



OPTIMIZING THE FULL FUNNEL

How Nutanix automated lead flow and territory management



Chaitra Shivram

Marketing Operations
Manager

NUTANIX



Lauren Murray

Senior Customer
Success Manager

OPENPRISE®

Budget pressure



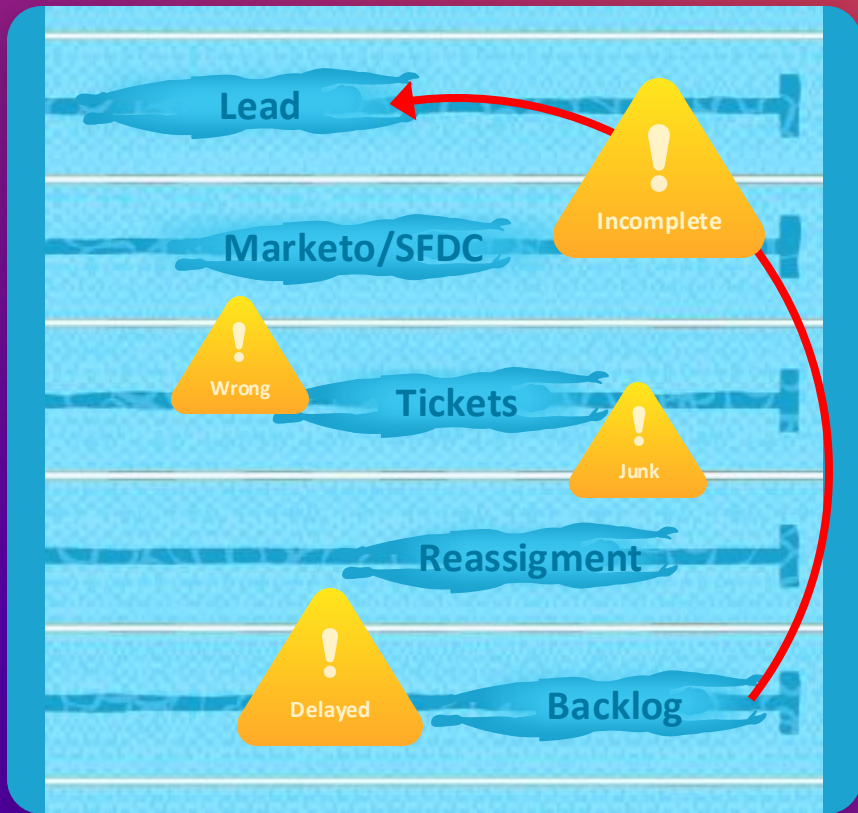
Vendor sprawl



Broken handoffs



Where we started



Gap



Cross-arrows



Trash



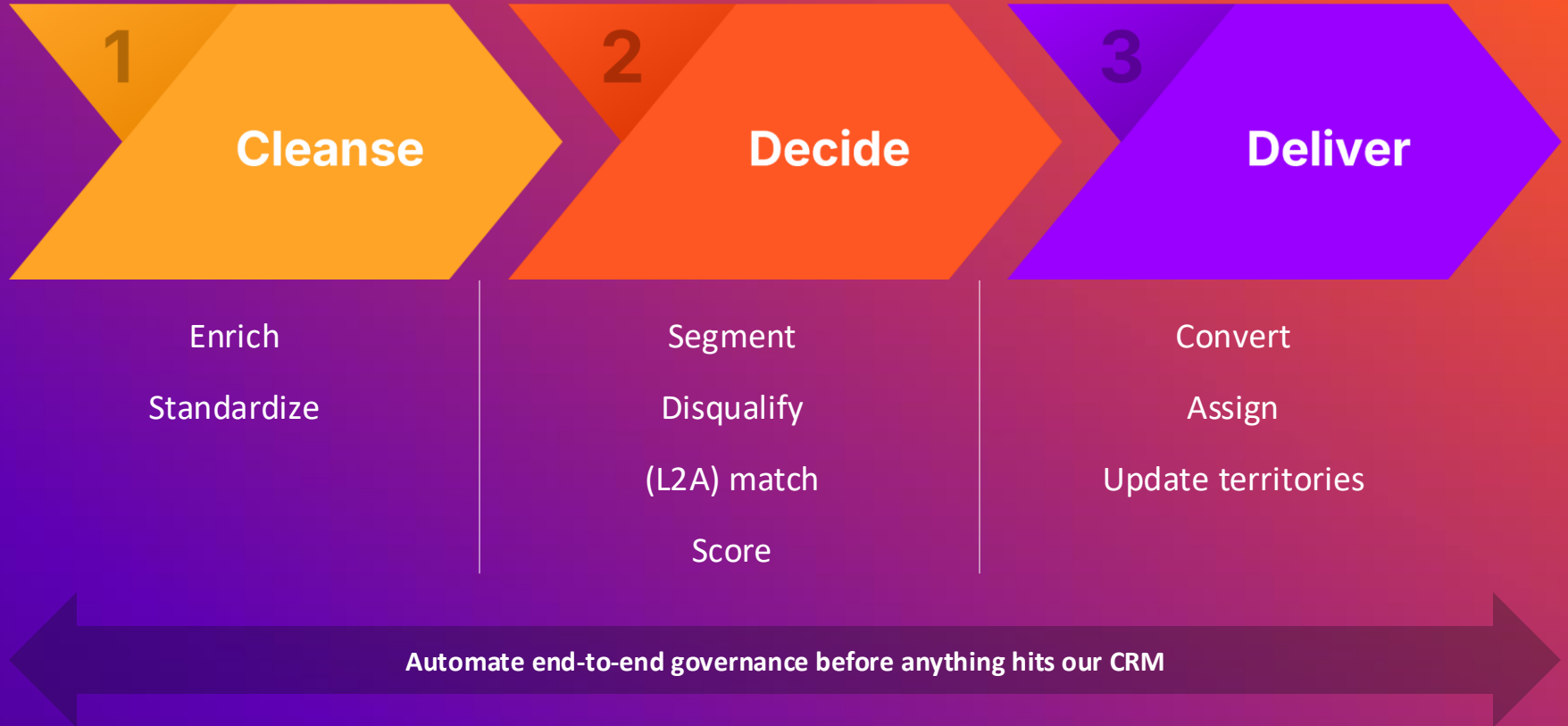
Spreadsheet

hold·ing tank

['hōl-dɪŋ 'tɑŋk] *noun*

1. A staging area where incoming leads are processed.

Blueprint. Not duct tape.

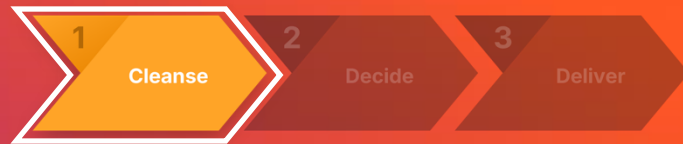


STEP 1

Enrichment & standardization: Making the records whole

Job Title	Senior Director of Marketing
Phone	(555) 123-4567
Normalized Title	Sr. Dir. of Mktg
Geo	New York, NY
Email Domain	example.com
Company Size	201-500 Employees

