

ACCELERATE YOUR REVENUE ENGINE

With RingLead Route

Get ready to transform your revenue operations into a well-oiled machine.

With RingLead Route, you can effortlessly create business rules that automatically route any type of data in your system. Never again let a lead slip through the cracks in Salesforce.



File Transfer

Trigger MQL

List Upload

Form Submission

WHY INTELLIGENT ROUTING?

- Lead response time is faster.
- Account-based marketing is possible.
- Database health improves.
- Sales teams (and customers) are happier.

Salesforce lead assignment rules are difficult to manage and quickly become unreliable as you scale. CRM managers waste time manually troubleshooting issues. Out of the box, round-robin assignment isn't even possible.

The pain of not having a routing tool spreads throughout the organization. Salespeople can't find leads. Win rates plummet. Customers call competitors because they've waited too long for a callback, and Sales and Marketing blame each other.

ENFORCE SLAS

Build a company culture where "speed to lead" is respected.

With intelligent routing, you can enforce SLAs: hold marketing accountable to revenue quota and sales accountable to working leads effectively.

One Platform to Increase Speed to Lead

“With RingLead we only need 1 platform for data quality and lead routing. **Leads are now assigned much faster**, and routing is much easier to manage.



Ashley Langford

Sr. Marketing Ops at Integrate
Marketo Champion

Visual Interface + Drag & Drop Rules

“We could easily **make changes on the fly** to complex workflows. RingLead's visual interface is extremely simple to use



- Cody Bustamante

Salesforce Admin &
Marketing Ops Manager Exterro

Accurate & Fast Lead Assignment

“Since we set up RingLead, our **conversion rates have improved significantly**. Sales reps are no longer wasting time on duplicates or incorrectly assigned leads.



Juliet Forte

Marketing Ops at Kaseya



A lead that is called within minutes versus hours or days converts to a customer at an exponentially higher rate.

- Mark Roberge
CRO of Hubspot

GAIN GREATER CONTROL OF YOUR REVENUE OPERATIONS

So Many Powerful Features at Your Fingertips

Time-Based Routing

Set up time based routing using any Salesforce standard or custom field with RingLead date/time operators.

Examples Include:

Days Off or Working Hours - Select an individual in a round robin at specific day/time they have scheduled to be unavailable.

Account-Based Routing

Pre-requisite Dedupe & **Lead to Account Matching** match incoming leads against your existing dataset to determine the appropriate routing queue. **Route based off any standard or custom account field.**

Flexible Round-Robin Assignment

Create **multiple round robin pools** to support complex routing rules for leads, contacts, accounts, and opportunities.

Custom Weighting and Capping

Further customize your round-robin lead assignment by giving each user a weighting so they're assigned fewer or more leads from a queue.

Stop assigning leads to someone who is already working at full capacity or assign a smaller share of leads to new team members who are still ramping up.

Automatic Field Updates

Change data on either the record being processed or any matching record.

Visual Interface: Rule Based & Flow Chart

Design and make updates to routing criteria using **flow charts** OR with simple rules, without the need for complicated decision trees.

Batch Updates

Perform recurrent updates to maintain the health and integrity of your database. For example, a batch process can be useful for conducting **batch territory reassignments** on records owned by inactive users.

Advanced Rules Engine

Set up routing rules based on territory, industry, company size, or any other custom criteria; or set up customized round-robin routing for even distribution.

Automatic alerts and tasks

Notify & assign Salesforce task to reps when action is required. For example, notify a sales rep's manager if there is no activity on an assigned lead within 24 hours.

Routing Log & Activity Reports

Easily monitor and improve your lead distribution process with activity reports and one easy-to-view dashboard.

Re-Routing & Backup Ownership

Create custom criteria to re-route leads, for example re-route a lead if a SDR doesn't take action during a certain period of time. Also, add an extra layer of protection, a **backup owner** can ensure no lead goes unanswered.

Triggers & Multiple Endpoints

Customize any lead or account activity to trigger a lead to be assigned to a routing workflow.

Salesforce triggers are compatible with other 3rd party triggers and do not cause any performance degradation

Marketing Automation Integration

Connect your whole martech stack and streamline the flow of information in your marketing systems and Salesforce. Setup is easy.

Opportunity Routing

Easily implement rules that trigger opportunity routing. Develop criteria that auto-creates opportunities, updates specific opportunity fields and notifies owners of new opportunities assigned to them.

