



Lead Management Program Transformation of the Year: Emerging Enterprise

An operations-led initiative that drove transformational change in the people, process and technology of the lead management engine to improve speed, accuracy and agili-ty lead distribution and response.

The Winner



The Challenge

Everbridge, a critical event management platform used by 6,300+ global organizations, was experiencing multiple inefficiencies in their lead management process. With routing systems housed in two different platforms and owned by two different teams, a variety of problems arose with leads. Despite 100+ Salesforce rules and 30+ Marketo programs, neither platform could support Everbridge's complex logic rules. Plus, the two routing platforms made implementing an ABM strategy difficult as sales team members had limited visibility into accounts.

Additional lead management issues ranged from record duplication to lost leads to uneven lead distribution. Sales team members were spending valuable time manually matching leads or creating new accounts resulting in an even more inaccurate database. Leads were not being nurtured and moved through the flow because of inactive owners and erroneous object reassignments. Even the process of recycling inactive records was being done manually. Ineffective lead management ultimately impacted forecasting, which in turn made future planning and decision-making difficult.

The Operational Approach

Everbridge recognized the importance of one platform that could support the company's complex needs. Implementing LeanData Matching and Routing, Everbridge can now build and manage logic in an all-in-one FlowBuilder, making it easier to troubleshoot and manage. All updates are made in real time. The former manual process of recycling inactive

records has been replaced by an automated scheduled job in LeanData.

To solve uneven lead distribution, Everbridge has incorporated a round robin routing solution. In addition, by implementing an SLA notification flow, leads now undergo timely follow-up or route to an escalation policy that reroutes unworked leads and contacts.

These new lead management processes have automated manual processes and simplified routing logics for territories.

Operational Results

Everbridge experienced positive outcomes for both internal teams and customers. For BDRs and sales team members, leads are now distributed evenly, according to territory management rules, while accounting for time zones and holidays. Leads are sent to the right owners at the right time. Team members have greater visibility into the account database and the data itself is cleaner.

Other measurable results include:

- 5 hours per week saved by BDRs due to the elimination of manual lead management and routing, resulting in quicker response times and faster conversion rates
- 50% reduction in time savings for the Marketing Ops team in maintaining lead routing
- 30% reduction in lead management troubleshooting due to detailed audit logs
- Time and money saved by not developing a custom, in-house routing solution
- SLA is now tracked on every cadence to ensure prompt follow-up

With an enhanced lead management process in place, customers benefit from an improved buying experience as high value prospects are moved through the pipeline faster.

“With many new updates and improvements to LeanData, we’re looking into other areas like 6sense integration or the deduplication features to take further advantage of this powerful tool.”

– Hang Nguyen, Marketing Operations Specialist