



ROUTING REVOLUTION

Teladoc Health's intelligent automation across multiple CRMs

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Agenda



- 1** What challenges were we facing?
- 2** Our process for comparing products and solutions to choose a winner
- 3** Configuring Openprise for our complex use case
- 4** Where do we want to go next?
- 5** Lessons learned and key takeaways

Teladoc[®]

HEALTH



About Teladoc Health

Teladoc Health is the global leader in virtual care. The company is delivering and orchestrating care across patients, care providers, platforms, and partners — transforming virtual care into a catalyst for how better health happens. Through its relationships with health plans, employers, and health systems, Teladoc Health fuels clinical excellence and applies the power of technology to help people live their healthiest lives.

Ultimate Problem:

Speed to Lead





Challenges

Manual lead management and routing process

Fragmented systems: Marketo ingest for multiple Salesforce systems

Multiple business segments with different rules

Compliance + accuracy expectations
slow the process in a regulated industry

Vendor evaluation approach

Requirements	OPENPRISE
Works across multiple Salesforce orgs + Marketo	★
Lead-to-Account matching at scale	★
Rule flexibility (geography, segment, company size) w/ easy change management	★
Data hygiene support: standardization + enrichment	★
Partnership with the CS team, not just software	★

Other tech evaluated:

LeanData



SYNCARI



Marketo

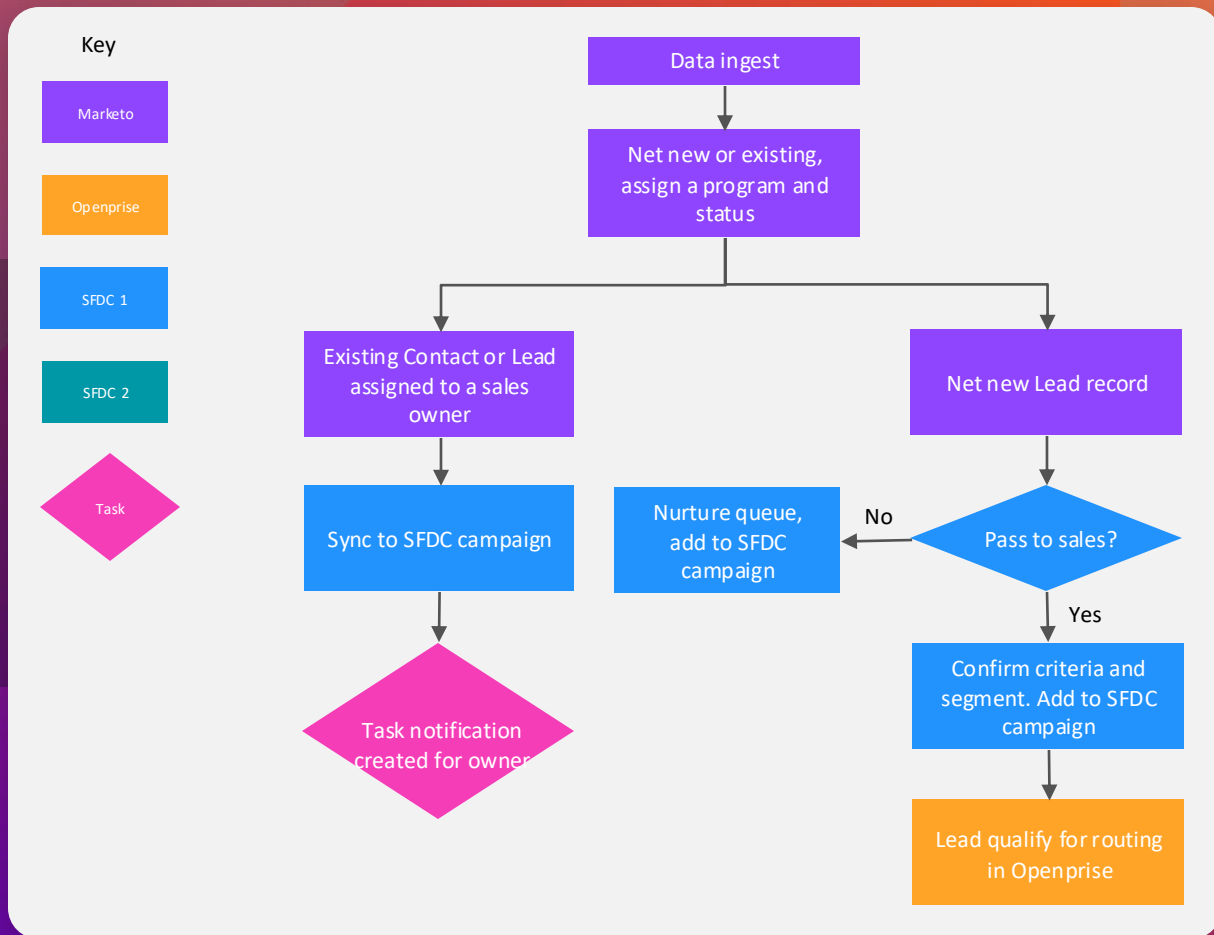
Business segments and technology

- 1** Marketo
The ingest point for all lead and contact activity
- 2** Salesforce Instance 1
4 of the 5 business segments live here
- 3** Salesforce Instance 2
The last business unit lives in their own
Salesforce due to complex product/quote configurations

