Customer Case Study:
Kareo

Kareo are a provider of cloud based medical practice software. They use Distribution Engine to assign leads, opportunities and support cases.

Business Issue to Solve

Kareo use a number of channels to generate Leads. Some channels provide higher quality leads, some provide higher volumes of leads. Manually assigning these in a fair and consistent manner to avoid causing friction within the Sales team was a challenge. In addition, some senior reps had higher quotas and therefore required more Leads, other reps had specific skills which meant Leads should be matched to them. Managing this process was manual, time consuming and inconsistent.

Distribution Engine Implementation

Kareo selected the Distribution Engine to automate the process of Lead assignment. The Distribution Engine automatically assigns Leads in a fair round robin fashion to reps taking into account skill / account speciality and lead source. Using the Weighted Round Robin feature of the Distribution Engine enables Kareo to allocate greater numbers of Leads to senior reps.

Integration with Other Systems

The Distribution Engine can distribute Leads created by other systems. Kareo generates Leads from a number of sources: **Marketo**, **Live person** chat and **Demand Tools** uploaded spreadsheets. These Leads are automatically placed into Salesforce Queues before being assigned out by the Distribution Engine to the reps.

Distribution of Other Objects

Since implementing the Distribution Engine Kareo has expanded its remit to automate the distribution of Opportunities and Cases.

Benefits of Distribution Engine

ADMINS

○ Single system for automated assignment of Leads, Cases and Opportunities.

○ Seamless integration with external systems.

○ Reduced Salesforce complexity – fewer workflow rules.

○ Day to day maintenance: automatically caters for sick days / out of office.

MANAGERS

○ Time saved no longer manually assigning cases. Allows managers to be much more productive and drive the business.

AGENTS

○ Ensure fairness of lead assignment.

○ Ensures leads are assigned quickly.

EXECUTIVES

○ Faster Lead response times, increased conversions.

○ Visibility of productivity and workload via analytics and dashboards.

What's Next For Kareo

Kareo are a rapidly expanding company – they have been featured on Forbes Most Promising Companies list. Distribution Engine enables them to scale their teams without needing to hire and train additional managers for assigning their Leads.

"The app will allow you to dynamically assign and reassign leads, a sales organization's most precious asset besides its sales team, in probably just as many ways as your business model demands and you can dream of."

Veronique Barth , Kareo