

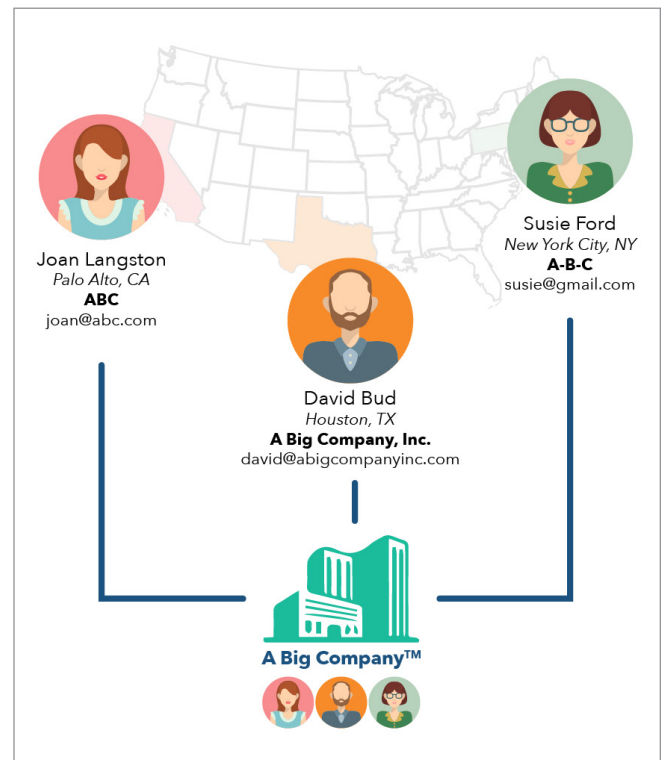
A Match Made In Salesforce

LeanData's lead management expertise is built upon a best-in-class fuzzy matching algorithm, connecting leads to accounts within a company's database. LeanData fuzzy matching is designed to look beneath the surface and match based on multiple fields beyond just basic email domains.

A Better View Of The Account-Based World

The LeanData view allows your sales and marketing teams to immediately see results from our matching algorithm.

- Avoid multiple reps calling into same prospects, which results in a poor customer experience
- Inside sales teams spend more time engaging prospects and less time on account research
- Easily identify customer upsell opportunities



95 percent accuracy where a match exists.

A Big Company

Annual Revenue
\$350,000,000

Phone
(336) 555-3423

Type
Recreation

LD Account View

LeanData Duplicate Accounts | [See All \(Accounts:3\)](#) [Account Settings](#)

Account Name	Owner	Created Date	Number of Opportunities	Billing State/Province	Billing Country	Industry
Merge A Big Company, Inc	Vivek Ravisankar	10/12/2016	0	CA		Recreation
Merge A-B-C	Vivek Ravisankar	09/12/2014	0	CA		Recreation
Merge ABC	Vivek Ravisankar	11/12/2017	0	CA		Recreation

LeanData Matched Leads | [See All \(Leads: 3\)](#) | [Mass Convert](#) | [See Lead Activity](#) [Lead Settings](#)

Full Name	Title	Email	Company	Owner	Created Date	Status
Convert Joan Langston	CMO	joan@abc.com	A Big Company	Vivek Ravisankar	12/23/2017	Working - Contacted
Convert Susie Ford	CEO	susie@gmail.com	A Big Company	Vivek Ravisankar	12/23/2017	Working - Contacted
Convert David Bud	VP of Sales	david@abigcompanyinc.com	A Big Company	Vivek Ravisankar	12/23/2017	Working - Contacted

Tiebreakers

LeanData's fully customizable tiebreakers give you complete control over which account is the best match. This allows you to navigate complicated parent-child hierarchies as well as control for duplicate accounts.

The screenshot displays the LeanData configuration interface. On the left, a flowchart illustrates the matching process: a 'New Lead' (green pentagon) is processed through an 'Insert' step to a 'Match Node' (green pentagon). From the 'Match Node', a 'Match' step leads to an 'L2A Branch' (green diamond). The 'Branch' can lead to a 'Default' path or an 'Edge 1' path, which then leads to an 'L2 Territory' (green trapezoid). On the right, a configuration panel titled '2 Prioritize Matched Accounts' allows users to define tiebreaker rules. The rules are listed in a table with expand/collapse icons and a minus sign. Below the list is a '+ New Rule' button and three circular buttons labeled 'LOGIC', 'SOQL', and 'MIN MAX'.

Rule	Control
(Billing Country equals Country) AND (Billing State/Province equals State/Province) AND (Billing Zip/Postal Code equals Zip/Postal Code)	[-]
(Billing Country equals Country) AND (Billing State/Province equals State/Province)	[-]
(Billing Country equals Country)	[-]
Number of Children* MAX	[-]
Number of Opportunities* MAX	[-]
Number of Contacts* MAX	[-]
Last Activity MAX	[-]
Created Date MIN	[-]

Why LeanData?

Built upon the best-in-class matching technology, LeanData Engagement is the most simple, accurate, and actionable engagement analytics tool in the market.

LeanData provides the market's first Revenue Operations platform for accelerating revenue and growth in B2B. Standing at the center of Salesforce CRM, LeanData's family of solutions orchestrate and automate the go-to-market process to help revenue teams close more deals and drive more revenue, faster. Visit leandata.com to learn more about LeanData's revenue operations solutions for Lead-to-Account Matching, Routing, Engagement and Marketing Attribution. Or visit us on AppExchange.