Pre-Requisite Orchestration

Ringlead orchestration processes solve common data problems that obstruct and cause dysfunction in routing workflows. **SEE NEXT PAGE -->**

ONE PLATFORM TO POWER YOUR ENTIRE DATA INGESTION PROCESS

More than just routing: Automate Data Quality & Lead Routing in a single flow

RingLead Data Orchestration Platform

- ✓ **Enrich** critical data points on incoming leads such as job title & company size to streamline routing and ensure sales reps have the information they need to quickly follow up. Integrate any 3rd party data vendor.
- ✓ **Normalize** data values to a standard taxonomy (i.e. New York = NY) to ensure the format of incoming data complies with your routing and external systems.
- ✓ **Segment** your data into clear buyer personas, sales territories, scores, and more. (Job Role, Industry, Territory, etc) to enable easy territory planning & assignment.
- ✓ **Dedupe** incoming leads to prevent duplicates from wreaking havoc among your sales and marketing teams.
- ✓ **Match Leads to Accounts** to make account-based marketing a possibility by showing lead data in the context of prospect accounts
- ✓ **Propensity Scoring**
Use any combination of data points to define scoring models for leads and accounts.

40% of businesses fail to achieve their objectives due to poor data quality

- Gartner

Robust Data Ingestion

Effective Routing is Dependent on Complete, Clean & Uniform Data

Legacy routing systems are fragmented across disparate point solutions. It creates bottlenecks and ultimately slows down leads from getting to salespeople.

An intelligent routing strategy requires robust technology that enriches, normalizes, dedupes, matches leads with accounts, scores, and segments customer data as it enters your database(s).

Everything you need to increase speed to lead

The RingLead Data Orchestration Platform combines all data management processes into a single command center to ensure data is routed as fast and accurately as possible.

An all-in-one platform gives you everything needed to implement an intelligent routing strategy that accelerates your revenue engine. RingLead's real-time data quality & data orchestration processes can be applied across any source of data entry or any trigger.

CASE STUDIES:

See how power-users set up unique routing workflows. Utilize user-built templates to enable distinct GTM motions.

SEE HOW **KASEYA**

Set up routing and lead to account matching workflows to enable a land & expand Go-To-Market strategy



WATCH CASE STUDY



Before RingLead, we **lost revenue** because marketing-generated leads were not followed up on due to incorrect routing.

By setting up RingLead, we've **increased our conversion rates** because leads are now assigned accurately and quickly. Also, our **workflows are now optimized to support our Go-To-Market motions**.



- **Juliet Forte**
VP, Marketing Ops at Kaseya

SEE HOW **INTEGRATE**

Used RingLead to enable Account Based Marketing, Increase Marketable Database size, Maitain GDPR Compliance, and Increase Conversion Rates.



WATCH CASE STUDY



Before RingLead, we used multiple providers to manage duplicates, data quality, segmentation, and lead routing.

Consolidating into a **single platform & flow step** makes our Salesforce & Marketo so much more effective. Of course it reduce costs, but the overall **improvement of data quality & processes has an invaluable impact on our organization and marketing to sales handoff**.



- **Ashley Langford**
Sr. MArketing Ops Manager at Integrate

SEE HOW **EXTERRO**

Accerated acquisitions & expanded into new markets by setting up segmentations, account matching, and multiple routing workflows.



WATCH CASE STUDY



RingLead is the only solution that allowed us to cancel all of our Process Builders and manage our data ingestion process with a single trigger - from segmentation to routing, and so on.

This allows us to **support multiple go to market motions**, as we can easily manage multiple complex routing strategies for different markets and products without a lag on our system.



- **Cody Bustamante**
Salesforce & Marketing Ops Manager at Exterro

BECOME A DATA HERO

Turn your company's Salesforce into a Revenue Engine

SEE HOW ALTIUM

Set up Lead to Account Matching & Deduplication to enable account-based marketing, faster lead follow up, and increased conversion Rates.

“ RingLead **Lead to Account Matching & Dedupe** accelerated our sales cycle which had a **direct impact on our pipeline and revenue growth.**

Sales is no longer wasting time on duplicate leads or calling leads at customer accounts.



- Iryna Zhuravel
Head of Growth at Altium
2 x Marketo Champion

SEE HOW COCKROACHDB

Set up set real time deduplication and standardization to ensure fast and accurate lead assignment.

“ I am honestly much better at my job because of RingLead

Before RingLead, I had to spend entire days manually re-routing leads that were incorrectly assigned.



