

THE ONLY LEAD DISTRIBUTION GUIDE YOU'LL EVER NEED



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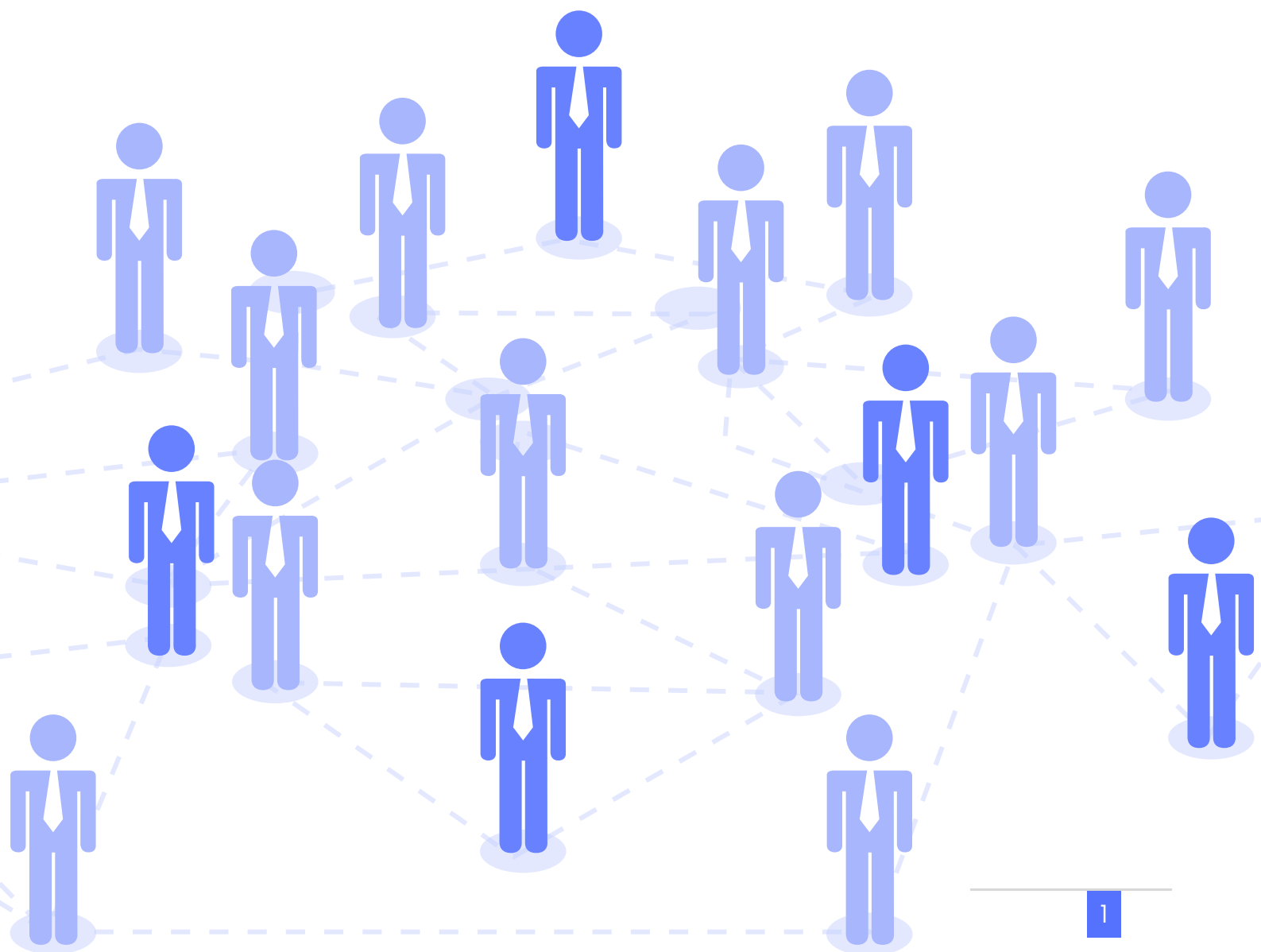
Lead routing has become one of the most crucial applications of the sales tech stack. The trend has been rapidly growing for the past few years especially for businesses whose sales teams and go-to-market strategies are constantly evolving and growing.

The traditional way of assigning leads is flawed in many ways. It is inefficient and leads to significant downfalls for the business.

If you have a fast growing sales team, it is essential for you to adopt advanced lead routing processes. Adopting automated lead routing can make the most significant change in your metrics. You'll hit some never-seen-before conversion rates, deal sizes, and watch your happy customers grow.

