



## Lead Management Program Transformation of the Year: Large 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 agility lead distribution and response.

### The Winner

## DELL Technologies

### The Challenge

With existing software and processes causing slow lead routing times, duplicate leads, and long waits for routing changes, Dell Technologies wanted to upgrade their lead management system. However several issues created barriers to automation.

Dell's 10+ year Salesforce instance was weighed down with technical debt and over-customization. This caused slow page load times, performance issues, and problems with software upgrades. In addition, their Salesforce instance contained complex custom code which housed lead routing logic that only a few people understood. When a change in logic was needed, Marketing Ops team members had to work with IT to request the change. And with routing logic going through IT, individual changes would be implemented without being fielded by related departments to ensure it complied with global processes and best practices. Manual and redundant routing measures became the norm due to regional logic exceptions and, as a result, leads were taking much longer to get to the Sales Team.

Further complicating these issues, Dell was using products and tools outside of Salesforce for automation, making it difficult to troubleshoot between the platforms and produce solutions quickly.

### The Operational Approach

Dell decided on the implementation of LeanData to allow the business, Marketing Ops, to make modifications to the Lead routing logic whenever changes were needed, rather than IT. Next, marketing automation was moved into Salesforce with

LeanData routing logic handling all processes surrounding lead management. The business transformation began with extensive tool evaluations, training, user acceptance testing and other requirements gathered from across the Marketing organization to ensure the accuracy of the newly established lead routing logic.

Using LeanData, Marketing Ops now had greater control over routing decisions, eliminating inconsistencies across regions, and allowing for a global process to be established for all leads. With LeanData's audit log, Marketing Ops could quickly pinpoint and correct any routing issues. LeanData also facilitated an automated mapping of leads to accounts working seamlessly with Dell's internal customer engagement platform. The scope of LeanData allows Dell to rethink how Leads are handled, even beyond Lead routing.

### Operational Results

Dell describes the benefits of using LeanData as "astronomical". They can now provide data-rich leads to sales in an amount of time previously thought to be impossible. LeanData allows reps to have high priority leads in a matter of minutes, while concurrently matching Leads to existing accounts, making sure the leads are not spam, and updating the localized monetary currency based on the Lead's geographic location. The transformation has increased sales revenue, decreased lead routing time, and allowed for better collaboration between Sales and Marketing. It has also provided opportunities for flexible lead solutions and freed up bandwidth and resources within the IT organization.

Dell's Salesforce instance can also breathe easier now as 10+ years of technical debt and custom code have been removed. LeanData has enabled Dell to have precise routing logic, despite being a massive company with thousands of leads coming in daily from multiple sources. With over 25,000 sales reps spanning across the globe, LeanData gets the leads into the hands of these reps almost instantaneously.

**"This lead automation project has completely transformed Dell's lead management processes by moving from slow, manual work to streamlined, automated functionality. By optimizing lead routing logic, Dell has been able to implement global rules across all regions, driving standardization in best practices, privacy, and customer experience."**

**– Zach Olson, Senior Analyst, Lead Automation**