

Call Attempt-Based Lead Disqualification & Campaign Prioritization

Introduction

To streamline outbound calling efforts and improve lead management efficiency, we implemented a tightly integrated solution between Salesforce and Five9. The primary objective was to accurately track call attempts, automatically disqualify leads after a predefined threshold, and ensure consistent data across both platforms. This helped prioritize campaigns more effectively, reduce time spent on non-viable leads, and enhance overall data integrity. The result is a more focused sales process, with a clear, synchronized view of lead activity and status.

Client Overview

Industry: Utility and Waste Management

Salesforce Products Used

Salesforce
Sales Cloud

Apex
Triggers

Task
Management

Custom
Metadata

Campaign
Management

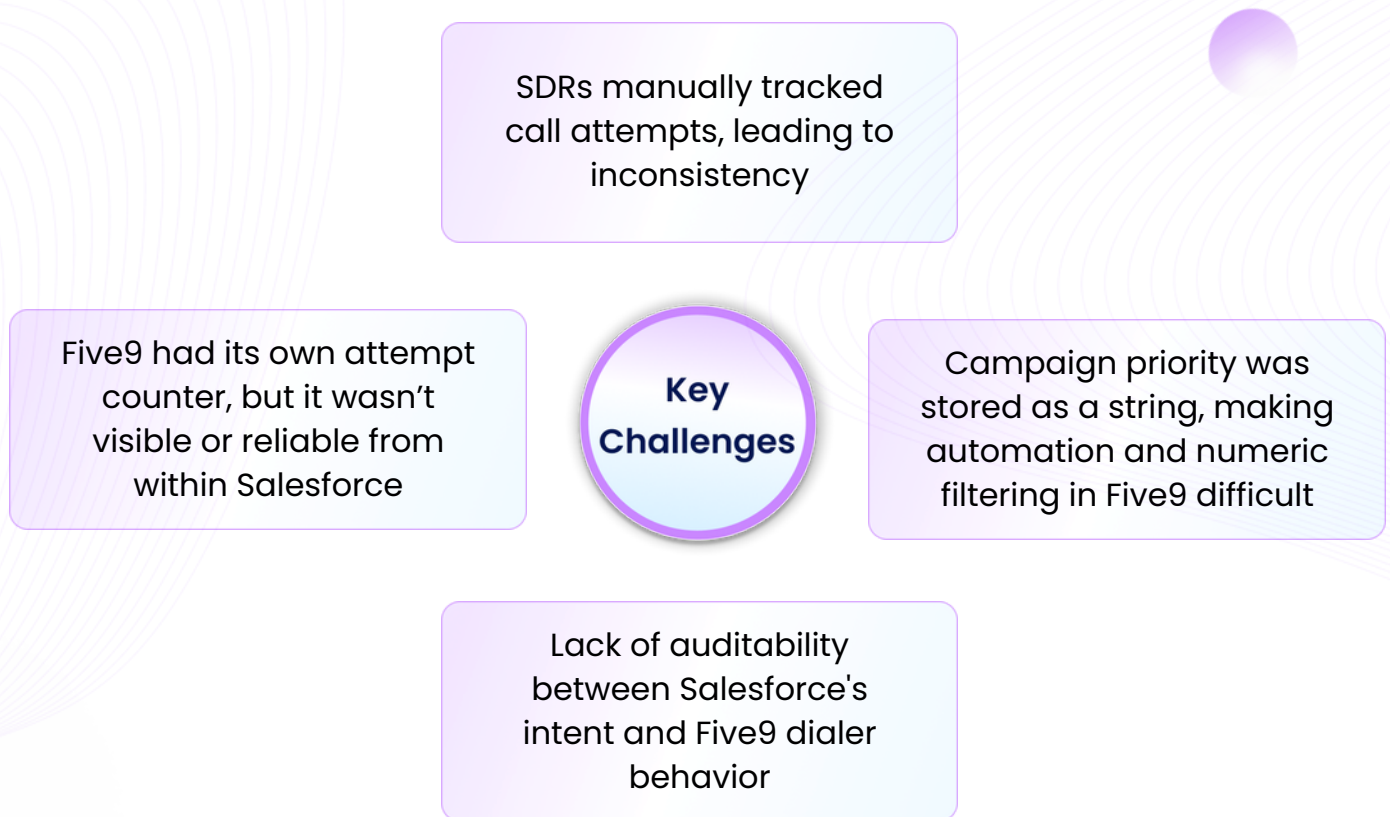
Five9 CTI
Integration

Business Requirements

The Client needed to enhance lead quality control and dialing efficiency for SDR agents by automating lead disqualification after a set number of call attempts and enabling proper campaign prioritization within the Five9 dialer system.

- The business goals were:
 - Disqualify leads after 8 outbound call attempts.
 - Ensure prioritization of leads based on campaign importance.
 - Improve data sync between Salesforce and Five9 for troubleshooting and dialer filtering.

Challenges Faced



Solution Architecture

Accurate Call Attempt Tracking

- Outbound call attempts are tracked only when triggered by real Five9 dialer activity.
- A custom mechanism ensures that only genuine Five9 calls increment the attempt counter on the Lead record.

Automatic Lead Disqualification

- Once a lead reaches 8 call attempts, it is automatically:
 - Marked as "Disqualified"
 - Removed from active campaign memberships
 - Flagged for exclusion from future dialing in Five9

Campaign Prioritization for Dialer

- A numeric priority field is added to each campaign.
- This priority helps Five9 decide which leads to dial first based on campaign importance.
- Simplifies dialing logic across systems.

Seamless Data Sync Between Salesforce and Five9

- Key custom fields like call attempts, disqualification flags, and campaign priority are shared with Five9.
- Enables consistent lead status visibility across both platforms.
- Helps support teams diagnose and resolve data mismatches more effectively

Business Outcome

Objectives

Track call attempts accurately
Disqualify after max attempts
Reflect Salesforce status in Five9
Prioritize campaigns in Five9 effectively
Reduce SDR time spent on dead leads
Improve data integrity between systems

Outcome Achieved

Trigger increments counter only for real Five9 calls
Leads auto-disqualified after 8 attempts
Sync fields ensure shared visibility
Numeric priority simplifies dialer logic
Only viable leads remain in dialer queue
Single source of truth for call count and status