In this extensive and powerful guide, you'll get to understand everything you need to know about advanced lead routing strategies.

We've analyzed some top trends and hacks that top sales ops are adopting in the space of lead assignment and curated it into an easy-to-digest yet in-depth guide.



What is Lead Routing?

Lead routing is the process of assigning leads across your sales team. This process can either be manual or automated based on certain criteria.

Your demand generation and marketing teams are generating leads from many different channels and leads need to be assigned to reps with the right priority and at the right time to ensure maximum results.

Automated assignment is almost always better. Taking an automated approach for lead routing can reduce the time taken for follow-ups and drastically increase your conversion rate. But it is surprising how many teams still have a manual way of assigning leads.

Inefficiencies in the Lead Routing Process

Manual Assignments

It is surprising that a lot of companies still rely on manual lead assignments. The most common reason to support it is that the lead volume may not be a lot on a day-to-day basis.

However, this reasoning is flawed. Lead routing should almost always be automated. If you are manually assigning leads, you are wasting time and also creating unnecessary friction in your Sales cycle.

Leads should be assigned to the right rep as soon as they come in to your CRM.

Not all Reps are the Same

Acknowledging the fact that not every sales rep is the same can entirely transform your perspective towards lead assignment.

Every sales rep has different skill sets, experiences, and knowledge. Your sales reps would have different inclinations and approaches to sales. A sales rep who has closed deals in a particular vertical or industry is more likely to close future prospects with the knowledge and stories they have from closing previous deals .

So, assigning all leads in a round-robin fashion may not be the most profitable option always. It could also depend on experience. If you assign your highly valuable leads to the more experienced reps, then you're bound to close more deals than you are doing now.

Not Every Lead is the Same

Like not all reps are the same, not every lead is the same.

Unless you cater to a very specific niche, your leads will come from different regions, accounts and fall under different use cases.

Lead segmentation becomes crucial for identifying quality leads based on lead source, company size, product, usecase or geography.

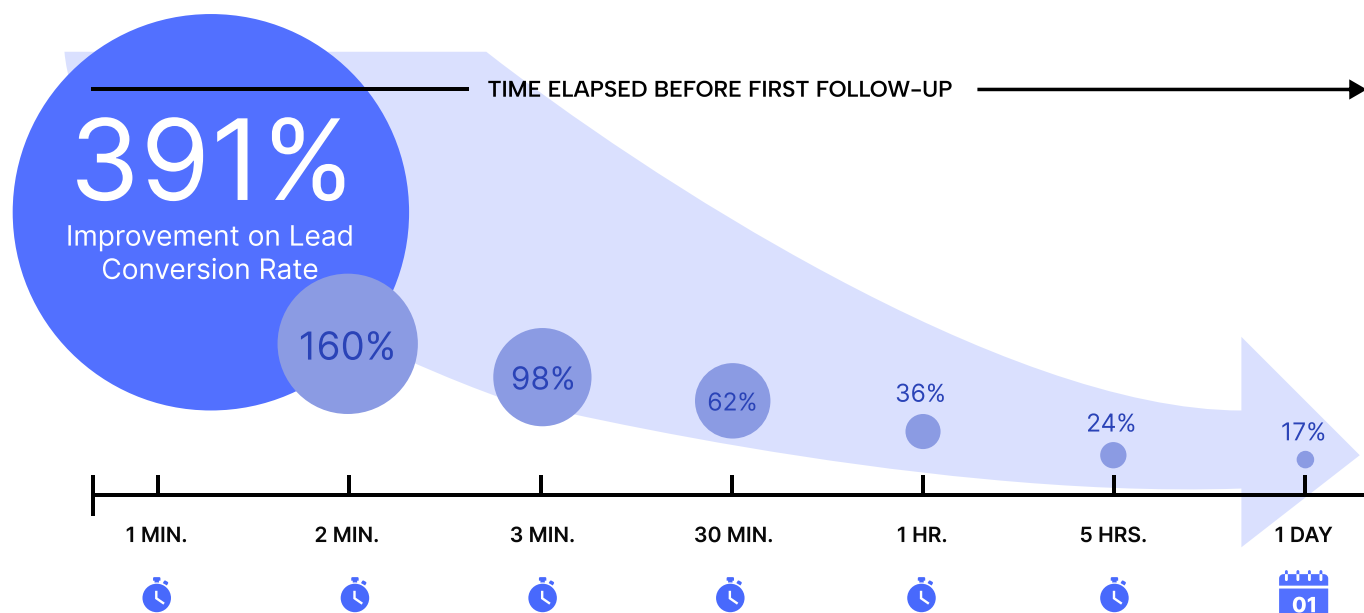
Segmentation lets you bucket and prioritize leads into different categories which can then be used to handle leads differently.