Title translation via Google NMT



SOURCE

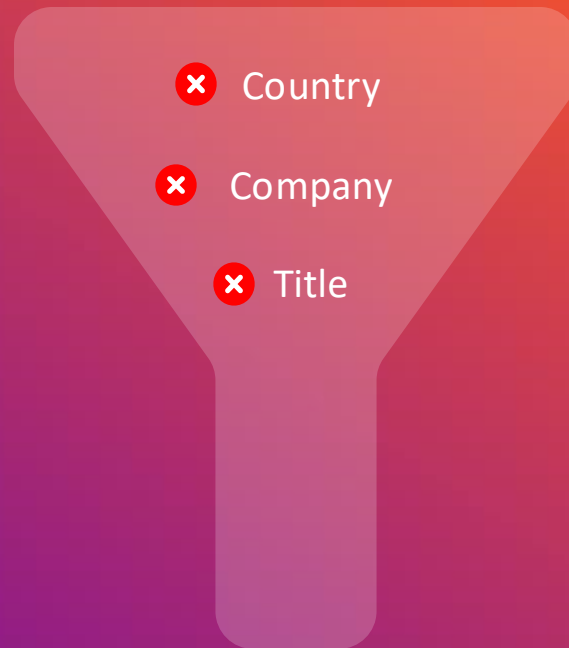
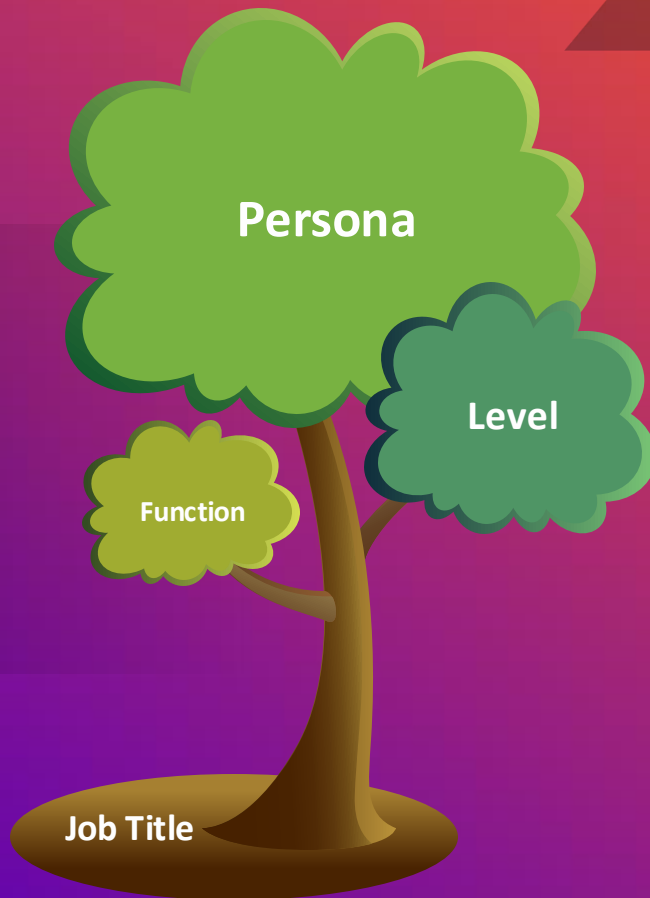


zoominfo

STEP 2

Segmentation & disqualification

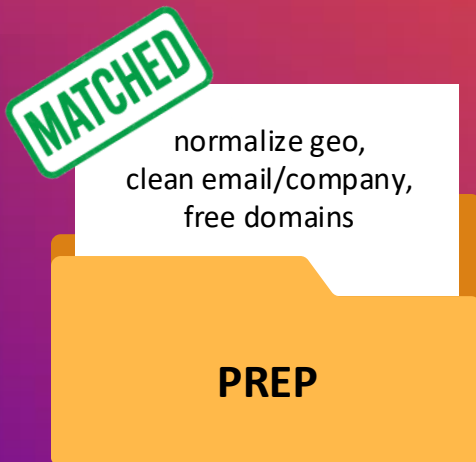
Find ICP,
Filter riffraff



STEP 3

Lead to account matching

From stray lead
to the right
account

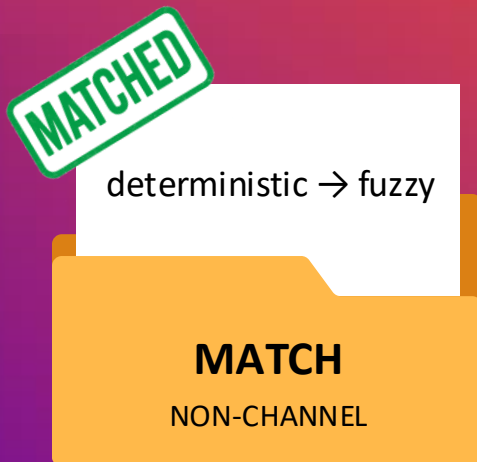


STEP 3

Lead to account matching



From stray lead
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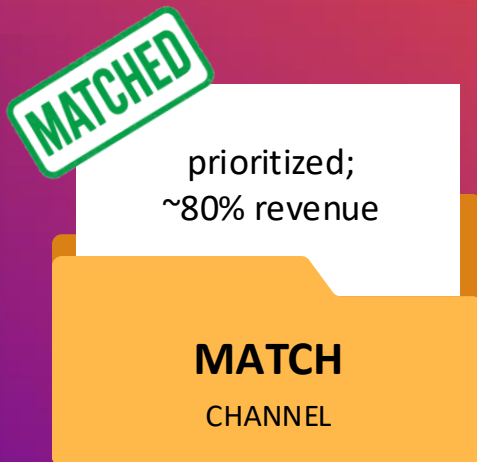


