

## FULL CIRCLE MATCHMAKER KEY FEATURES

- Automated lead-to-account matching, conversion and assignment
- Support for fuzzy matching
- Self-configurable rules engine for customizing your lead matching logic and prioritizing rules
- Configurable lead assignment rules for precise ownership of leads by sales rep
- Account Activity Ratings to provide visibility into account performance
- 100% native to Salesforce
- Fully self-installable by a Salesforce administrator

## DATASHEET

# Smarter Account Engagement with Full Circle Matchmaker

Need a better way to engage your accounts but having trouble connecting your leads to accounts in Salesforce®? Check out Full Circle Matchmaker, built by Salesforce veterans to help you drive your account prospects to a close through precise lead ownership and engagement.

### A Complete Account Picture with Lead-to-Account Matching

Full Circle Matchmaker connects leads to accounts to add the full context of accounts to your lead engagement. With the lead records linked to accounts, enable your team to market and prospect each lead with targeted engagements and create reports to measure account targeting effectiveness. Finally, empower your organization with comprehensive account visibility and measurement.



FULL CIRCLE INSIGHTS  
Matched Leads

See matched leads on your accounts and report on account engagement

<input type="checkbox"/>	NAME	COMPANY	TITLE	PHONE
<input type="checkbox"/>	Malachi Hurley	AK Steel Holding Corp.	Marketing Operations Manager	1-250-
<input type="checkbox"/>	Norman Dudley	AK Steel Holding Corp.	Partnership Manager	1-682-
<input type="checkbox"/>	Rebekah Summers	AK Steel Holding	Project Manager	1-961-
<input type="checkbox"/>	Xander Rasmussen	AK Steel	Account Executive	1-696-

### Lead Conversion and Assignment to Account Owners

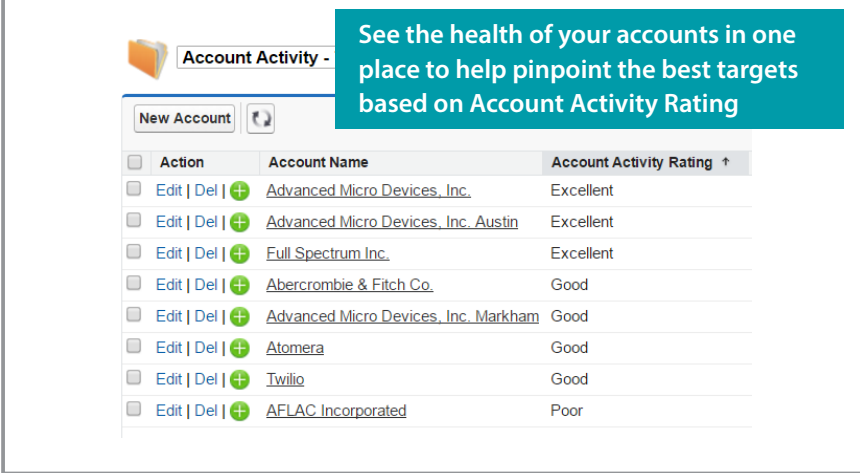
Turn a lead response into a targeted engagement. Full Circle Matchmaker assigns leads to the right account owners using configurable rules to automatically route to the correct salesperson. Set auto-conversion rules to manage your leads and contacts in your CRM. With Full Circle Matchmaker, enable your teams to engage leads with the right messaging at the right stage to accelerate and close deals.

Auto-convert and bulk-convert leads, and assign them to the right sales rep for consistent targeted account engagement

		Convert Leads	Incorrect Match
PHONE	EMAIL	OWNER	STATUS
1-604-1858	malachi.hurley@aksteel.com	Maria SDR	Nurture
1-731-6454	norman.dudley@aksteel.com	Maria SDR	Not Engaged
1-845-7172	rebekah.summers@aksteel.com	Maria SDR	Not Engaged
1-814-0612	xander.rasmussen@aksteel.com	Maria SDR	Open - Not Contacted

## Actionable Account Data at Your Fingertips

Want to see how you're doing with your accounts? Trying to pinpoint the neglected target accounts in your CRM? Full Circle Matchmaker gives you essential visibility on your account engagement through an account list view that shows your Account Activity Ratings. In one place, your sales and marketing teams can better understand and track the health of your company's accounts.



See the health of your accounts in one place to help pinpoint the best targets based on Account Activity Rating

Action	Account Name	Account Activity Rating ↑
Edit   Del   +	<a href="#">Advanced Micro Devices, Inc.</a>	Excellent
Edit   Del   +	<a href="#">Advanced Micro Devices, Inc. Austin</a>	Excellent
Edit   Del   +	<a href="#">Full Spectrum Inc.</a>	Excellent
Edit   Del   +	<a href="#">Abercrombie &amp; Fitch Co.</a>	Good
Edit   Del   +	<a href="#">Advanced Micro Devices, Inc. Markham</a>	Good
Edit   Del   +	<a href="#">Atomera</a>	Good
Edit   Del   +	<a href="#">Twilio</a>	Good
Edit   Del   +	<a href="#">AFLAC Incorporated</a>	Poor

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Matchmaker is a foundational element to our Account-Based Sales and Marketing efforts. With it, our sales team can now save countless hours per week and our marketing efforts can now be hyper-focused on individual accounts.

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**Bryant Lau**  
Senior Digital  
Marketing Manager  
Highspot

## Intelligent and Self-Customizable Lead Management Technology

Full Circle Matchmaker is easily self-configurable through a simple UI. With a few dropdowns and drag-and-drops, customize the underlying logic through a built-in intelligent matching rules engine and intuitive assignment and conversion settings. Whether you prefer a more out-of-the-box setup or tweaking the rules to fit the workflows of your business, Full Circle Matchmaker was built to ensure that the matching, conversion, and routing fits your unique needs.

A few of the self-customization features include:

- Enabling and disabling of Matchmaker flows at the click of a button
- Drag-and-drop rule prioritization for "tie-breaker" lead matching logic
- Email domain matching logic with exclusions for popular free email services
- Dropdowns for precise lead assignment to sales owners with support for exclusion rules
- Definitions for responses and response types in Account Activity Ratings
- Batch scheduling and one-time batch running

## Engage Smarter and Turbocharge Account Effectiveness

As a native Salesforce application, Full Circle Matchmaker is easy to administer and implement, so you can get up-and-running and make an immediate impact on revenue! Finally, connect the dots between leads and accounts. Engage smarter. Measure completely. Check out a quick demo today! Find out more at [www.fullcircleinsights.com/products/matchmaker](http://www.fullcircleinsights.com/products/matchmaker).

### For more information:

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