High priority leads or leads with a bigger deal size can be assigned to reps based on performance.

Slower Follow-ups can Drastically Reduce your Conversions

One of the most shocking facts related to sales is that the average B2B business's lead follow-up time is 42 hours. According to a HBR study, leads should be responded within 5 minutes for the highest chance of qualification.

An average buyer has already done their research and shortlisted vendors before they contact your company. Any delays in responses impacts conversions as other vendors may have already responded to the lead.



You can set Service Level Agreements for your team so that lead follow-ups are measure-able and happen within a defined time.

Every sales rep has different skill sets, experiences, and knowledge.

Your sales reps would have different inclinations and approaches to sales. This can be based on the tasks they have been assigned so far and their industry knowledge.

With Service Level Agreements (SLAs) in place, you can ensure maximum speed to lead. The key to lower lead response times is to have highly efficient lead routing workflows in place.

Scaling your Sales may feel like a Nightmare

If your GTM strategies are evolving, you might be looking at adding more reps in your lead flows. Using an efficient, automated approach, you can add reps to your round robin flows and start assigning them leads on the same day!

Also, with growing GTM strategies, you may have to lean towards an account-based selling mechanism. Getting your sales admins to change Salesforce assignment rules may take a long time and may be prone to numerous errors.

Using an automated lead routing solution, you can easily modify your lead flows to accommodate more complex lead assignment rules using an easy-to-use visual canvas. You can pause lead assignments for reps when they are on vacation and handle everything in an automated way.

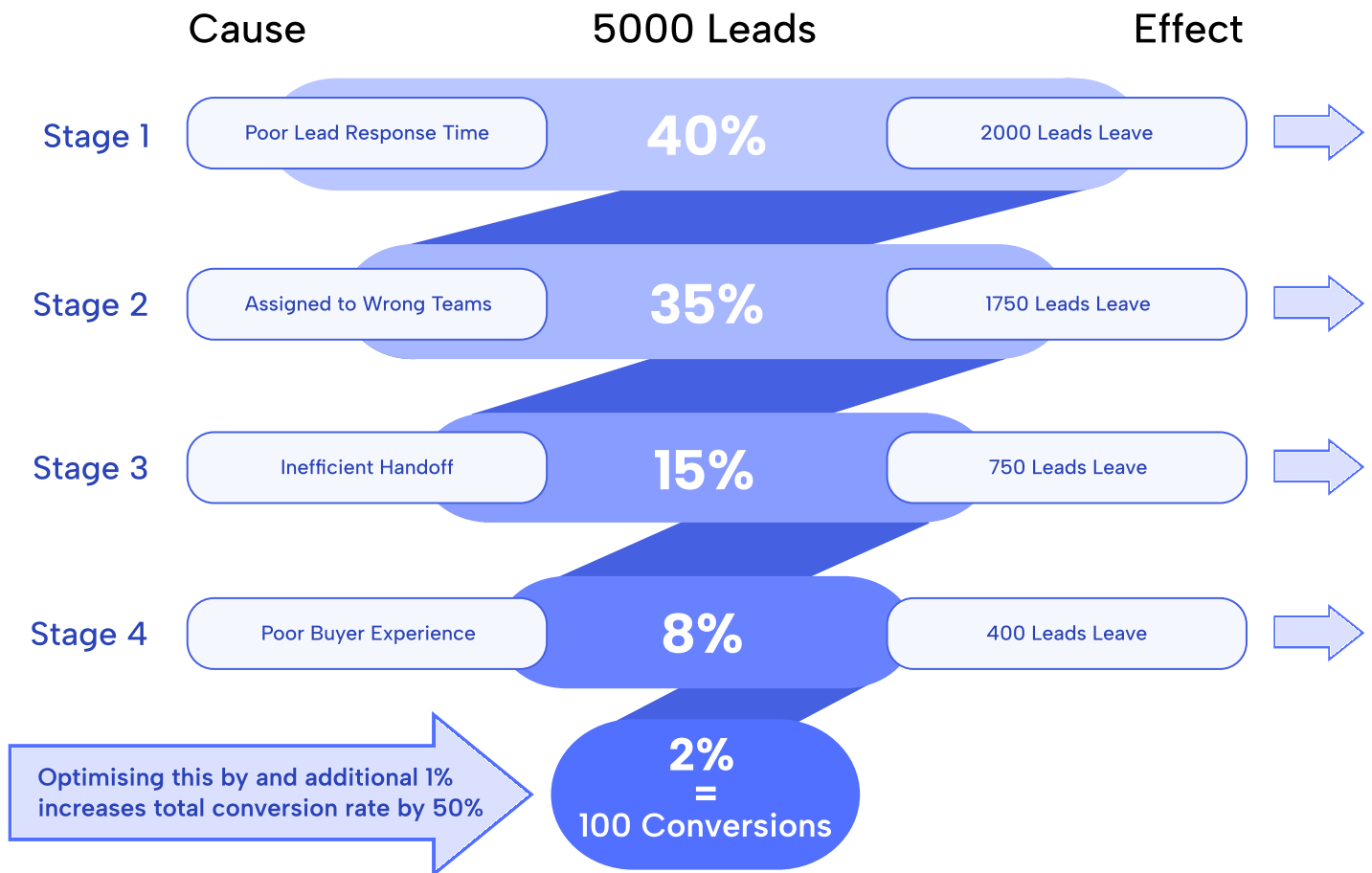
Many leads are Probably Getting Stuck in the Cracks

