Your 7-Step Guide to Swift and Accurate Lead Routing

STEP 1:

Talk to Your Sales and Marketing Teams

Before you begin developing a lead-routing process, get input from both your Marketing and Sales teams. You can ask them the following questions to get a clearer picture of their expectations and what they deal with daily:

- What do you consider a qualified lead (industry, job title, job roles, expertise, etc.)?
- What signals tell you a lead is sales-ready?
- What are the pain points prospects tend to have the most during the sales process?
- Is there more than one person included in the buying process? If so, how many?
- Approximately how long does the sales process take?

STEP 2:

Unify Lead Scoring and Grading

Now, it's time to create a model for scoring leads that both departments will use. This includes assigning point values based on the personas, actions, and behaviors of prospects. This will determine the interest level of the prospects for a particular product/service.

There are many lead scoring tools out there to choose from. But beware: scoring point-solutions are notoriously unreliable due to a lack of sufficient, high-quality underlying 3rd-party data. Customer Data Platforms (CDPs) are increasingly a preferred option for lead and account scoring among sophisticated Marketing and Sales teams, as they provide both the data and AI scoring technology necessary to build accurate customer scoring models.

STEP 3:
Document Lead Distribution

You'll need to document the following to create your lead routes:

- Criteria for lead routing (geo-location, product interest, industry, etc.)
- Follow-up time frames (within 2 hours, 1 day, 2 days, etc.)
- Support from management to ensure sales is accountable
- Step-by-step process leads go through from form completion to sale
- Approximately how long does the sales process take?

STEP 4:
Qualify Leads that Are Ready for a Sales Rep

There are different ways you can qualify a lead before it's routed to a sales rep. For example, a lead belonging to an account that's visited a product page multiple times in one week, or shown significant interest in related topics on other websites, is likely sales-ready, as opposed to a new visitor who downloads a white paper.

Of course, you need the right tools to monitor B2B buying intent - be it 3rd-party intent data or a reverse I.P. to see who's visiting your own website.
Click here for more on intent data.

STEP 5:
Equip Your Reps With The Right Tools to Follow Up Effectively

Once your marketing team drives in a lead, when should your salespeople follow-up? And just as important — what should they say when they do?
Many salespeople get stuck after handoff because they're unsure of what to do or say to leads who aren't quite ready. Make sure your sales teams are armed with the right data and intelligence to personalize their outreach and keep leads engaged.

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STEP 6:

Eliminate "Phone Tag" (and Relay Races)

There are several ways you can optimize your lead routing calls. The idea is to eliminate phone tag and prevent leads from being bounced around from rep to rep. Route leads based on:

- Their expertise in an industry or for a specific product.
- Sales skill (general inquiries go to inside sales, not field reps).
- Where the leads are in the world (using territories and regions).
- Activity and behaviors (recency, frequency, interactions with content).
- Size of the company (SMB, enterprise, startup).

STEP 7:

Implement Real-Time Tracking for Sales Follow-Up

You need a way to both track and measure sales follow-ups with leads. With the right CDP, you can. Here are some of the ways you can measure and monitor lead routing:

- Identifying where the lead is in the sales pipeline
- Pinpointing which industry vertical the lead is in
- Identifying what the lead's initial interest is
- Measuring the responsiveness of the salesperson (time-to-open and first follow-up)
- Using a marketing campaign or lead source
- Scoring and grading leads
- Creating forecasts for time-to-close and revenue

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BONUS:

Account-Based Routing

Not all calls and engagement are from prospects; some are already customers. Make sure to include them in your distribution flow.

For example, if a lead is identified as an account holder, then the lead should be routed to an account manager. However, if the customer is asking questions about other products or upgrades, then routing them to a sales rep that specializes in upselling and cross-selling to existing customers is ideal.

Your secret weapon for faster, more accurate and personalized lead routing and nurturing?