

## RULES CUSTOMIZATION

### INTRODUCTION

Businesses need to look for leads, existing customers, and even other businesses to survive, for this purpose they utilize Account Based Marketing.

A key component of ABM is to match accounts against leads. When engines or platforms match a lead to an account, they don't do it at random. They look for certain parameters, data points, and other factors. How these parameters, data points, and factors are defined or handled can affect how accurate a match is.

Lead to Account matching requirements vary based on the objective. For lead routing, a tighter and confident match is required; this means more parameters and data points are matched. There will be fewer results, but these results will match what you are seeking more closely. For marketing segmentation, one can relax the parameters and data points a little and cast a wider search net. Lesser parameters are matched but there will be more results to choose from.

### KNOW WHERE TO LOOK, AND HOW TO LOOK

Looking for an existing account? What you are looking for may not be there anymore, or at least not in the same name, form, or under the same ownership. The business world is dynamic, anything can happen in a second; businesses fold up, some companies are swallowed up or bought out by others, corporations can merge without much fanfare. You need a platform that

has its ear to the ground regarding this kind of developments.

Then again, it's not just about which company bought what company. Some businesses may have strange soundings names, or different names few people are familiar with. Also, at times companies may be spelled differently across geographical regions; a good platform should be able to see through that all this.

The sales operations branch of businesses are often in-charge of lead routing program, they have to keep up with industry and marketplace changes. LeadAngel offers a comprehensive lead to account matching, and lead routing tool. Here are some of the things you can do with our match algorithm:

#### CUSTOM MATCH RULES

When it comes to matching, LeadAngel's Fuzzy Match engine lets customers to define their own match rules to either **Always Match** or **Never Match**.

Always Match rules are first validated, and using LeadAngel's fuzzy algorithm these are applied to parameters and data points like acronyms, popular names, merger/acquisitions, email and web domain, company suffixes and special characters are considered. Even the location of results is taken into account.

Are those match rules rigid? Not at all. Any of those data points can be enabled or disabled depending on how accurate you want the search to be.

When choosing the Never Match, the rules can be applied to block any unwanted match. So even if the

search comes up with something close, your restrictions still apply.

### MANUAL RESOLUTION

During the matching process our algorithm may come across items that fall into that gray area between the items you are looking for and the items you aren't. We don't leave things to chance; sometimes important decisions have to be made using human judgment. This is why our system automatically flags closer, uncertain matches for manual resolution.

Customers can periodically review these unconfirmed matches to decide whether they stay or they go. After decisions are made, these matches can be exported to create custom rules for future matching to provide more consistency and accuracy.

### INTEGRATED WITH 3<sup>RD</sup> PARTIES

LeadAngel's lead to account matching engine works well with other platforms. Do you need help from Market Automation Platforms like Eloqua and Marketo? Our

algorithm can readily integrate with their framework. LeadAngel lead router has native integration with Salesforce.

### ALGORITHM FOR SUCCESS

Sometimes, coming up with the right results can mean the life or death of a business...**your business**. Make sure you have tools that can find what you are looking for and when you need it, and make sure these are tools you can tailor to your company's specific needs.

Allow us to give you the edge. We have a proven algorithm that we have developed over the years, what is even better is that it's not a stagnant system, we can further refine it in response to our clients' needs and the changes in the business world. Take advantage of it to further your business.



[www.leadangel.com](http://www.leadangel.com)

830 Stewart Dr. STE 228 | Sunnyvale, CA 94085 United States

Telephone: +1 408-372-6077 | [info@leadangel.com](mailto:info@leadangel.com)