Improper lead management and lack of automated lead assignments can leave your leads orphaned or unattended. Your leads may go cold sitting in rep buckets because your reps don't think the lead is important. This might be happening because of cherry-picking of leads by your reps.

If you are using Salesforce's lead assignment rules then you would be missing out on tracking capabilities that will help you track leads.

Using an automated tool that is specifically designed for lead assignments, you can set up the perfect alignment with your sales teams on high value leads.

You can set up SLAs for all your high value leads so that your team knows how fast to respond to them. Manual errors may creep in, and a lead or two might get stuck in the crack in between processes. This, when compounded over time, can lead to huge setbacks in conversions.



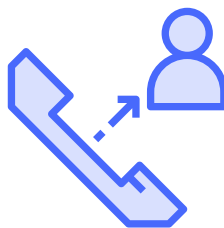
Misalignment Between Marketing and Sales Teams

One of the primary needs for an optimized sales process is the need for alignment between the marketing and sales teams.

With no good lead routing rules, no set objectives, and lack of alignment between MQLs & SQLs, you may be looking at an inefficient sales process.



Poor sales productivity and marketing ROI costs companies **\$1 trillion** a year



Only **27%** of MQLs are followed-up by sales



Only **30%** of businesses make marketing and sales alignment a priority

Over time, you'll see no improvement in your metrics. So it is important that both marketing and sales are aligned on what leads are important and how fast should the response time be for such leads.

How can Automated Lead Routing Boost the Performance of your Sales Team?

A more dynamic approach to lead routing can be a perfect win for everyone – sales teams, marketing teams, and customers. No wonder high-growth businesses with complicated sales and marketing teams are adopting these techniques.

Move Away from the Traditional Round-Robin Lead Assignment Mechanism

Salesforce lead assignment rules, though great for smaller teams, limit the ability to scale for fast growing teams. It can be a significant factor responsible for your sales teams' inefficient functioning.

The hard truth would be that your sales reps are underutilized, and your leads are not getting nurtured well. If you are simply using a round-robin approach, things have to change now.

