

Your Guide to Intelligent Lead & Case Assignment



How to automate lead and case distribution,
improve efficiency and increase sales



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Information Overload

The volume of inbound data is growing fast. Leads and cases are generated through digital channels – your website, social media, automated sales systems, instant messaging.

And however they've got in touch with you, your customers expect fast responses from the right people.

How can you share work between teams quickly, fairly and intelligently? How do you track response times to make sure no customers get left behind?

That's where intelligent assignment can help.



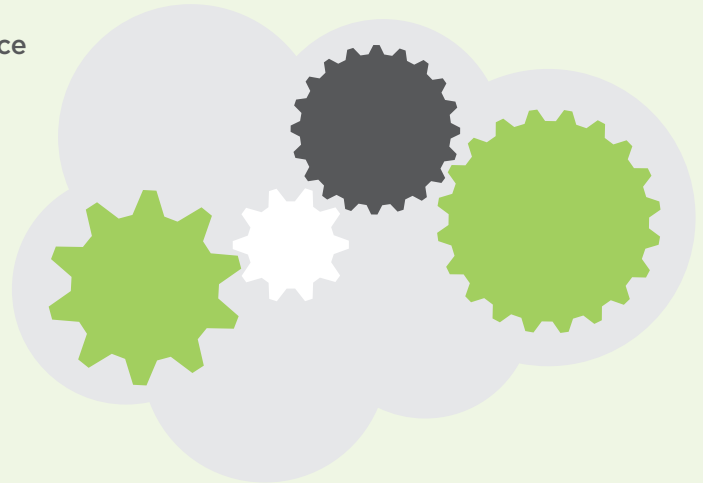
Working with Salesforce

Salesforce is a fantastic way to draw leads into your business – a cloud based CRM system that helps you create and manage great customer experiences. It's the perfect platform to build a powerful business, but it doesn't do everything on its own.

Salesforce integrates with many bespoke applications – lead and case assignment is an area where some businesses benefit from integration with another Salesforce App.

This guide illustrates the difficulties businesses face with dealing with large volumes of inbound data – and the impact this can have on performance.

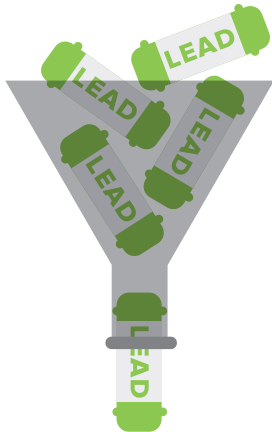
It will show you how automatic intelligent assignment can stop you from losing leads in your sales process, or losing customers once they're on board with you. And it will show you some real life examples of businesses that are reaping the rewards of automatic intelligent assignment.



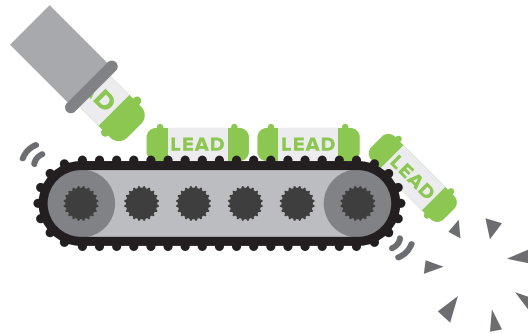
Your customer's journey

Where intelligent assignment can help

If you can't
sort your leads
fast enough



If things move
so fast you're
in danger of
losing business



When your leads
don't always go to
the best person



If there's no one
there to act on the
lead right away.
Wrong time zone?
Out of office?



If your
distribution
system is not
working fairly



When you lose leads
or cases in your system



If you've got to
get there faster than
the competition



Is this **you**?

Are you struggling to manage the workload between your sales reps/agents?

Scaling issues?

Trying to stay in control of a growing number of leads, cases, or team members?

Managing sales or support teams across time zones and territories?

Working against the clock? Because you know if you don't respond quickly the lead goes cold, or the customer feels let down.

Spending too much time
manually sorting
the right leads to
the right people?

