



LEAD ASSIGNMENT STRATEGIES

WHITEPAPER

 Super Round Robin



Introduction

Effective lead management is crucial for the success of any sales team. This whitepaper explores practical strategies for improving sales team efficiency through the use of Super Round Robin, an advanced tool designed to automate and optimize lead assignment. By eliminating manual processes and ensuring leads are promptly distributed, Super Round Robin helps sales teams focus on what they do best: closing deals. Discover how this system can enhance your lead management practices and boost your team's productivity.

For questions, email us at support@plauti.com





SALES TEAM EFFICIENCY

Super Round Robin was created with efficiency in mind. You're using Salesforce, which probably means you have at least one sales team that deals with incoming leads. In the beginning, it is commonplace for leads to be placed into a Lead Queue by default, and then a Sales Manager might distribute them across the team. We've seen companies use spreadsheets to help them determine who should get the next lead!

You know this isn't good - recording information outside of Salesforce is a manual process. It's time-consuming and error-prone. It's too easy to lose track of people, teams, leads...

A successful sales team has a solid lead assignment process with intelligent automation.

Date	Lead Name	Sales Team	Sales Rep	Count
05/07/20	Mr Sam Smith	Eastern	Tom B	4
05/07/20	Laura Price	Eastern	Claire	5
05/07/20	Chris Pringle	Central	Rod	7
05/07/20	David Davis	West	Emma	8
05/06/20	Jack Cleeves	West	Tom R	8
05/06/20	Glenda Woods	West	Emma	9
05/06/20	Sarah O'Toole	West	Tom R	9



The first step is Basic Automation

Take away the manual process and Excel spreadsheets. Secret Spreadsheets must be banished!

Using a tool like Super Round Robin, you first automate the lead assignment process. Create your teams (MatchGroups), and specify what lead attributes will cause that lead to be assigned to that team (MatchRules). Include the Round Robin flag on your web forms to ensure web leads are processed in the same way. Now, the sales manager who was managing the spreadsheet can do something more useful!

Use Out of Office to manage availability

Part of Chatter that comes for free with the Salesforce platform includes a 'profile page' for every user (when they click their avatar). From there, they can set their Out of Office message. This feature needs to be enabled by the administrator under Setup > Chatter Settings.

The sales manager needs to make sure their reps are setting their availability; otherwise, they will get assigned leads when they are away.

Out of Office

Set Out-of-Office message

* Start Date 17 Jul 2020

* End Date 24 Jul 2020

* Message Out of Office: Jul 17 - Jul

Cancel Save



Cap leads to new or junior team members

A fairly normal scenario is that, for whatever reason, you may not want a sales rep's unread, new leads to get above a certain limit. Perhaps they are new and cannot deal with the normal rate of lead distribution, or it could just be a performance thing that you are managing. Use the MaxNewLeads setting to stop that team member from accumulating too many fresh leads.

	Assignee ID	User	MaxNewLeads	Send Email Notifi...
1	SRR000	Christine Lovell		<input checked="" type="checkbox"/>
2	SRR001	Ed Ralph	8	<input checked="" type="checkbox"/>

[View All](#)

If a user hits their limit of fresh leads, then as soon as they process some of them, Super Round Robin will continue to dish out new leads to them. It's all a case of keeping on top of your leads.

Work on new leads straight away.

This might sound obvious, but the quicker you contact a lead after it comes in, the more likely they will be receptive to your follow-up. This is why Super Round Robin was designed to process leads in real-time and assign them immediately. Furthermore, you have the option to ensure your sales reps have every opportunity to spot that a new lead has come in with the real-time email notification that includes a link directly to their new lead so they can get straight on with following up.

1 New Salesforce Lead Inbox x New LEAD! x

 **Ed Ralph** via rslie5z9xk97ey.4k-1mkguuaa.um6.bnc.salesforce.com
to gob@digitaldoctrine.co

Awesome! You have a new Lead in Salesforce:

Simpson: <https://um6.salesforce.com/00Q4K000001IHfwUAG>

Assigned to you by SuperRoundRobin

Try SRR 14-day free trial!