

WHITE PAPER

UNLIMITED POSSIBILITIES

MATCHING LEADS AND ACCOUNTS CREATES NEW
POSSIBILITIES AND SALES OPPORTUNITIES



TABLE OF CONTENTS

| | |
|-------------------------|---|
| INTRODUCTION | 3 |
| LEAD ROUTING | 3 |
| ACCOUNT STATUS | 3 |
| PARTNERANDCOMPETITORS | 3 |
| ACCOUNT ACTIVITY VIEW | 3 |
| OPPORTUNITY ATTRIBUTION | 3 |
| SEGMENTATION | 3 |

INTRODUCTION

A data explosion has accompanied the widespread use of the internet. With the accelerating pace of technological development, we see information generated on a scale never been seen before. According to recent studies, 90 percent of the world's data generated in the last two years alone. This trend will likely continue in the foreseeable future with the continuing growth of the data market. This offers unlimited possibilities to businesses wishing to use information to grow and provide better services to customers.

Sales and marketing organizations still need to systematically identify and understand customers and provide them the appropriate intervention. This not only serves customers but also improves organizational efficiency and confidence. Today, all other existing Customer Relation Management (CRM) tools leave a wide gap open by not tying a lead to an existing account. Ultimately, this leads to a chaotic situation marked by multiple organizational inefficiencies. Correctly linking a lead to an account not only helps save resources by improving processes and response time but also grow revenue.

LEAD ROUTING

The main benefit of lead routing is linking leads to an account. This seems obvious but many, however, miss this out. Sales organizations prefer to reach out to named accounts or existing customers rather than routing these leads to some random sales team. This helps actually builds trust with the customer and paints a complete picture of a customer's activities for the sales person. This way, sales can engage with customers in a more meaningful way.

ACCOUNT STATUS

When leads are tied to an account, information on the leads, sales contacts, account and opportunities now all appear on the same screen. This is critical information that helps sales guide the conversation and bring it home.

PARTNER AND COMPETITORS

In the event that a lead happens to be a partner or competitor, the program simply avoids matching it to an account. The lead will not get routed or is suppressed in the case of a partner.

ACCOUNT ACTIVITY VIEW

Matching leads against respective accounts also opens the door to roll-up individual activities at the account level, providing better lead scoring opportunities.

OPPORTUNITY ATTRIBUTION

After leads are matched to accounts, the resulting opportunities can be traced back to the lead the activities or campaigns connected to it. This will help create a detailed, customized attribution report to highlight the best practices and performing campaigns.

SEGMENTATION

It's not only sales but also marketing contacts that could be matched against an account. Once this is done, account based segmentation is only a click away, resulting in better yield for account based marketing.



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

Telephone: +1 408-372-6077 | info@leadangel.com