

## Automatically Route Opportunities To The Right Rep

Leads are the most important CRM object at the top of the funnel. However, as the sales cycle progresses, objects like Opportunities, Contacts, and Accounts take center stage. That is why LeanData provides the most robust routing solution to ensure that all Salesforce objects can be easily and automatically routed to sales team members based on your custom business rules.

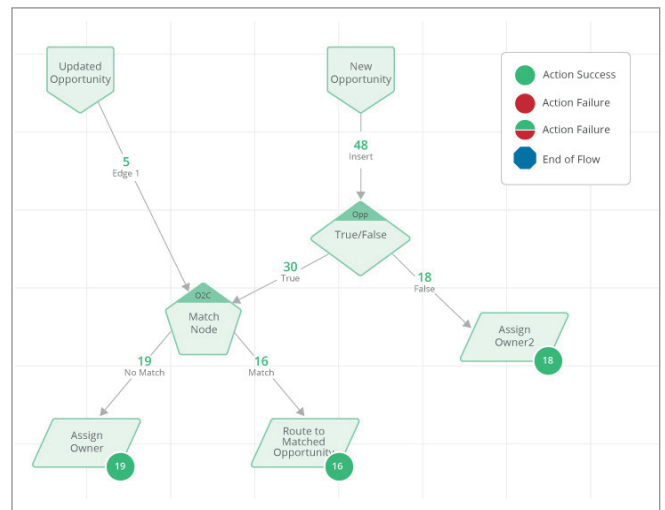
Opportunity Routing is one such critical aspect as it determines how opportunities are managed throughout the customer lifecycle. Using LeanData Opportunity Routing, you can easily create assignment rules on new opportunity creation, opportunity stage updates, and even after winning or losing an opportunity.

### Opportunity Routing can help organizations in the following ways:

- Auto-create & Assign New Opportunities:**  
 Define the business rules for routing new opportunities that are created automatically when certain conditions are met (e.g., the lead / contact has seen a product demo)
- Renewal Management:**  
 Create a renewal opportunity and automatically assign to a sales team member (e.g., the Customer Success Manager)
- Up-sell / Cross-sell Management:**  
 Route growth opportunities to the relevant sales rep to grow an existing account
- Lost Opportunity Re-engagement:**  
 Route lost opportunities to new owners for post-loss nurturing in order to reactivate interest

#### Safe & secure in Salesforce

- Native within Salesforce environment
- Your data is never exported
- LeanData maintains history of your previous routing rules

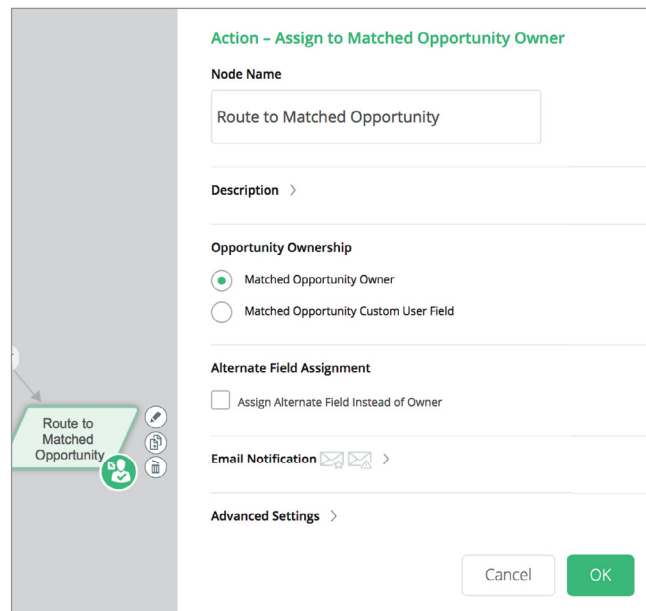


## Benefits Of Opportunity Routing

- Ensure pipeline distribution is fair, fast, and happens without manual bias
- Faster sales cycle by responding immediately to new deals
- Grow accounts faster with better post-sale opportunity management
- Leverage lost opportunities in the system to win new deals

## Critical Components Of Opportunity Routing

- Define business rules that trigger opportunity routing
- Assign opportunities to matching opportunity or contact owners
- Automatically update opportunity fields or assign opportunities round robin to owners
- Notify owners of new opportunities assigned to them
- Use Routing Insights to optimize opportunity assignment rules



## 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](http://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.