STEP 3

Lead to account matching



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STEP 3

Lead to account matching

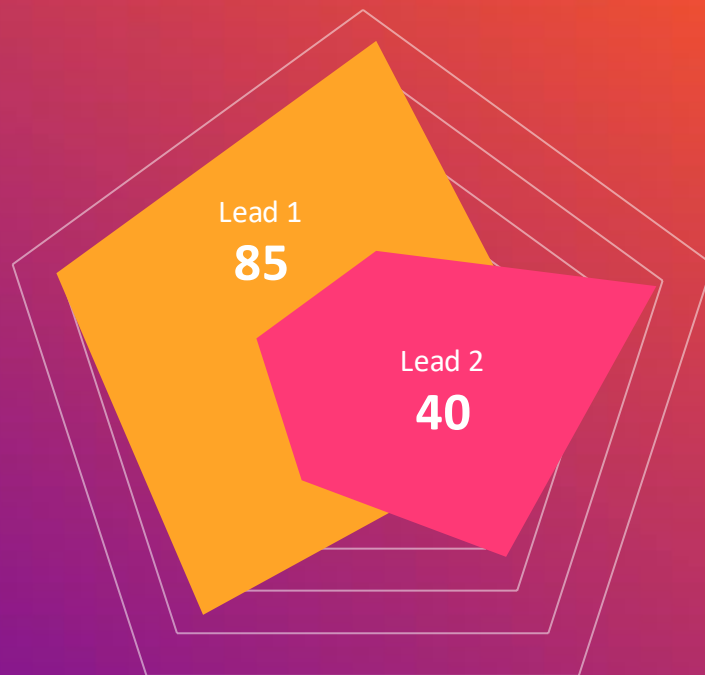
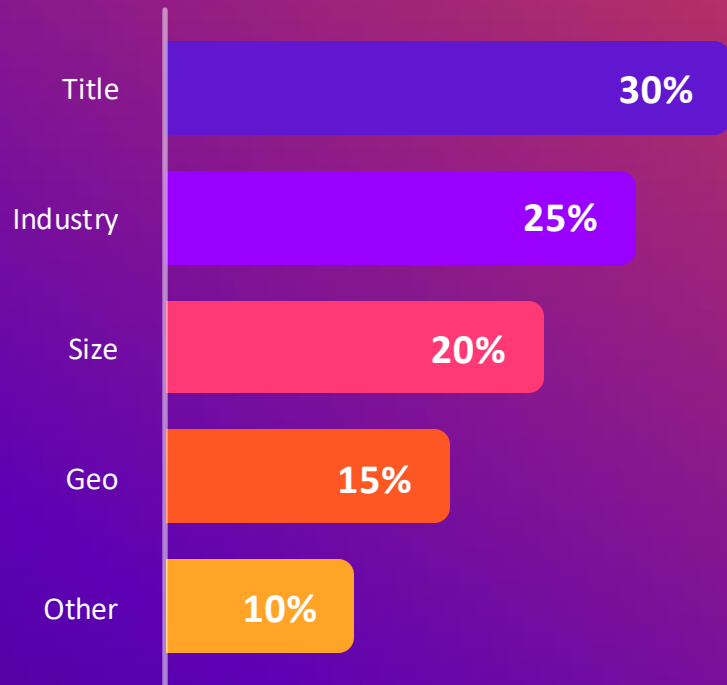


