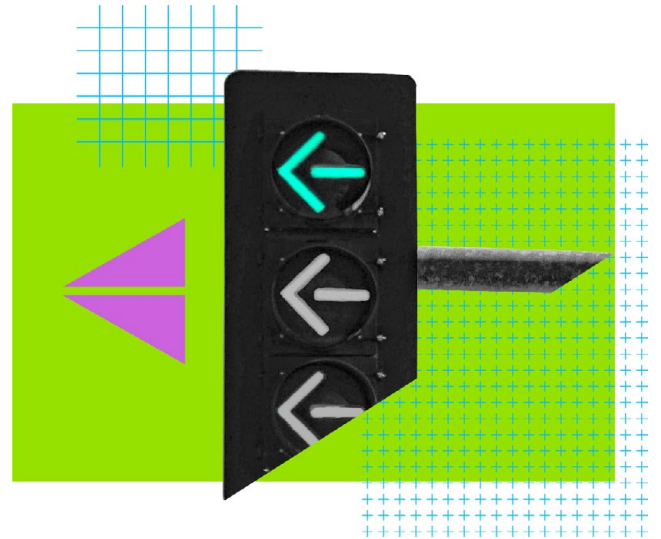


Lead Routing with the Openprise RevOps Data Automation Platform

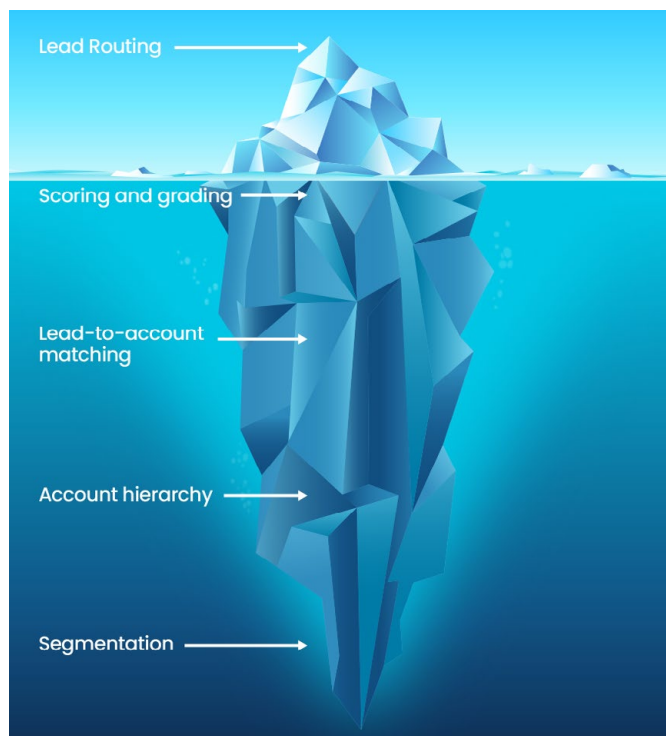
Getting the right lead to the right rep is exceptionally important to boost your conversion rate. But accurate and timely lead routing is a challenge for organizations with distributed sales teams.



Understanding lead routing challenges

Think of lead routing as the tip of an iceberg.

The main body of the iceberg covers several foundational data processes, like data quality, segmentation, account hierarchy, lead-to-account matching, scoring, and grading.



If you don't address these "hidden" processes, you're likely to:

- Route the lead to the wrong person or queue.
- Take a long time getting the lead to the right person or queue.
- Lose the lead altogether.

Once this happens, you can expect:

- **Low conversion rate.** Studies show conversions improve by up to 700% when following up within 30 minutes of engagement.
- **Poor customer experience.** Incorrectly routed leads can cause multiple salespeople to call on the same account—or nobody to follow up, creating a poor experience for the customers, not to mention disputes within the sales team.
- **Low campaign ROI.** Generating new leads costs money. Nurturing leads costs more money. Once you've deemed a lead good enough to pass on to sales, you've already invested a lot of money into that lead. Any leakage in the lead routing process directly reduces marketing's return on investment.