**Looking for a way
to measure the
effectiveness of
your sales team?**

**Keen to apply
some logic to
your lead/case
assignment?**

What is **intelligent lead & case assignment**?

Intelligent assignment is a way for you to make sure you get the right salesperson onto a lead automatically (in Sales Cloud) or the right agent on the case (in Service Cloud).



**Get it right,
every time.**

- Intelligent assignment lets you **automatically distribute leads, cases or opportunities** depending on the needs of your business.



- Intelligent automation allows you to **automatically assign work to your teams, based on location, skills or working hours** (or whatever category works for you).



- Intelligent assignment is flexible. **As your business scales or changes, you change the rules**, and your system changes too.



- Intelligent assignment **plays to the strengths of your top performers**. You can see who's performing best, and assign your hottest leads to your best people.



6 ways intelligent lead & case assignment can **help your business**:



1. Improve time to contact

Your marketing automation tools are generating great leads – how can you be sure that the good ones get to your best people fast?

You know that in a competitive sales environment, speed is crucial. If your team doesn't react quickly, someone else will. Sorting inbound leads manually and getting them to the right person is time consuming. Leads can go cold, so you need to strike while the iron is hot!

It's a real fear for sales managers coordinating big teams – an amazing lead comes in – and gets lost in the pile. No one gets to it fast enough and the opportunity is lost.

An inability to contact leads in a timely manner could lose you business.

Intelligent assignment works with your marketing automation tools. Rate your leads, tag them in the system, and create rules

What our customers say

that automatically assign them to the best people to deal with them.

Do that, and then there's no chance of great leads missing the target.

Human error is eliminated, and your time is freed up.

“

Our response times are down.

We can get 1000 leads in at a time.

It used to take us days or even weeks to sort them through to the right sales person.

Now it happens automatically – with logic and precision.

”

*Robert Burkholder, Marketing Executive, **Connect America***



2. Help you scale your business



When it comes to building your business you'll know that attracting new customers is only half the battle.

What happens once you have a new lead? How quickly and efficiently can you get the right sales person on the job? And once you have a new customer, how can you respond efficiently to their support needs? Can you keep them happy?

And as the customers grow, and the business expands, how quickly can you employ more sales reps or agents before you need to employ more managers?

If your processes aren't scalable – if you're still at the stage of sorting leads manually – it can be very hard to move your business on to the next level.

Intelligent assignment means you can employ more reps and agents without more management.

And it means your managers can spend their time more profitably. They can focus on growing your business.

What our customers say

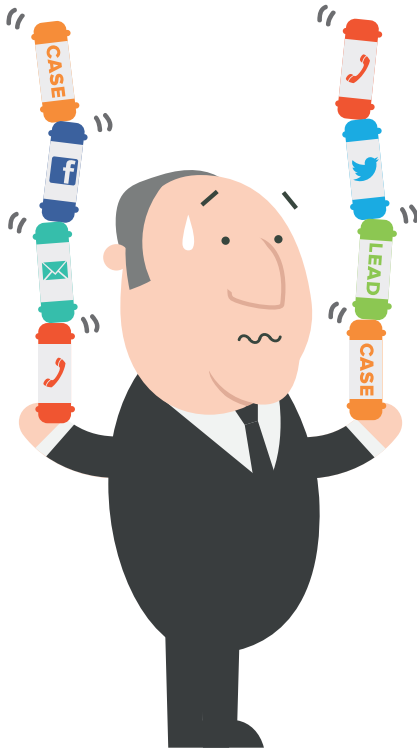
“

We needed to scale fast, we're a start up that's moving quickly. Distribution Engine has given us the ability to mobilise sales teams simply and easily. It's flexible and it grows with us.

”

*Bill Schwidder, Director,
Technical Program Management,
Salesforce Desk.com*





3. Get the right person onto the lead/case

Customers are savvy. It's likely that they'll know a lot about you and your products or services before they speak to you.

They'll have done their online research, and have some questions to ask. Being able to strike up a rapport on the phone quickly is important.

Your team has loads of expertise, and everyone is different; different skills, ages, experiences, strengths, and interests.

