

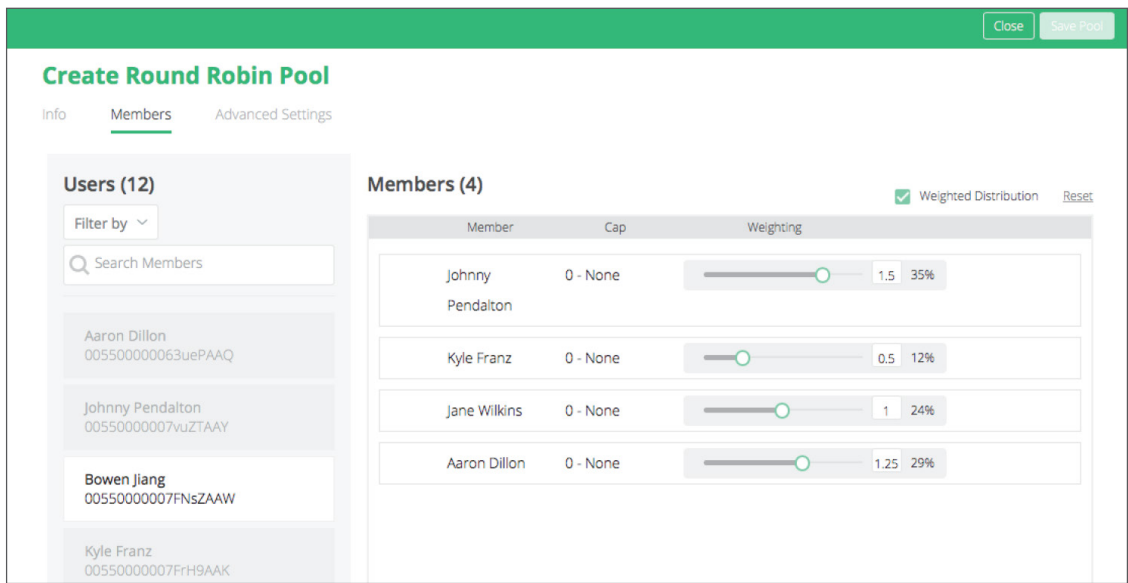
Round Robin Lead Assignments

Round Robin pools are one of the most commonly used and most crucial lead assignment methods for Sales organizations. They ensure there is a fast and fair distribution among front-line SDRs so everyone has a shot at meeting their quotas. However, Salesforce does not support out-of-the-box round robin assignment features. Instead, businesses spend inordinate amounts of time writing code and maintaining complex rules to implement round robin pools.

7x
more likely to qualify a lead when reaching out within an hour as compared to just one hour later.
(Harvard Business Review)

Increase Speed to Lead with Round Robin Pools

LeanData allows companies to set up multiple, robust round robin pools to support complex routing rules for leads, contacts, accounts and opportunities. Routing insights also help you see the actual round robin assignments by rep so you can better control your pools.



Handle Multiple Use Cases for Round Robin Distribution

- Skip over representatives who are travelling or when it is outside their working hours
- Assign a smaller share of leads to new team members who are still ramping up
- Stop assigning leads to representatives who are already working at capacity

Proven Results with Over 700 Customers

Create Round Robin Assignment Rules to Meet Your Unique Needs

Users (12)

Role

Search

- CEO
- CFO
- Channel Sales Team**
- COO

Aaron Dillon
00550000

Create Multiple Pools

Set up new round robin groups by searching by name, role or profile, dragging and dropping members

Customize Round Robin Pools

Customize each pool by setting up custom weighting, capping and access levels

Members (11) Weighted Distribution

| Member | Cap | Weighting |
|--------------|----------|--|
| Aaron Dillon | 0 - None | <input type="range" value="1.5"/> 1.5 12% |
| Bowen Jiang | 0 - None | <input type="range" value="0.75"/> 0.75 6% |
| Kyle Franz | 0 - None | <input type="range" value="0.75"/> 0.75 6% |

Working Hours optional

Create Working Hours

Name Save as Template

Timezone

Sunday

Monday

Tuesday

Wednesday

Manage Routing

Mark a team as out of office during certain days and times, or schedule upcoming vacation dates for specific team members

Key Integration Partners



Request Demo

Get Started Today:

Visit 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.