- Nick Lauricella
Marketing Operations
Manager at CockroachDB

SEE HOW TRADESHIFT

Set up real-time deduplication and enrichment workflows to enable a robust routing strategy

“ Before RingLead, lead routing wasn't going as expected because we were missing the information we needed for our routing to work.

With RingLead, we can fill in missing data, normalize, and dedupe in a single flow - this is so important to enabling our sales team to quickly follow up & have informed interactions with prospects.



- Mari Miyamoto
Product Manager, Internal
Systems at Tradeshift

SEE HOW MCG HEALTH

Set up sets up Bulk Updates and Lead to Account Matching task to manage their territories and enable robust territory based lead assignment.

“ RingLead's Mass Update feature allows me to easily make bulk changes to re-assign territories.

I can click a few buttons to update thousands of records in a few seconds - it's awesome.

We used to have to do this with Salesforce Data Loader which was extremely slow and cumbersome,



- Bryan Vaughn
Director, Sales Operations
at MCG Health

SEE HOW DATTO

Replaced Marketo native functionalities to expedite and optimize their lead assignment process.

“ RingLead improves our overall customer experience and enables us to accurately report on multi-touch revenue attribution.

RingLead also **fixed our Routing** that was previously bogged down by standardization campaigns in marketo and poor data quality.



- Dory Viscogliosi
Marketing Compliance
Program Manager
Amazon Web Services

INTUITIVE UI TO ENABLE AGILE TEAMS & MULTIPLE GO-TO-MARKETERS



My favorite thing about RingLead is the **ease of use** and simplicity of Rule-Building.

They do have a flow chart feature, but they also have a simple rule-based set-up that is much easier to look at on a larger scale.

I can just update the one rule I want to correct without having to see everything at once.



Cody Bustamante

Salesforce & Marketing Ops Manager at Exterro

The screenshot shows the 'Northwest SMB' rule configuration page. At the top, there are tabs for 'No Match', 'Lead Match', 'Contact Match', and 'Account Match'. A search bar and '+ ADD NEW RULE' button are on the right. The rule name is 'Northwest SMB'. Below is a 'Criteria' table:

Field	Operator	Value
Territory	is	Northwest
Employees	is less than	250
OR		
Company Revenue	is less than	25000000
Territory	is	Northwest

Buttons for '+ ADD OR DIVIDER' and '+ ADD CRITERIA' are at the bottom. Below the criteria is a 'Fields to Update' section.



Our previous routing platform's flowcharts became **overwhelming** - and eventually stopped working with all the changes happening at our organization.

RingLead provides a much more intuitive user interface that makes it much easier to manage our territories and account matching rules.



Ashley Langford

Sr. Marketing Ops Manager at Integrate

The screenshot shows a routing flowchart titled 'Geographic Territory Assignment'. It starts with a 'START' node leading to a 'No Match' node. A decision diamond 'Northwest SMB' branches into 'Yes' and 'No'. The 'Yes' path leads to a 'Field updates' box (No field updates), then 'Set Owner', 'Route using Round Robin' (Northwest SMB), and 'Send Notification'. The 'No' path leads to another decision diamond 'New Rule Overlapped', which also branches into 'Yes' and 'No'. The 'Yes' path leads to a 'Field updates' box (No field updates), then 'Set Owner', 'Route using Round Robin' (None), and 'Send Notification'. A sidebar on the right shows the criteria for the 'Northwest SMB' rule, matching the screenshot above.



Before RingLead, we used Distribution Engine, which is very rigid and required code that we needed to pay to maintain and update. We couldn't quickly make changes when we needed to.

RingLead is much easier to use and allows us to quickly made updates when changes happen at our company.



Julie Forte

VP, Marketing Ops at Kaseya

The screenshot shows the 'Segment Configuration Settings' page for 'NAICS to General Industry'. It includes a 'Segments' section with a '+ ADD NEW SEGMENT' button. The 'Accounting Services' segment is selected, showing its 'Segment Name' and 'Segment Output Value'. Below is a 'Rules' table:

Segment Label	Operator	Input Values
NAICS	is	541213, 541214, 541219, 541210

Buttons for '+ ADD OR DIVIDER' and '+ ADD SEGMENT RULE' are at the bottom.

TAKE THE NEXT STEP

Toward Innovating Your
Sales and Marketing Operations!

Download the **Intelligent Routing Strategy eBook** for more details on RingLead Route, real-world routing scenarios, and buyer guidance. You'll learn how to design your own intelligent routing strategy and make account-based lead assign your competitive advantage.

**Or contact us now for a demo with
one of our data orchestration advisors**

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