Intelligent lead and case assignment lets you make

the most of everything your sales and customer teams have to offer.

Utilising these different skills and playing to your team's strengths makes it easier for you to make a new sale, or keep the customer happy.

Using tagging in an intelligent assignment system allows you to choose precisely which people leads should go to. You can tag by language skills, time zones, product knowledge. Create your own tags, differentiate as deep as you like.

What our customers say

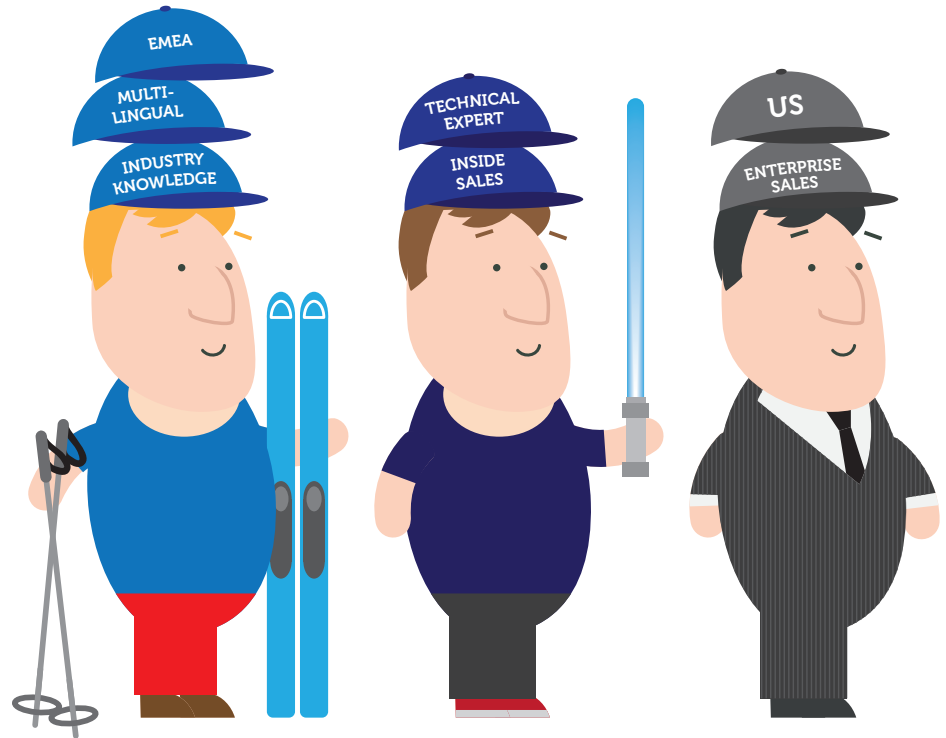
“

It's transformed the way we operate. Lead assignment is now easy.

It's given us the confidence to know that leads are going to the right person.

”

*Kim Geraghty, Director, Information Technology, **Computer Associates***



Intelligently determine the best rep for a lead

4. Make your process fair



**How do you choose which lead goes to which rep?
Is your lead distribution process smooth and fair?**

What often happens without distribution tools is that leads go into a general pot where they can be seen by all your reps. With everyone looking at the same list, you'll often find some reps cherry picking the ones they fancy, while others get left behind.

Intelligent lead and case assignment makes your system

fit and fair for everyone. Make it work the way you want it to. Set up a round robin distribution system, add in load balanced limits, and optional weightings. It means you can give more leads to your senior reps at the top of their game, and less leads to trainees while they're finding their feet.

If you make it predictable – and ensure everyone knows the rules, it will run more smoothly. Better for you, better for your business.

