

# OperationsOS Route.

Transform your revenue operations into a well-oiled machine.

Efficient lead routing is often difficult due to organizations facing changing personnel, account structures, and market conditions. To combat such fluctuations, revenue, sales, and marketing teams require a process that reliably and accurately routes records to an appropriate owner in a timely fashion.

The key to efficient revenue, marketing, and sales operations is sending leads to the right place at the right time. If a mid-funnel customer reaches out and connects with a salesperson who specializes in net new customers, they're not going to get the proper assistance needed to drive them to the end of the funnel.

With a flexible lead routing process in place that takes into account each type of data and changing conditions, you can rest assured that the demand your organization generates can be acted upon most effectively.

## Benefits of Route

With Route, you can effortlessly create business rules that automatically route any type of data into your system based on any field or related object field. Intelligent lead routing will reduce your lead response time, streamline your account-based marketing strategy, and significantly improve conversion rates. To achieve the full potential of Route, activation of OperationsOS Cleanse is necessary.

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**With Route, we cut our Lead Routing time from 3 days to less than a minute - which had a huge impact on our sales effectiveness.”**

**Matt Kromer**  
CRM Marketing Manager  
at Spectrum



## **Effective enterprise territory management & assignment flows**

While Salesforce can only apply territory models at the account-level, OperationsOS Route auto-populates the territory models pre-built in Salesforce within a Route workflow. Not solely limited to the account-level, Route automates the process of mapping account-level fields to their target object fields (e.g. leads, contacts, opportunities). Each territory's assigned users are also auto-populated within a Round Robin. Enterprise territory management can ultimately save time and eliminate manual processes.

OperationsOS data management processes solve common data problems that can obstruct and cause dysfunction in a typical, siloed routing process. You can continue to design and make updates to routing criteria using a nested workflow builder or with simple rules, without the need for complicated decision trees. Develop criteria that auto-creates opportunities, update specific opportunity fields, and notify owners of new opportunities assigned to them. With the ability to leverage any Salesforce trigger, whether it leads, contacts, or accounts, your sales team will be equipped for faster follow-up on any incoming records.

## **Optimize lead distribution with round robins**

Customize your round-robin lead routing via weight and cap to ensure optimized distribution amongst your sales team. Weighting allows for team members with varying levels of experience to tackle leads that are appropriate for them. Take it a step further and route priority leads based on any criteria (such as lead score, ICP attributes, revenue size, etc.) to more experienced reps and assign new team members low hanging fruit, so you can drive higher conversion rates.

To ensure reps are not overburdened with too many incoming leads at once, leverage capping. Easily monitor and improve your lead distribution process with activity reports and one easy-to-view dashboard. You can notify and assign Salesforce tasks to reps when an action is required, for example, notify a sales rep's manager if there is no activity on an assigned lead within 24 hours to ensure follow-up.

## **Automate account-based selling motions with dynamic account teams**

Support selling to large accounts and automate complete account hierarchies at scale by routing not just to individual sales reps, but to an entire team of players collectively pursuing a large account. Each member of an Account Team is immediately notified when they are routed a new account in order to quickly follow-up and strategize a win as a team.

## **Maintain a healthy database**

Perform recurrent updates to maintain the health and integrity of your database. For example, a batch process can be useful for conducting batch territory reassignments on records owned by inactive users.

## **Match leads and contact to opportunities**

Match a new lead or contact that enters your system with an existing account, and use Route to set up a rule to automatically assign that new record to the owner of an opportunity associated with the account, so the assigned sales rep can take action.