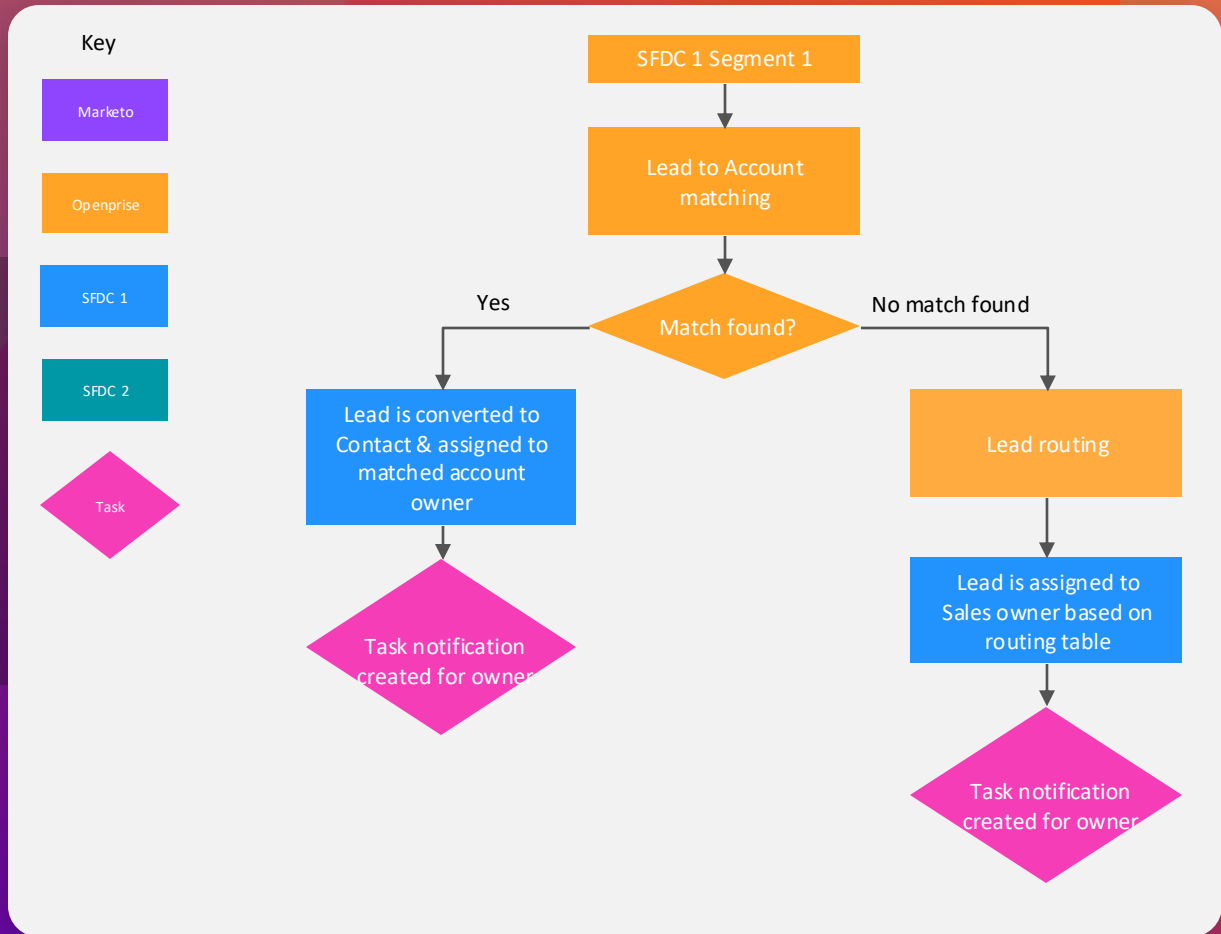
We chose flexibility and partnership over single-point solution tools — so we wouldn't box ourselves in later.



