



Distro Workflow: Route + Assign Qualified Leads

Distro ensures all qualified leads are routed and assigned to the right rep in your CRM.

The route starts once there's a trigger event.



A trigger event can occur when a field is updated or a new record is created in Salesforce.

Ex: Lead score is updated to > 50
(this can be set to any number)

Additional conditions can be added to validate the lead is qualified before the route starts.
Ex: Company size > 10 AND Lead status ≠ Unqualified

✓

QUALIFIED

If the lead passes the qualification criteria, the route is started.

✗

UNQUALIFIED

If the lead does not pass the qualification criteria, the flow stops here.

Qualified leads are distributed to the appropriate team members, which can be based on segments.
Ex: Distribute leads based on company size

SMB Team

Company size < 50

Round robin to the following team members

Mid Market Team

Company size = 50-1,000

Round robin to the following team members

Enterprise Team

Company size > 1,000

Round robin to the following team members

The appropriate rep is notified via Slack and email when a lead is assigned to them for follow up.