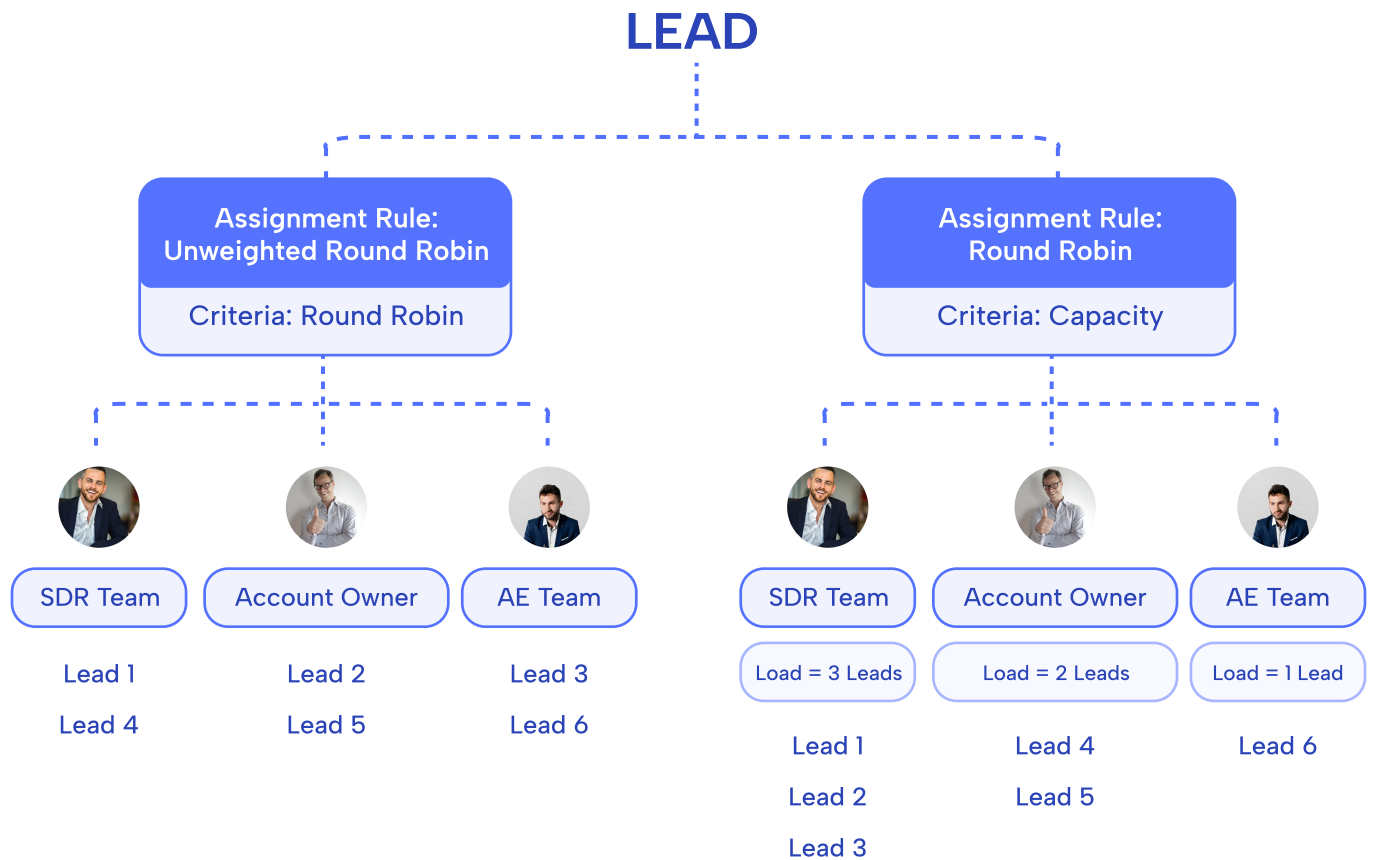
A simple example would be an example of a SaaS business' sales process. SaaS businesses will most likely have various buyer personas and different use cases. Based on the company size, the lead scores would vary.

Similarly, some of your sales reps may be more skilled and adept in a use case or an industry more than the others.

Considering all these factors, assigning leads based on their availability can be a huge bottleneck for your sales team.

The harsh truth is that your sales reps are underutilized and your leads are not getting nurtured well if you are using just a round robin approach.

Things have to change NOW!



So, try to go about more advanced lead routing mechanisms that bring all these factors into the picture. Some of them being location-based, use-case based, industry-based, and lead score based. Let's discuss these criteria in the next section

Define your Lead Routing Criteria Based on your Sales Goals and Business Needs

Dynamic and automated lead routing rules can transform sales ops to drive high performance using the same sales team. Every sales rep of yours would be working at their best, and you'd be closing deals at a much faster rate.

There can be various dynamic rules for your lead routing process. The criteria would be entirely based on your business' needs and goals.

Geolocation-Based Lead Routing

If you are from a brick and mortar industry, then segregating and routing leads based on geographic locations can be highly beneficial. Your sales reps can be categorized based on territories they would handle, and the leads can be assigned accordingly.