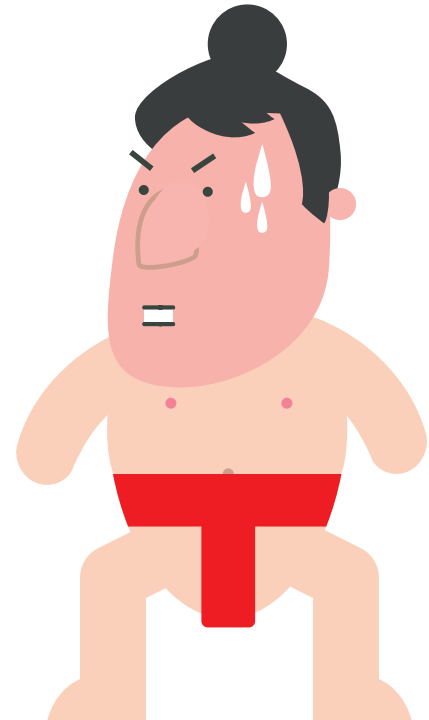
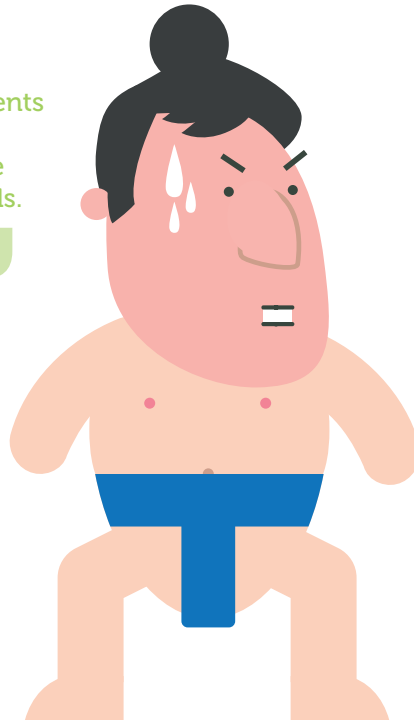
What our customers say

“

Round-Robin and weighted algorithms make our assignments to reps fair and transparent. This ranks among the absolute “Must Haves” of Salesforce tools.

”

Jason Paquette, Sales Operations Manager, **Simply Measured**





5. Give you control over lead & case assignment

How do you respond quickly to changes and opportunities?

Your business never stands still. New campaigns need to be scheduled, set in motion and acted upon fast.

With intelligent assignment you can create and adjust the rules in line with your business goals. At the touch of a button you can assign all the results of a successful one-off campaign to the best reps.

Intelligent assignment gives you the power to create rules, measure the results, adjust and repeat. Fine-tuning your sales process for continual improvement and optimal success.

What our customers say

“

We appreciate the flexibility it gives us. We can route leads in any field, provide any number of filters to make sure the lead is going to the right place.

”

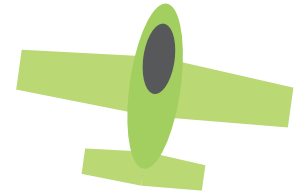
*Kim Geraghty, Director, Information Technology, **Computer Associates***

“

Distribution Engine is fast, easy to install and configure. We love this app.

”

*Bharti Hathalia, Sr. Project Manager, **Marketo***





6. Make it measurable

How can you improve your performance if you don't measure it?

Performance knowledge gives you control. Just like a good athlete trains with rules, measures what works, and adjusts and tweaks the training schedule accordingly, your business benefits from understanding what's working best, and doing more of the things that get results.

Do you know how well your team is performing?

Within each team, do you know who's performing best?

Intelligent assignment helps you identify the star performers and play to their strengths. And it shows up those who are falling behind, so you can put in measures to get them up to speed.

What our customers say

“

It gives us really useful
business information.

Now we can measure how
fast people are responding.

”

*Director of Customer Services,
Health Care Provider*



So what's **the answer?**

Assigning leads and cases manually is time consuming, costly and inefficient. It hampers growth, and can lose you sales.

Automatic intelligent assignment makes the process smoother, fairer, and more efficient. It frees up management time, and lowers management costs – giving you control over the process and the power to grow your business.

Distribution Engine is an intelligent lead and case assignment tool. Native to Salesforce – your data never leaves Salesforce – it works seamlessly to give you total control over your business.



Want to **talk?**

Contact us for a **free demo** or a chat about intelligent assignment for your business:

hello@nc-squared.com

Ready to **try?**

Download a **free 30 day trial** from App Exchange and we'll help you get started.

Find out **more**

Visit our website: **www.nc-squared.com**



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