Route leads with agility

Lead routing is not a static activity. Organizations constantly shift territories, or reps within territories. Reps go on vacation or leave the company. All these activities require an agile lead routing system. Openprise delivers the agility you need to keep pace with constant changes in your organization.

Many organizations maintain complex spreadsheets to track lead assignments, then need to transfer all that information into the solution that manages routing. This is time-consuming, as re-programming CRMs or MAPs takes time and the systems are in use 24/7, especially at global businesses.

Openprise enables you to create rules and use a Google Sheet to maintain or update those rules. No need to access the Openprise platform, and there's no coding involved.

The secret to this agility is the way we streamline and automate all the processes involved in lead routing, giving you the ability to:

- Route leads based on geography, product interest, partner involvement, customer status, lead score, upsell potential, or any other criteria your business requires.
- Start with the least expensive data enrichment resources and add more specific data vendors only when needed.
- Create automated enrichment waterfalls to move from vendor to vendor so you're not reliant on a person clicking an "enrich data" button when one source doesn't pan out.
- Properly enrich and route leads to the right rep using fuzzy matching for company names.
- Easily update assignment rules whenever needed. If it takes hours to update your assignment rules in your CRM or MAP, it's too long. Quickly update your assignment rules and test the paths before you deploy to keep your fully automated, near-real-time lead routing machine running.
- Automate processes like double checking lists, verifying spreadsheets, and looking up leads for assignment.

Customer stories

Netskope

Netskope faced challenges to accurately route leads to the right salesperson. The tool the team used charged based on the number of seats—not ideal for a growing company. The Netskope team chose Openprise to help them tackle the lead routing problem and other projects like campaign attribution.

Based on Openprise best practices, the team implemented a complex routing table that defined how to route leads based on the account owner and, when the account owner is unknown, to use a waterfall decision-making process.

“The best part about using Openprise for lead routing is that my routing table is in a Google Sheet; it’s accessible and easy to maintain”, says Josh Ren, director of marketing operations.

Netskope now routes more leads faster and more accurately than before, and also takes advantage of Openprise lead-to-account matching to route contacts as well as leads, which it wasn’t able to do before.

“Whatever data processing you have to do, don’t do it in your CRM. Don’t do it in your marketing automation platform. It’s so much faster, and you can test your theory in Openprise before you deploy it in production.”

Josh Ren,
Director, Marketing Operations,
Netskope

Great Place to Work

The company sells three tiers of products, and the sales teams—incentivised by higher commissions—were focused on the higher-dollar leads, letting some of the lower-tier inquiries fall by the wayside. Additionally, the company was receiving international inquiries that should have been routed to one of the company’s 40 global affiliates.

Great Place to Work created two separate sales teams to address this challenge—one focused on low-value, high volume deals, and the other focused on high-value deals. The RevOps team implemented routing based on job role, which they found to be the proxy for product interest.

The Great Place to Work team used Openprise to populate the job role fields, inferring them from job titles. They also used Openprise to normalize and standardize the data acquired from multiple web forms that were not standardized.

Great Place to Work realized a 10% increase in close rates and a 38% increase in win rates.

Before Openprise, the team routed leads manually, using five full time employees. As a result of using Openprise to automate data normalization and lead routing, Great Place to Work reduced lead routing time from 24 hours to 20 minutes, and freed up two employees to take on more strategic tasks.

“As a result of faster response times and higher close rates, we justified purchasing Openprise on this one experiment. It was an amazing success!”

Pat Lechner,
Business Operations and Analytics Director,
Great Place to Work, Inc.

To get more information or schedule a demo, visit openprisetech.com or contact us at (888) 810-7774.

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About Openprise

The Openprise RevOps Data Automation Platform fuels company growth by automating hundreds of sales and marketing processes, helping RevOps teams realize the value promised from their RevTech investments. Openprise is a single, no-code platform that can help to simplify even the most complex RevTech stack. For more information, please visit www.openprisetech.com.