

# Automate Routing Based on Sales Territories

Companies typically manage complex go-to-market motions by organizing into territories that are mapped to individual salespeople or teams. Sales territories can be defined based on parameters such as product lines, size of the company, industry segments, geography, sales potential or a combination of factors. LeanData brings you the easiest way to ensure your Salesforce Leads, Contacts, Accounts and Opportunities are automatically routed based on these territory definitions.

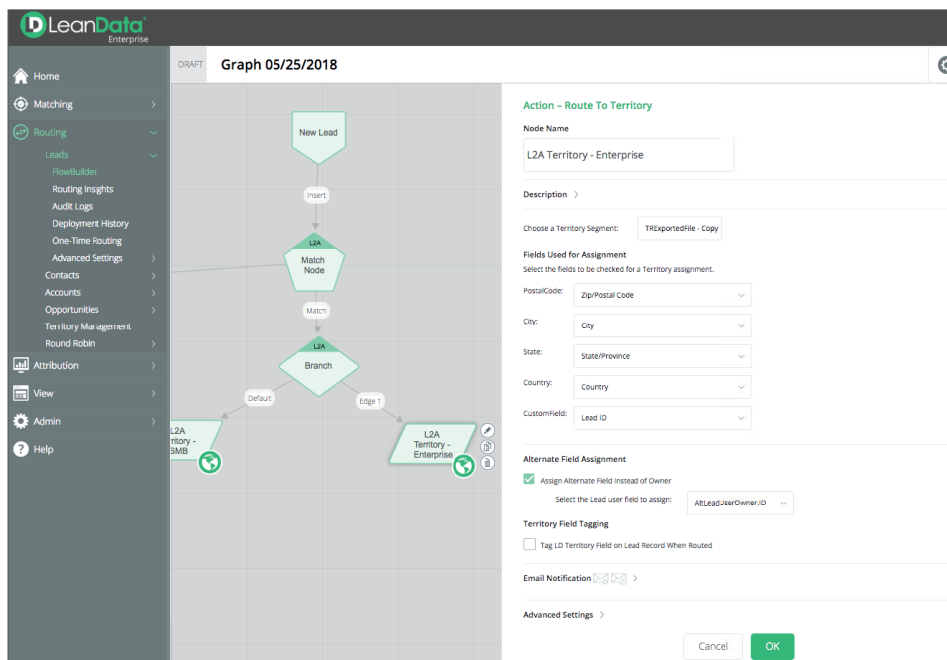
LeanData allows you to easily set up and maintain existing territory mappings and then leverage the visual FlowBuilder interface to assign Leads and other objects based on territories. With Routing Insights, you can also see how leads are being routed by territories and step up Marketing campaigns in regions that are not getting enough leads. With LeanData, Sales and Marketing teams align and manage custom business segments and sales territories to accelerate revenue.

## Critical Components of Territory Management

- Define business segments using CSV templates
- Map territories within each segment to individual owners or round robin pools
- Route Leads, Accounts, Contacts and Opportunities based on territories
- Track the number of Leads assigned by territories

## Safe & Secure in Salesforce

- Salesforce-native application
- Data is never exported
- History of previous routing rules maintained within LeanData



The screenshot displays the LeanData Enterprise interface. On the left is a navigation menu with options like Home, Matching, Routing, Leads, FlowBuilder, Routing Insights, Audit Logs, Deployment History, One-Time Routing, Advanced Settings, Contacts, Accounts, Opportunities, Territory Management, Round Robin, Attribution, View, Admin, and Help. The main area shows a 'DRAFT' graph titled 'Graph 05/25/2018'. The graph flow is: 'New Lead' (node) -> 'Insert' (action) -> 'L2A Match Node' (node) -> 'Match' (action) -> 'L2A Branch' (node). From the 'L2A Branch' node, two paths emerge: 'Default' leading to 'L2A Territory - SMB' and 'Edge 1' leading to 'L2A Territory - Enterprise'. On the right, the configuration panel for the 'Action - Route To Territory' is visible. It includes fields for 'Node Name' (L2A Territory - Enterprise), 'Description', 'Choose a Territory Segment' (TRExpandedFile - Copy), 'Fields Used for Assignment' (PostalCode, City, State, Country, CustomField), 'Alternate Field Assignment' (Assign Alternate Field instead of Owner, Select the Lead user field to assign: AllLead-UserOwner-ID), 'Territory Field Tagging' (Tag L2 Territory Field on Lead Record When Routed), and 'Email Notification'.

Proven Results with Over 700 Customers

## Benefits Of Territory Management

- Easily define and manage sales territories
- Ensure fair and transparent lead distribution based on automated rules
- Quickly track errors and improve territory definitions to make them more accurate
- Drive high-value leads where you intend your business to grow
- Easily reassign territory ownership to keep up with changing sales teams

Segments > Ownership

### Territory Management

US West Mid-Market [Edit Segment](#)

Owner Assignments    Territory Assignments

Owner Name	Territories	
> Bob Salazar	3	Select a new ow
> Susie Kurtis	1	Select a new ow
> Jane Wilkins	3	
> George Phillips	2	Acct RR Acct RR - copy
> Jamie Roberson	1	Bob Salazar Bowen Jiang

## Territory Management Helps Organizations in the Following Ways:

- **Distribute Leads Based on Geography, Industry, or Product Line:** Create and maintain territory segments based on these factors and assign leads to reps who are in charge of - or experts in - their territories.
- **Segment Demand by Prospect Type:** Assign leads and other objects based on the kind of company the Lead represents (e.g., SMB, Mid-Market, or Enterprise).
- **Optimize Lead Generation by Territory:** Use territory assignment reports to see where you need to focus your demand generation efforts and determine if strategic growth regions are getting enough leads.

### Key Integration Partners



Request Demo

### Get Started Today:

Visit [LeanData.com](https://www.leandata.com) to learn more about LeanData's go-to-market operations solutions for Matching, Routing and Engagement, or visit us on [AppExchange](#).

## Why LeanData?

LeanData is the industry leader in lead-to-account matching and routing solutions. Standing at the center of your Salesforce CRM, LeanData connects data to the right people at the right time, every time. By aligning Marketing and Sales with accurate matching, routing and trustworthy engagement analytics, sales reps receive only the leads, contacts, accounts and opportunities they need to work on, so they can close more deals and drive more revenue, faster.