mission-critical process. Automating lead routing can improve conversions, sales team performance, and sales team job satisfaction. But poorly automated lead routing using technology that's hard to diagnose, unable to scale, difficult to manage, and slow to update can create a bad engagement experience for prospects. It sucks time and resources from your IT and sales ops teams and creates frustration both for sales teams and the folks who have to manage the process.

That's why we always recommend building your lead routing process using a territory management automation platform. It is through that lens you realize that effective lead routing hinges on several prerequisite processes, including data quality,

segmentation, account hierarchy, lead-to-account matching, scoring, and grading. Executing these processes from the bottom-up using a holistic RevOps automation platform will ensure faster and more precise lead routing, and is a much better strategy than trying to build a lead routing system without the proper scaffolding.

Following the framework and best practices outlined in this guide can help you create a better lead routing strategy, design a better process, select the right technology, run a more successful deployment, and make all your stakeholders' lives a little better.

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### About Openprise

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