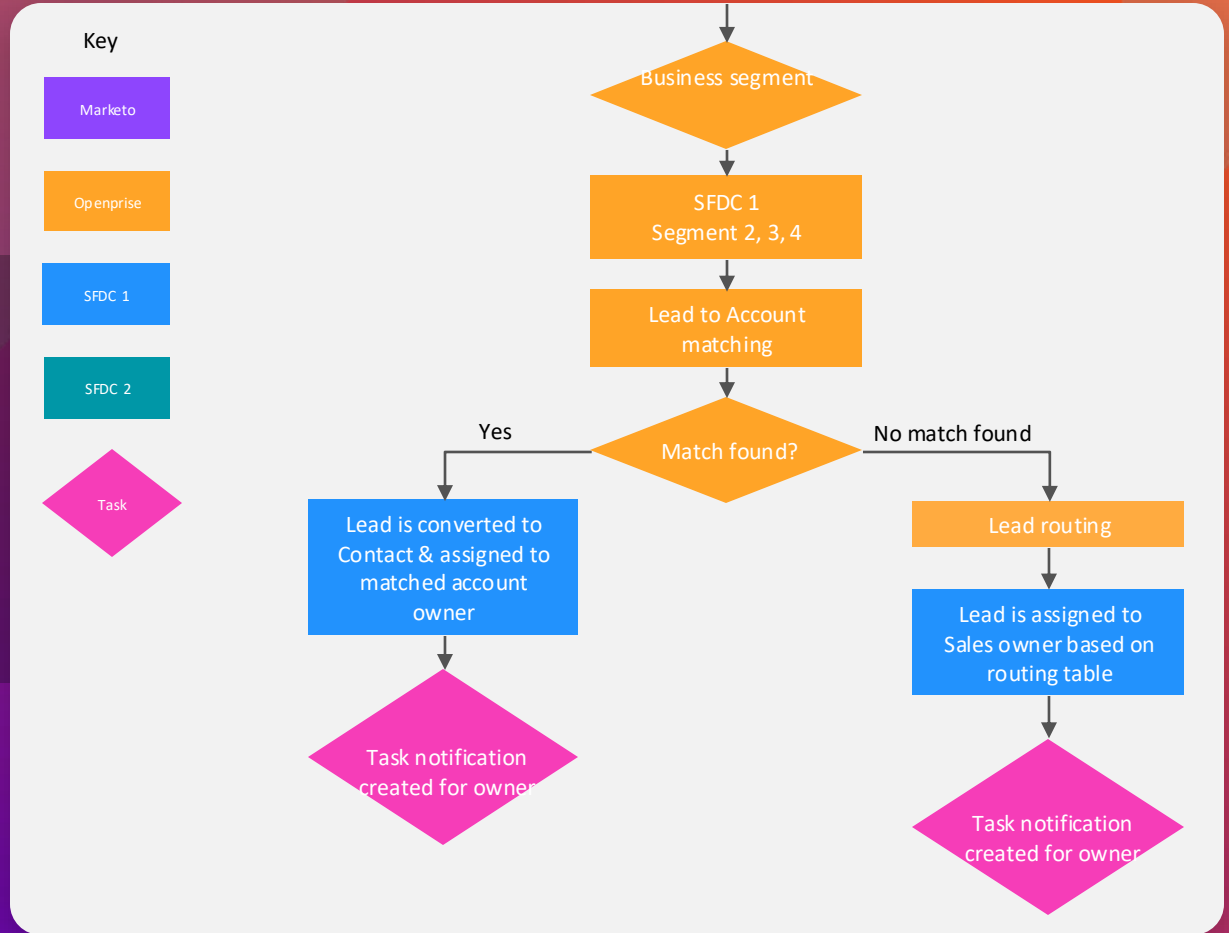
Data ingestion



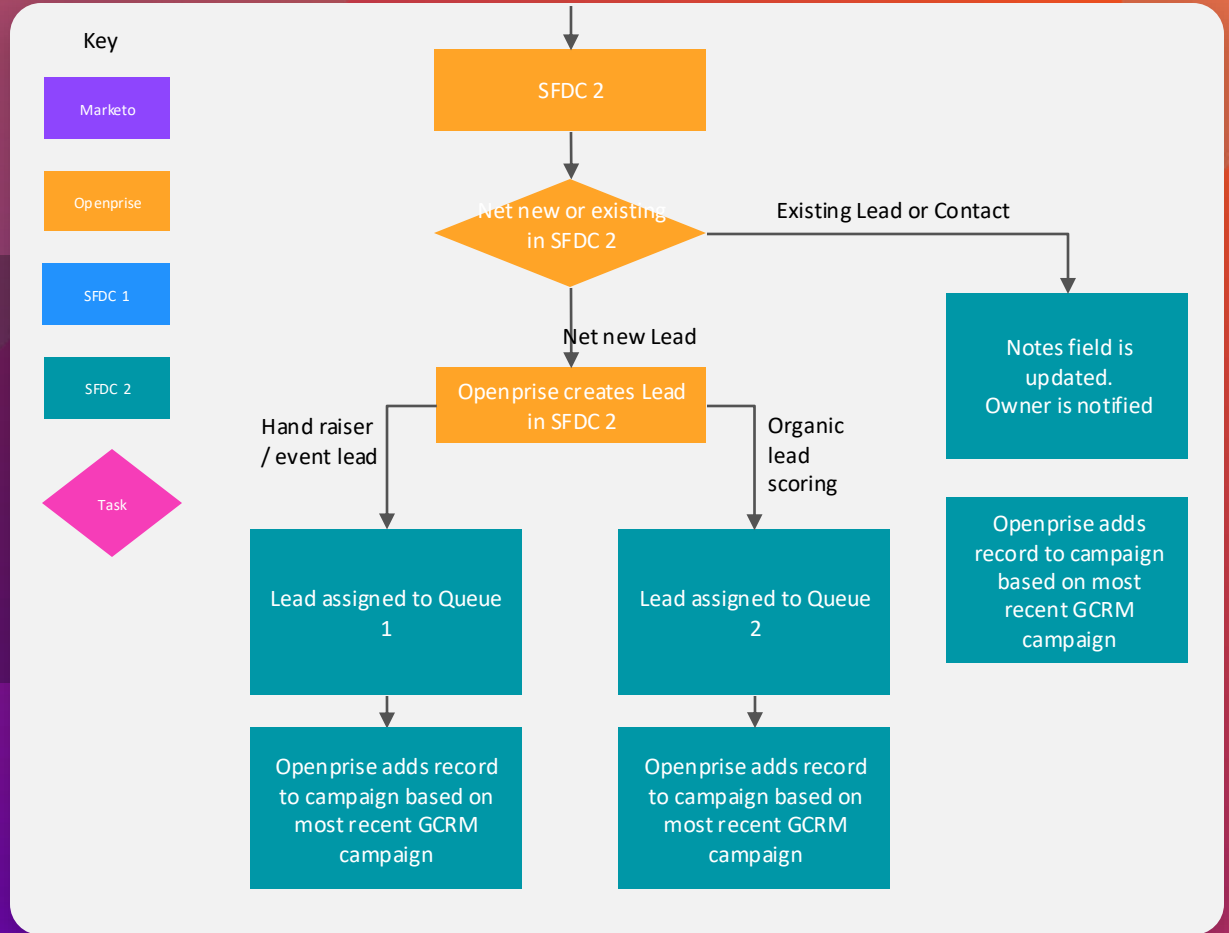
Primary / high volume segment in SFDC 1



Remaining segments in SFDC 1



SFDC 2



Single-pane view of our routing processes

The ability to **review the results**, on per record basis

The ability to **identify any issues** within a single app, on one single screen

OPENPRISE

Enterprise Apps **SFDC** **L2A & Routing Composite** **Routing Composite**

L2A Match - Errored

Columns **2. Filter** **View:** Search table views

Row	OP L2A match timestamp ↓	Email	OP Converted Error
1	2025-08-22T12:21:17.117Z		You're creating a duplicate record. We recommend you use an existing record instead.
2	2025-08-22T12:07:04.303Z		You're creating a duplicate record. We recommend you use an existing record instead.
3	2025-08-22T11:52:05.242Z		You're creating a duplicate record. We recommend you use an existing record instead.
4	2025-08-22T11:36:51.935Z		You're creating a duplicate record. We recommend you use an existing record instead.
5	2025-08-22T11:22:13.371Z		You're creating a duplicate record. We recommend you use an existing record instead.

Columns

- OP L2A match timestamp
- Email
- OP Converted Error
- OP matched account BillingCity
- OP matched account BillingCountry



Outcomes

Speed-to-lead

from days → minutes. On Average a record is converted or assigned in 10 minutes depending on the path it takes

Manual touches

from 3 people daily → 0 for standard flow


Routing accuracy

95-97% accuracy, for every 100 records 3-5 need to be reviewed or re-assigned.

What's next



- ✓ **Implement AI screening functionality** to try to better identify whether a record is qualified to route. For example: a B2B vs B2C records
- ✓ **Automated enrichment on a per record basis** to have better accuracy assigning records



Lessons learned & key takeaways

- 1 Start with the problem,** not tools; let the scope expand only where ROI is clear
- 2 Partner with CS —** “bring the problem, not a preconceived solution”
- 3 Your biggest blockers** may be your own CRM validation rules, not the orchestration layer.



Thank you