

Tips for Configuring Lead Routing



INTRODUCTION

Organizations have to respond quickly to leads in an age of complex market dynamics and digital consumer behaviors. As businesses grow, lead management can become increasingly challenging, and it's essential to enable processes for effectively routing customers so that companies can meet consumer demands and expectations for personalized experiences.

The larger organizations become, the more necessary it is to implement automated solutions to enhance operations, streamline processes, and organize sales leads. This ensures that leads can be efficiently distributed to sales teams and no customer lead goes unnoticed or without help.

Organizations across industries need automated technological capabilities that help them to scale operations so that they can implement strategies that help them to serve all of their prospective customers across the value chain.

Lead Routing Challenges

Lead routing is also called lead assignment. When customers are looking for products and services from a company, employees assign those customers to sales teams and representatives to convert leads to sales. This process is called lead routing.

However, manual lead routing processes are out of date. Manually trying to organize customers and assign them to sales teams is time-consuming and complex, especially for larger organizations. Employees have to focus on core tasks, and sales teams need to serve customers instead of figuring out how to route leads. If organizations use manual lead routing, it can result in:

- Missing out on sales opportunities.
- Customers moving onto competitor companies.
- Mismatching account leads to the wrong sales representatives.
- Taking way too long to route customers.
- Frustration for employees and customers.
- Follow-up delays.
- Sales teams are misinformed during customer interactions.
- Wasting resources on maintenance time.
- Limiting sales operations.
- Unfulfilled routing requirements.

Businesses are exposed to many different types of customers in the digital era. Organizations need modern, automated lead routing tools to match the best sales representatives with the most prospective customer at the right time.

Lead Routing Best Practices

Lead routing needs to be efficient and mature. Not only is having the right tools and technologies in place integral for lead routing, but it's important to implement the right plans that are going to help your organization succeed.

Start by aligning your sales and marketing teams by analyzing customer personas. Use data to create and segment customer profiles. Next, create buyer scenarios based on lead scores. Lead scores are essential because leads get assigned to the best sales representative based on a numeric score. Lead scores take into account many different factors, such as geography or use case. Sales and marketing teams can use this information to establish and map critical points of interest for specific steps and touchpoints along the customer journey.

Creating a unified scoring model helps to unite teams and ensures that everyone is on the same page. You can use scoring for taking actions, different customer personas, and varying customer behaviors.

When leads get distributed, the new lead routing process should be documented. New criteria can be added and analyzed, such as industry, products, timeframes, or how long each step takes on the lead routing process. Having the correct data helps sales and marketing teams to personalize their contact with customers, improving outreach and engagement.

In combination with the right data and tools, having a great strategy is how the most successful organizations are configuring their lead routing processes. This includes real-time tracking to effectively and accurately measure how your lead routing is working.

Advanced Automated Lead Routing

Automated routing systems can be integrated with customer and business data, synchronizing systems while improving functionality. Having systems, marketing data, analytics, and lead tracking capabilities on a single unified platform help organizations prioritize customers using interfaces, dashboards, and reports that streamline actions and empower sales teams.

When sales and marketing teams have these tools and capabilities, they can precisely configure lead specifications and use comparative tools to discover trends. Also, they can start to remove lead routing tactics that aren't working or no longer serve a purpose.

Organizations can optimize the lead routing funnel, targeting specific criteria to qualify inbound leads from multiple sources, whether that's through web, email, or calls. Sales and management teams must focus on the customer, and automated tools and streamlined systems are easy to use, with drag and drop features and visual layouts that simplify lead routing. Employees can set reminders and receive notifications and easily route customers to other available representatives as needed.

Lead routing configuration needs to be completely customizable and flexible, taking into account omnichannel customer interactions. As customers change between online or offline channels, such as searching on the web to making a mobile call, these channels need to be integrated to better convert leads into sales. [Customers are having difficulty](#) continuing their journeys when they are switching between online and offline channels. Maximizing lead routing configuration considers all customer touchpoints. When customers are routed, they can make the best decisions for them, and your business can increase conversion rates.

Sales teams need automated lead management tools so that they are agile in their collaboration. Sales management can use cross-functional teams to better understand customer behavior and channel performance and better understand how products and services fit customers' needs. Of course, as businesses grow, so do sales teams. But there shouldn't be more complexities introduced when having larger teams and more customers to work with. Mature, automated lead routing will reduce the challenges employees are dealing with and eliminate the frustrations that customers are experiencing when trying to purchase solutions for your business.

Use the Right Systems to Configure Lead Routing

Don't let your leads slip through the cracks. Use automated lead routing and lead management tools that are easy to set up, maintain, and are completely secure.

Create opportunities for your organization that help to match customers with the most qualified employees. At the same time, equip your sales teams with the tools that can support their skills and help your business meet the needs and expectations of modern digital consumers.

[Contact LeadAngel](#) to learn the best techniques to configure automated lead routing solutions