From stray lead
to the right
account



STEP 4

Fit Score: Who we should care about

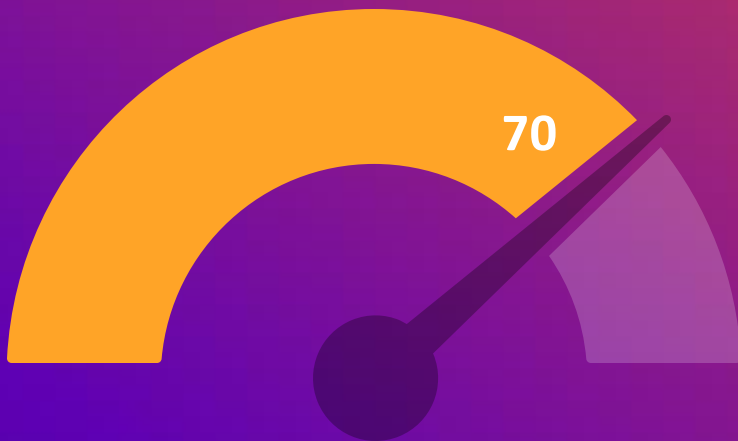


STEP 5

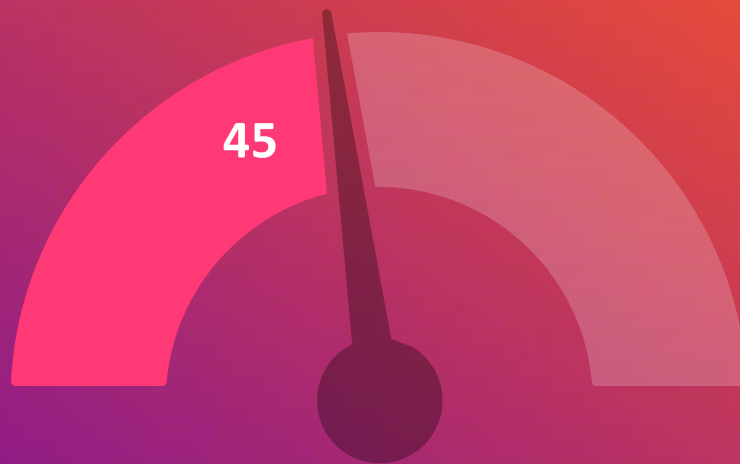
Behavior Score: Who cares about us



Lead 1



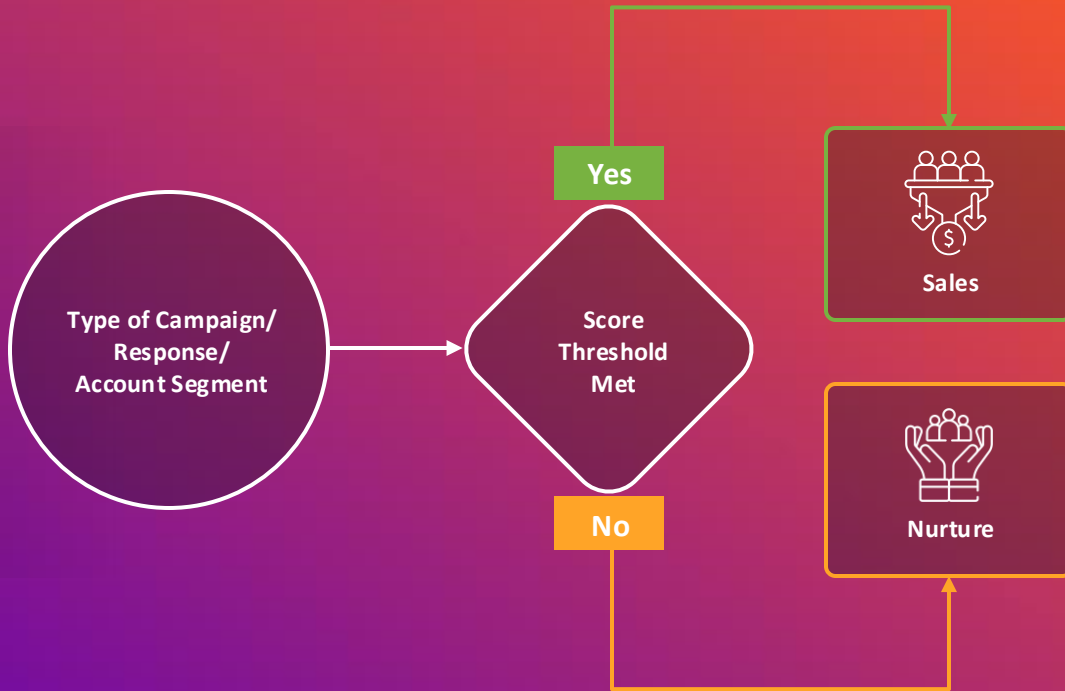
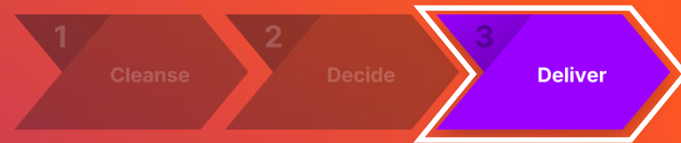
Lead 2



STEP 6

Lead conversion and assignment

Only sales-ready gets through!