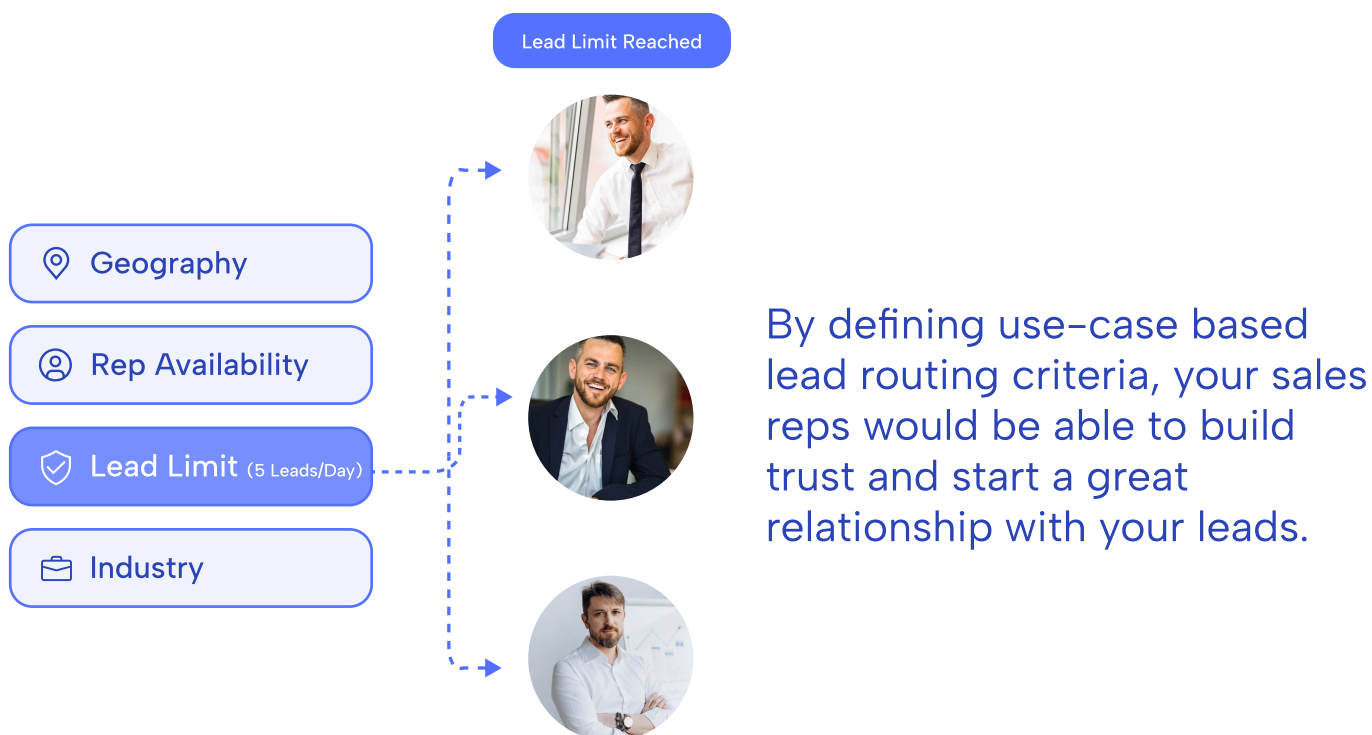
This way, the chances of leads getting overlapped between two reps would be unlikely, and your data will look much cleaner. This criteria for lead routing is relatively easy to define and create workflows for.

The leads can be assigned to the right reps based on their CRM data that indicated their location. If you have multiple reps for the same location, you can further use another criterion from this list or even a simple round-robin fashion for assigning leads to reps.

Use-Case or Industry-Based Lead Routing

Many businesses have multiple use-cases and industries to cater to. For instance, a CRM application can have numerous use cases and may cater to various kinds of industries. For such cases, using this as a criterion for lead routing can make your sales process more effective.

Some of your sales reps would be specialized in managing a certain kind of industry-based leads better. This might be because of their prior experience in handling these use-cases, or it can also be based on their expertise.



Your reps wouldn't spend time looking for content or information for the lead as they will already be prepared for what is to come. Hence, you'll see a dramatic improvement in your conversions.

Lead Score Based Routing

Advanced sales models implement lead scoring as part of the lead routing process. Lead scoring is the process of assessing the value of your leads by assigning a quantifiable value. The score indicates the likelihood of conversion of the leads.

Lead scoring involves multiple factors. These can be based on certain attributes such as engagement with your brand, use-case, company size, and other attributes that can help you evaluate the likelihood of closing a deal with the lead.

Leads with higher scores can be prioritized by increased engagement, attention, and customization. The same effort can be made up for by reducing these aspects while engaging with leads with lower scores.

Your best performing and experienced sales reps can take over leads with higher scores in fewer quantities. The other leads can be distributed across other reps with lower priority offered to them.

Such a lead routing mechanism will help you qualify high-quality leads and nurture them to fit their exact expectations.

This will ultimately lead to an extremely powerful sales process leading to a huge bump in your revenue.

