

The Benefits of Auto Merge and Convert Lead Management Tools



INTRODUCTION

Organizations need the tools to deliver exceptional customer experiences. With so much customer data at business's fingertips, they have the opportunity to enhance analytics and tailor lead management strategies to enhance growth at scale.

Auto merge and convert lead management tools empower organizations to overcome their most pressing routing challenges, improve trust with customers, and standardize all of their customer data so that it's readily accessible for their various management and sales teams.

Businesses can use automation to get a 360° view of customers and simultaneously eliminate confusing and complicated charts and visualizations.

ABM Common Lead Management Challenges

Businesses need to prioritize the customer, but they often struggle with too many manual reconciling and routing processes that waste time.

[According to McKinsey](#), future-ready organizations are able to connect with customers more closely, predict behaviors, and identify customer experience challenges and opportunities in real-time.

Sales and management teams need information about their customers quickly, as customers expect seamless and fast interactions with businesses when they are looking for products, services, and solutions. But many companies experience disconnections and conflicts between sales teams that hinder their ability to efficiently serve customers and maximize potential for successful engagements.

If a customer can't find what they are looking for, or if it takes too much time to talk to sales representatives, or if sales teams sound misinformed during their interactions, then the customer is likely to move on to competitor companies who they feel are more organized, reliable, and able to meet their needs.

Organizations need to be pre-emptive and able to satisfy customers along every step of their customer journey, and accurately and successfully outreach when customers need help.

Businesses need a structure that improves traditional systems and capabilities to leverage customer insights and management tools that signal immediate actions, create compelling, simplified, and accurate customer profiles, and take advantage of various aggregate data sets.

Ultimately, sustaining customer satisfaction and retaining customer loyalty can be achieved when business leaders can take advantage of systems and applications that help them to engage with customers in real-time.

Organizations are further challenged by the increase in digital channels as they have to adopt complex omnichannel strategies to improve performance. But without the right platform and tools that help them manage their customer data, businesses may experience:

- Repeat interactions with customers.
- Longer lead times.
- An inability to see when customers switch channels.
- Lack of understanding as to which personnel within their organization have been communicating with customers, and for what reasons.

Top Benefits of Auto Merge and Convert

Auto merge and convert tools help organizations reinvent and tailor their lead management strategies to better support customers on their customer journey. Here are some of the top benefits organizations can experience from auto merge and convert tools:

- Reporting and Analytics

Analytics and reporting are the foundation that helps organizations gain the insights that they can use to reinforce strategic development. [In fact, improving analytics support](#) can help leaders obtain a 2% to 5% increase in sales and help sales teams coordinate and gain a 5% to 10% sales increase. Businesses gain more accurate reporting and analytics support and a more comprehensive view of the customer with auto merge and convert tools.

This helps businesses to not only personalize the customer experience, but also helps them build unique customer profiles so that they can take a predictive approach to analytics and serving customers.

Auto merge and convert tools provide other benefits that help businesses:

- Enable clean, quality and consistent data.
- Enhance marketing strategies.
- Improve revenue management.
- Identify early development trends.
- See a timeline of customer touch points.
- Augment customer research.
- Scale customer support strategies.
- Enhance sales planning.
- Improve sentiment analysis.

- Sales Efficiency

Auto merge and convert tools help management and sales representatives not only get a complete and holistic view of the customer journey, but helps them understand who on their team has communicated with customers and for what reasons. Being able to effectively coordinate sales teams helps organizations allocate resources and better manage time. It also enables businesses to:

- Pinpoint customer pain points.
- Identify what specific issues customers need help with.
- Determine what products and services customers are specifically looking for.
- Reduce employee frustrations as they can quickly find the right customer information.
- Help customers find the best solutions.
- Create a seamless experience for customers across channels.
- Gives employees an easy to use, clear and intuitive digital interface to work with.

- Reduce Costs

Auto merge and convert tools can help organizations save a lot of money. They can reduce their dependency on other Customer Relationship Management (CRM) platforms or strike a balance between which functions and features they need to use when operating CRM systems.

“Also, auto merge and convert tools improve employee efficiency so that the right resources are allocated to support specific customer cases. Employees won’t waste time chasing duplicate leads, or ignore market leads that they feel they are not qualified to handle. There will also be a drastic reduction in customer outreach time. Employees can quickly get to one customer, and move onto the next one without any delays.

Businesses will spend a lot less time on manual lead management tasks because sales activity will be automatically logged. This enables businesses to spend more time focusing on their sales pipeline and workflows, and better coordinate their teams and lead assignments.

Best in Class Professional Auto Merge and Convert Software

Businesses need a complete and unified view of customer touchpoints at every stage of their customer journey. With auto merge and convert tools and software, businesses can focus on delivering the exceptional experiences that customers expect in an age of digital, omnichannel interactions.

Support, enhance, and tailor your analytics strategies, give your employees the tools to do their jobs with maximum effectiveness, and take a pre-emptive approach to lead management.

Contact [LeadAngel](#) for more information about how to implement auto merge and convert tools into your organization.