Three lanes in Openprise leads intake

LANE 1

Net new

- ✓ Enrich
- ✓ Segment/filter
- ✓ L2A
- ✓ Score

LANE 2

Contacts

- ✓ Update fields
- ✓ Re-segment
- ✓ Scoring
- ✓ Route

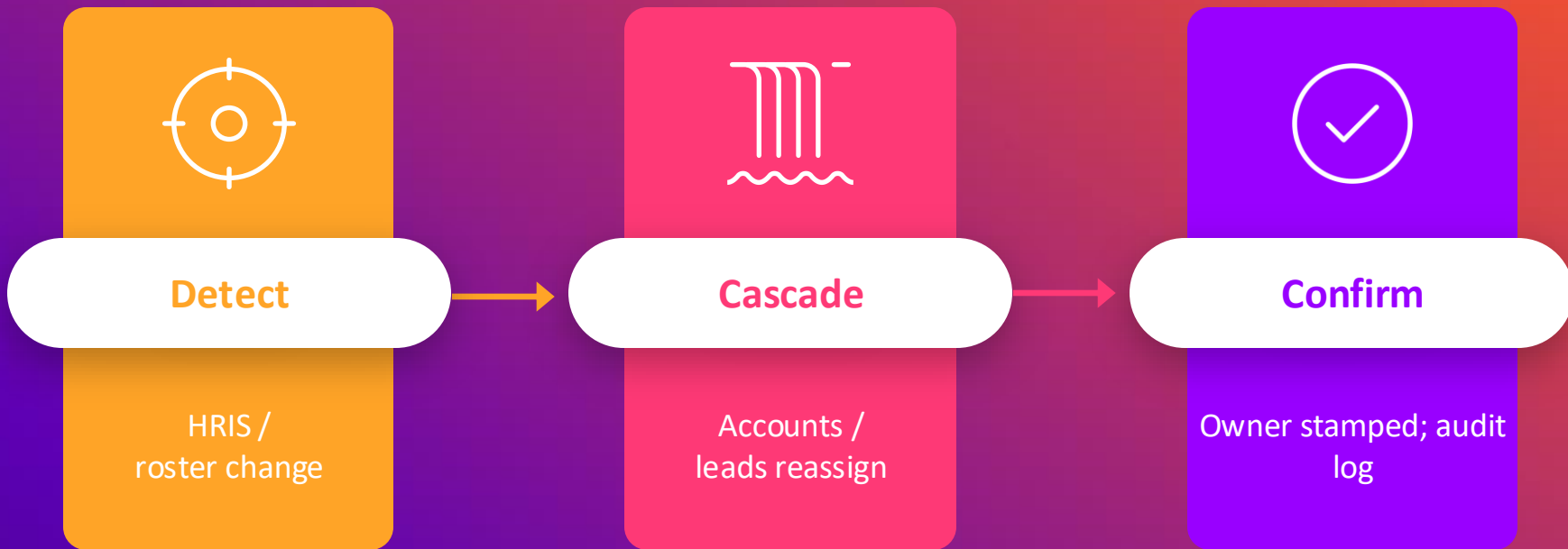
LANE 3

New responses

- ✓ Enrich/translate
- ✓ Normalize
- ✓ Account match
- ✓ Push to SFDC

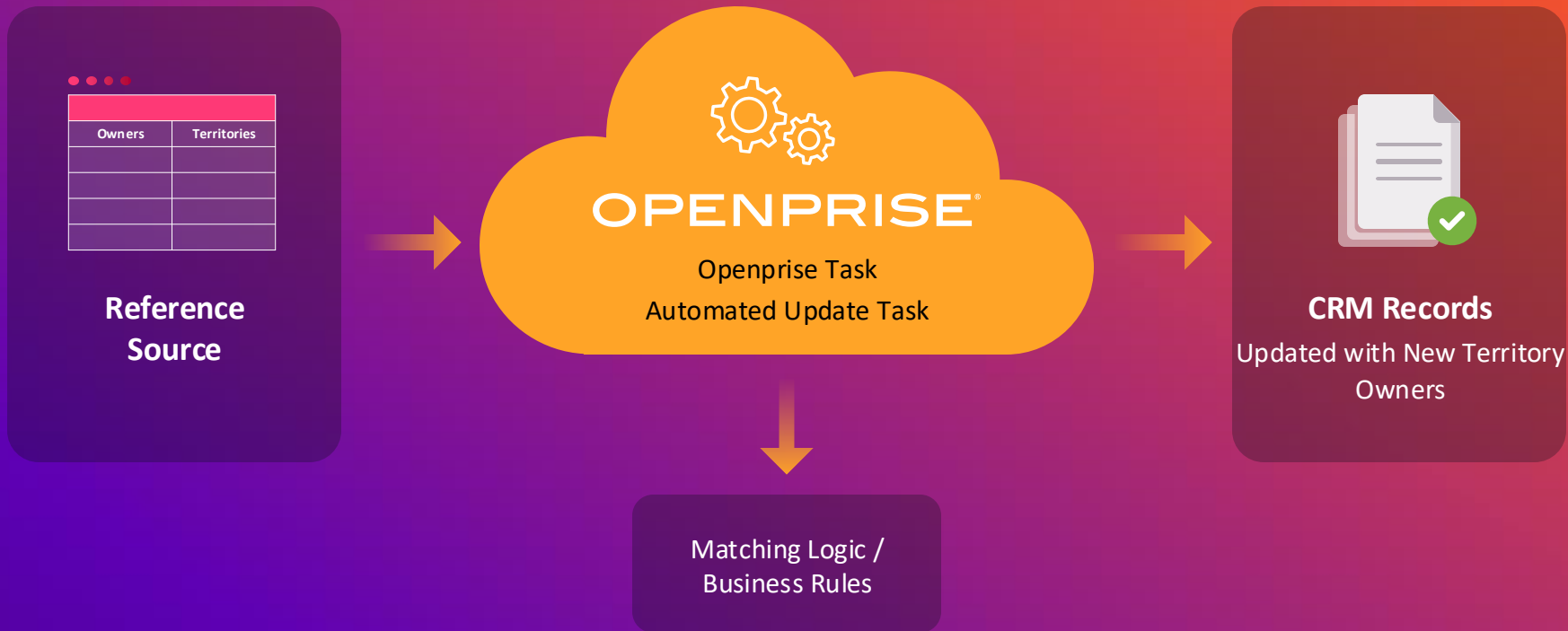
STEP 7

Territory management: Territories that update themselves



STEP 8

Territory automation: Policy > spreadsheet



What changed at Nutanix

Rep-to-record alignment

~40% → 70%

Ops time saved

65-70%

CRM clutter/junk

19%

Speed-to-lead routing

~2 hrs → 30-45 min

Lessons learned

- ✓ **Start** with normalization standards (emails, geos, titles)
- ✓ **Separate** fit vs behavioral to avoid false positives
- ✓ **Stage gates** beat “one big push”
- ✓ **Keep** competitor/junk lists regional
- ✓ **Policy tables** for territories > free-form spreadsheets
- ✓ **Always include** audit + rollback

STEAL THIS PLAN

Your 30-day budget blueprint to lead management

- 1 Define ICP/fit attributes + weights
- 2 Draft behavioral weights by channel
- 3 Normalize: domains, emails, titles, geos
- 4 Stand up disqualification + competitor lists
- 5 Pilot L2A on 10–15% segment
- 6 Convert gate + routing thresholds
- 7 Externalize territory policy + test a rep move

The background features a vibrant gradient from deep purple on the left to bright orange on the right. Large, semi-transparent geometric shapes, including triangles and polygons, are layered across the background. A thin, white, hand-drawn style oval is centered horizontally, enclosing the text.

Thank you