Value-Based Lead Routing

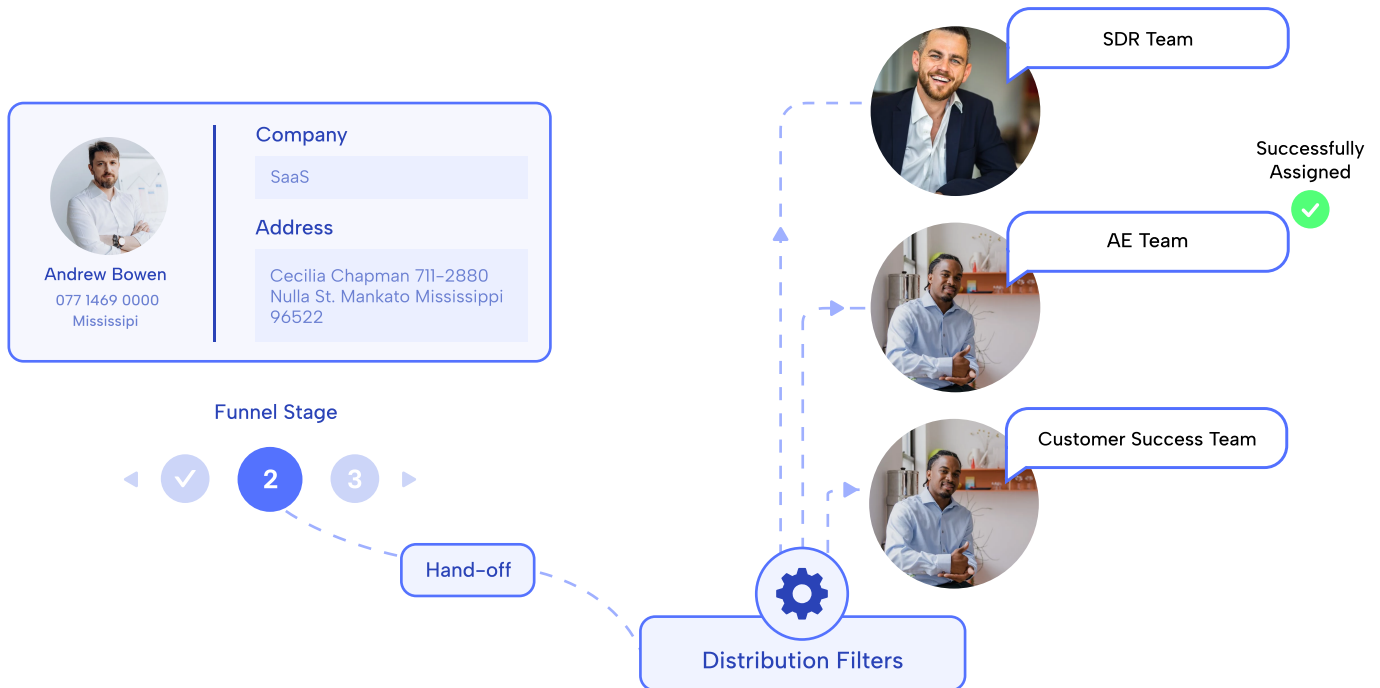
If your range of quality of leads varies widely, then having a value-based routing system may help. Not every lead has to go through your highly-qualified sales reps.

Some leads can even be closed through a self-serve marketing automation sequence where you can route all the lower value leads. This self-service automation sequence can work as your high-volume and one-to-many sales model.

A value-based routing approach will help you save one of the most precious resources of sales ops, which is the sales reps' time. Such an approach can work brilliantly for businesses with multiple buyer personas with different deal sizes.

Account-Based Lead Routing

Account-based lead routing works excellently with an account-based marketing approach. In an account-based marketing model, your sales reps would be working closely with certain accounts.



Many of the incoming leads may be a part of these accounts, and thus, matching them to the right account is crucial. This will lead to cleaner data and increased efficiency in your sales process. Automated lead routing rules can help you automate the process of lead-to-account matching.

Your best performing and experienced sales reps can take over leads with higher scores and the other leads can be distributed across other reps with lower priority till they ramp up

Set up Workflows and Automate your Lead Assignment

After you are clear on the criteria for lead routing, you should set up automated workflows for the same. You can do this by building lead routing rules through workflows.

This will put your entire lead routing process in an auto-pilot mode so that your sales reps can focus on the most important task at hand – connecting with leads and closing deals.

