



DATA MANAGEMENT

INTRODUCTION

Availability of the right information makes a huge impact on the sales and marketing outcome. When the right information is presented in a consumable format, it better engages the audience and customers and provides preferred results.

Some of this critical information can be used for marketing activities such as targeting/segmentation, routing, nurturing and reporting, while some of the data management can help reduce duplicate leads & accounts to increase sales efficiency.

RECORD LINKING AND DATA APPEND

LeadAngel's proprietary algorithms and rules link disparate entities such as leads, accounts, contacts & opportunities to provide a 360 view of data. Users can even upload a non-CRM account list to be mapped against existing contacts, leads, CRM-accounts, and opportunities.

Once a lead has been matched to an Account or Contact, it is possible to copy account attributes to lead record, or to auto convert leads into contacts and accounts.

LEAD TO ACCOUNT MATCHING AND LINKING

LeadAngel matches every incoming leads against customer's CRM accounts. Once matched, the lead record is updated with matched account, and is tied to the account. Salesforce Account view can now show all the leads (in addition to contact) as a related list. Further, all the matched leads can now show additional information such as other related leads, contacts and opportunities on the lead record. This information could be critical for Inside Sales to qualify new lead record.

LEAD TO ACCOUNT CONVERSION

Some organizations have extra emphasis on Account Based Selling. It may be desirable for them to convert any green field lead into an account, and then assign the account to an appropriate territory representative. LeadAngel router makes it super easy to convert leads from green field account to a CRM account. Additionally, a new contact and related opportunity record can be created as well.

LEAD TO CONTACT MATCHING

Incoming leads are matched against CRM contacts. LeadAngel lead to contact matching algorithm looks beyond simple email based match. It also looks into company name (fuzzy matched) and company domain.

LEAD TO CONTACT CONVERSION

Incoming leads are matched against CRM contacts. When a lead to contact match is found, lead can be merged with matching contact in real time to avoid duplication. If no contact match is found, then lead can be converted into a new contact record.

Additionally, based on business process the new contact owner can be selected and opportunity can be created for sales to follow-up.

DE-DUPLICATION

No database is free from duplicate, more so for Marketing data sets. It is not uncommon to see duplicate leads or accounts. LeadAngel record matching algorithm identifies and groups potentially duplicate leads and accounts for the operations to team to resolve, or to run automatic de-duplication rules.

LEAD DE-DUPLICATION

LeadAngel's lead de-duplication algorithm takes into account the name, company domain, company domain aliases and matched account.

Once a duplicate lead has been identified, Using LeadAngel platform it can be merged with other lead

with option to keep either the older or newer record as the survivor record.

ACCOUNT DE-DUPLICATION

LeadAngel has capability to identify and flag duplicate accounts at multiple level. By default, duplicate accounts are flagged at Ultimate Parent level; however customer can request to add another level using other filters such as geographic location (City, State, or Country). Multi level flagging is useful for organizations targeting local branches such as facilities provider or event management companies.

DATA MANAGEMENT REPORTS

ACCOUNT COVERAGE REPORT

Ever wondered how your existing person database (leads and contact) spread across your CRM accounts.

LeadAngel has built-in report that shows contact spread over the existing leads, so that you can focus spending your suspect/prospect acquisition dollars strategically.

ABM SEGMENTATION

Generate custom reports to pull leads and contact from a desired account list based on Account Name. Account names are fuzzy matched. Example, if you pull a report for IBM, it pulls IBM, International Business Machine and many more variations of IBM along with company it acquired in past.

ABM segmentation is helpful for Account Based Sales and Marketing.

INTEGRATION

LeadAngel platform is designed to integrate with other platform using API (REST or SOAP). Custom integration can also be developed by professional services group upon request. LeadAngel is natively integrated with Salesforce, Marketo and Hubspot.

