Account Engagement Automates… Lead Reassignment

Installation and Setup

1. Install the app here:
   a. What if existing component names conflict with ones in this package?
      i. We recommend “Rename conflicting components in package.”
   b. Select Install for Admins Only and Install.
2. Once installation is complete, click Done.
3. In **Salesforce Setup**, navigate to **Marketing App Extensions**.
   a. Click into the **Create Records from Account Engagement** app extension.
   b. Click into the **Related** tab.
   c. In the Business Units section, click **New**. Choose the business units that will use these App Extensions to create new records in Salesforce and then click **Save**.
4. In Account Engagement, navigate to where you’d like to call the External Action. External Actions can be called as a step in an Engagement Studio program or can be added as a Completion Action to various Account Engagement assets.

Introduction to App

Prospect records in Account Engagement sync to Salesforce when assigned an owner. And assigning each Prospect record as its created means you create a Lead at the beginning of the lifecycle, begin associating the lead with Salesforce campaigns, and report on the lead using Salesforce reports. But sometimes you don’t want to assign a lead directly to a BDR or sales person. You want marketing to nurture that lead first and then pass it to sales when the prospect shows enough interest in your product.

However, Account Engagement cannot change Lead/Prospect record ownership once it is assigned in Salesforce. The **Account Engagement Automates... Lead Reassignment** app allows you to send Lead records back through active Lead Assignment Rules in Salesforce and effectively reassign them as needed to support your lead lifecycle. In fact, you can use the app to support reassignment at various points in your lead lifecycle. This app allows Account Engagement users set automation to send a Prospect/Lead record back through Salesforce Lead Assignment Rules to support different marketing and sales motions at different lead stages.

We’ve included an example of how you could use this app and lead reassignment to support your lead lifecycle in the **How to Use** section below.

Customization

There is a minimal amount of setup required for the app to function. Following the instructions above to set up the app. **No additional customization is required for the app to function.** However, the app is intentionally an unmanaged package so that you can customize the Flow if needed.

How to Use

While no additional customization is required to use the app, we recommend that you **plan out in advance how you’ll use Lead reassignment to enhance your lead lifecycle**. Here’s an example:

1. A new prospect record is created when someone downloads a piece of marketing content
2. The prospect is assigned to a pre-sales or marketing queue and added to a nurture program in Engagement Studio
3. The nurture program logic periodically checks the prospect's score/grade, and if the prospect has reached a certain threshold, the next step in the program sends the prospect through the External Action included in this app to reassign the Lead
4. The Lead record is reassigned to a business development rep or sales team member who works the Lead
5. If the Lead isn't yet an Opportunity, potentially the Sales rep updates the Lead Status to Nurture, which signals the Lead to be reassigned back to a nurture or marketing queue

Steps 2, 4, and 5 represent potential rules in your active Lead Assignment rules.

The example above is a common pattern, but detail your lead lifecycle flow according to your organizations needs.

Considerations and Best Practices

- This app supports buttresses the idea that new Prospect records
- Out of the box, this app only works to re-assign leads via active Lead Assignment Rules in Salesforce. A prospect's lead ID is fed to a Salesforce Flow that sets the record to run through Lead Assignment Rules. All re-assignment logic is handled by the Salesforce Lead Assignment Rules.
- Since this app opens up Lead record assignment from Account Engagement beyond when a Lead is first created, you can assign Lead records to different Salesforce queues and users to correspond to your organization's lead lifecycle and business process. We recommend that you map out all requirements for reassignment throughout the lead lifecycle before creating Assignment Rules. (See the **How to Use** section above.)
- The best way to build the logic of your Lead Assignment Rules is to define each stage of your lead lifecycle and then define entry/exit criteria for each stage.
    - For example, the stages of your lead lifecycle could be something like Pre-Sales Nurture > MQL > Cold-Lead Nurture > Disqualified > Converted/SQL
    - Then the entry criteria for each stage could be defined like this:
        - Pre-Sales Nurture: Account Engagement Score < 100 — Assign to the Marketing Queue
        - MQL: Account Engagement Score > 100 — Assign to a BDR by the Lead's state or country
        - Cold-Lead Nurture: A BDR changes the Lead Status to Cold-Lead — Assign to the Marketing Queue
        - Disqualified: A BDR changes the Lead Status to Disqualified — Assign to the Disqualified Lead Queue
- You may define your lead lifecycle with stages that extend past the conversion of a Lead into an Account, Contact, and Opportunity. Lead Assignment Rules cannot set the record owner of Contacts, Accounts, Opportunities or any other object in Salesforce. It's best to define your full lifecycle, but you may need to rely on other automation or customize this app to support your full lead/customer lifecycle.
- You can use Completion Actions to assign directly to a Salesforce queue or user in conjunction with using the External Action included in this app to re-assign Lead records under certain conditions. For example, perhaps you assign new prospects who fill out forms for marketing content like a white paper directly to a marketing or pre-sales queue. At the same time, you can monitor for prospects owned by the marketing queue who have reached a certain score and use this app's External Activity to re-assign the prospect to a sales team member based on Lead Assignment Rules.
- Your lead assignment rules need to account for all lifecycle statuses and assignment requirements. However, the order of the rules may not reflect the order of your lifecycle.
- The app is left open so that you can adapt the app if you have additional logic you'd like to add. If your organization has other considerations or uses other automation other than Lead Assignment Rules, you may need to adapt the Flow to accommodate additional assignment logic.
- Test the logic in a sandbox before you implement the solution.

    - If you have access to an Account Engagement sandbox, fully conduct an end-to-end test by filling out a form, assigning a Prospect record, and simulating the changes to the Prospect/Lead record that would trigger reassignment based on your lead lifecycle definitions.
    - If you don't have access to an Account Engagement sandbox, test the Lead Assignment Rules in a sandbox, promote to production, and then conduct an end-to-end test.

Roadmap

- This is a living document. Future features and updates will be listed here.

Last updated - added steps for updating 'How to Run the Flow - System Context' due to errors for Opportunity & Case related flows
Last updated