Effective lead routing tools can integrate it seamlessly with your Salesforce CRM natively, and the tool will route leads in real-time.

Here's what PowerRouter can help with:

Accurate, automated lead routing based on dynamic assignment rules through a visual canvas

Segment and route (round-robin) based on geo, skills, territory, lead source, availability

Auto-Match leads to target and customer accounts

Increase speed to lead with SLAs in place

Add, remove, manage reps with absolute ease

Analytics and metrics to identify bottlenecks

Based on the rules you've set, PowerRouter will assign leads to the right person to improve your speed to lead drastically.

Scaling your sales team to fit your business needs wouldn't be a problem. You can add more reps and update your lead management process. Even when a rep is not available, automated lead routing will auto-assign the hot leads to the reps who are available based on the rules.

Modify Lead Routing Rules Based on Changing Requirements

As your business grows and the GTM process evolves, you'd have to frequently change your lead routing rules to occupy the new objectives.

For example, if you are already following location-based lead routing criteria, you may find the number of leads and reps for each location growing

exponentially. So much so that the round-robin mechanism to assign reps to leads within a territory might not be the most effective.

For such cases, you might want to filter the process even further by having a lead score for each location or load balance leads for different reps. This may seem like a challenging task for a traditional lead assignment approach.

Marketing teams might change their GTM strategies, so you might want to switch to account based selling where leads are matched with the right accounts to ensure maximum conversions.

Using an automated lead routing model, modifying rules to add more routing criteria will be quite easy as compared to the manual approach. Modification of rules can have some amazing benefits such as easy scalability, less complexity, and cleaner data for lead management.

Reduce Lead Response Times Using SLAs

High lead response time is the most prominent factor that impacts the productivity of sales teams across many businesses.

Higher response times, when compounded, can mount up to massive setbacks in the growth of your conversion rate and revenue.

Hence, this is something that must be catered to. The best way to reduce the lead response times is to implement automated Service Level Agreements (SLAs) in Salesforce.

Automated lead routing, when combined with SLAs, can make your sales ops super-powerful.

An SLA typically takes effect when the lead is handed over from the marketing over to the sales team. With SLAs set up, sales reps will be held accountable for conversing with the leads and moving things forward.

SLA can be customized based on your needs. For example, the time based on the change of lead status can be monitored. From the time when the lead gets routed to the time when the lead status is changed to say “engaged” or “unqualified” can be tracked.

You can have multiple SLAs in place based on the complexity of your sales model. If you have been looking for ways to reduce speed to lead your sales reps, then SLAs are something that you must consider.

Align your Goals with Marketing Team

One of the biggest reasons for inefficient sales processes is the disconnect between sales and marketing teams. This misalignment leads to incorrect lead routing and increased follow-up times.

For bringing your sales and marketing items back into sync, you can start by analyzing your current state. This can be done by analyzing the current metrics and identifying the bottlenecks in the model.

Next, you can set up routing workflows by keeping in mind the objectives and KPIs of both marketing and sales teams. Having a customer-driven approach here will help nurture your leads better and offer a better experience to them.

Alignment between MQL and SQL definitions is also an essential factor to consider.

Once you've streamlined the goal and removed bottlenecks, you can ensure that there is no conflict of interest between the two teams.

Signing SLAs between both the teams can help resolve any conflicts. With this system in place, your sales and marketing teams will perform at their best and work towards common metrics.

Define and Track Important Sales Metrics

Measuring your sales team's performance is of course the last piece to the puzzle. After you've optimized your sales process through automated lead routing, you should ensure that there is a steady growth in the growth of your business.

The first step before you begin is to define the metrics you would want to track and improve. This will be dependent on the bigger goals and vision of your business. You should also bring in the metrics that are specific to sales ops.

Here are some examples of the metrics that you can define and track:

Lead velocity

Conversion rate

Product performance

Sales velocity

Sales per rep

Sales by region

Lead response times

Average deal size

Customer satisfaction index

Keeping track of these metrics and identifying obstructions can help you accelerate your sales team's performance to never before seen heights.

Conclusion

Changing market dynamics and constantly evolving GTM strategies have made lead routing an absolute necessity for most organizations.

Inefficient, manual lead assignment systems can lead to many bottlenecks in your sales process, leading to unproductive use of your sales reps' times and unhappy customers.

Having a contemporary, automated lead routing system in place can be transformational to your organization's growth, to say the least.

No wonder top organizations are quickly adapting to this process, and you should too if you want to find yourself amongst the most optimized sales ops teams!

www.powerrouter.io