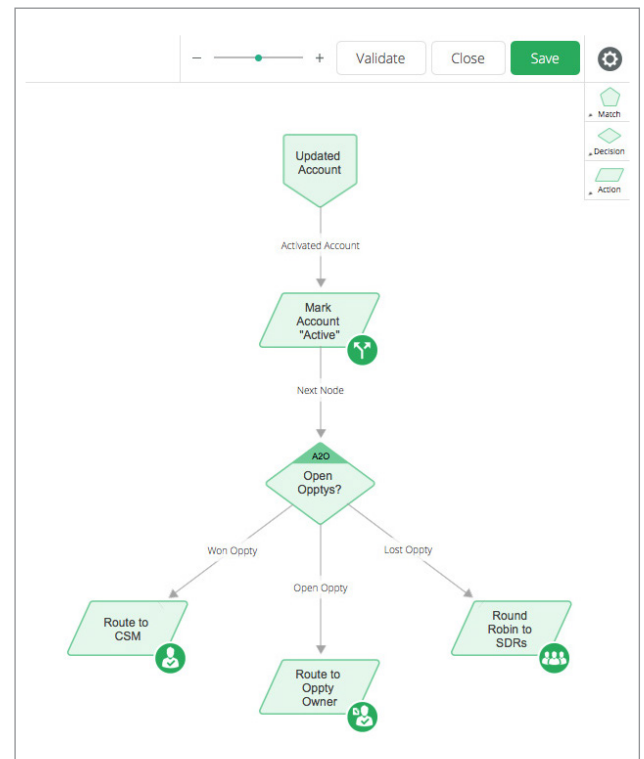


Automated Account Distribution

Companies need automated distribution rules not only for leads and contacts, but also for accounts. This is particularly useful if you leverage account-based marketing and sales processes. You are able to assign account owners when accounts meet your specified criteria to be become “Marketing Qualified Accounts” (MQA) or “Sales Qualified Accounts” (SQA). LeanData’s Account Routing brings the power of its visual FlowBuilder and automated Routing to the world of Salesforce Accounts. It enables you to implement company business / territory rules in a fair and uniform manner while allocating accounts to sales reps.

Critical Components Of Account Routing

- Visual FlowBuilder to easily build any Account Routing flow to automate your business processes
- Define business rules that trigger account routing
- Set up rules to determine ownership
- Assign owners to round-robin groups
- Assign account owner using several methods, including account teams, user lookup fields, or owner mappings
- Leverage Routing Insights and Deployment History to monitor account assignments and instantly optimize your flow at any time
- Send notifications to alert owners when they’ve been assigned accounts or notify users to proactively address routing errors



Applications Of Account Routing

- Assign accounts to reps when they become MQA or SQA
- Assign accounts based on company’s territory rules
- Re-assign accounts from former reps to new reps based on your routing rules

**The Gold Standard
For Lead, Contact &
Account Routing**

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.