

# Lead Disqualification & Campaign Automation

## Introduction

To improve the efficiency of Sales Development Representatives (SDRs) and maintain high campaign hygiene, we implemented an automated lead disqualification process integrated with the Five9 dialer platform. The objective was to instantly remove unqualified leads based on predefined disposition logic, streamline exception handling for web leads, and provide end-to-end visibility through logging and audit trails. This solution ensures SDRs spend time only on quality leads, enhancing productivity while maintaining a clean, real-time lead pipeline.

## Client Overview

Industry: Utility and Waste Management

### Salesforce Products Used

Salesforce  
Sales Cloud

Apex  
Triggers

Campaign  
Management

Five9 CTI  
Integration

Custom  
Metadata

Lightning Email  
Templates

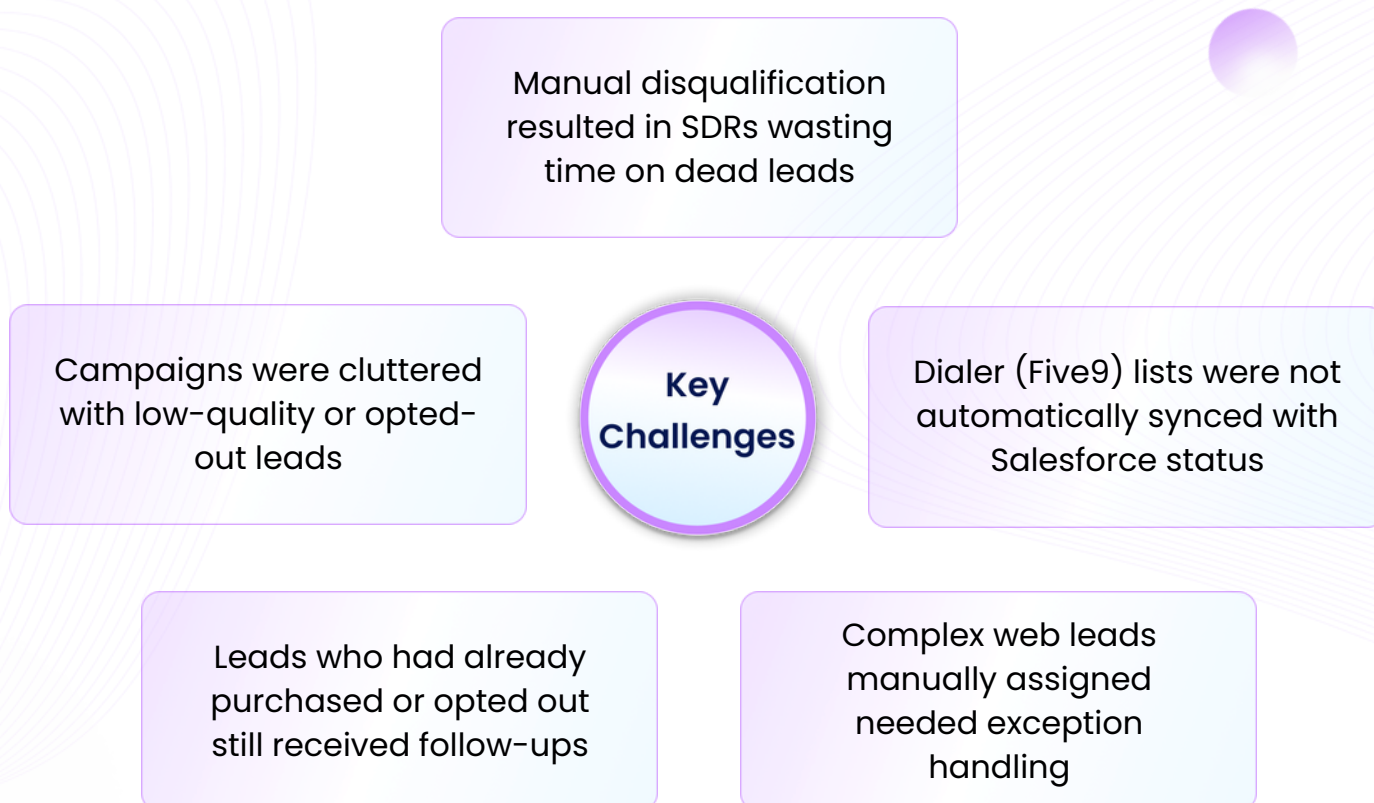
Reports &  
Dashboards

## Business Requirements

Client needed to **automatically disqualify or re-route leads** based on specific **disposition outcomes** and **business rules**, ensuring that inbound sales representatives (SDRs) focus their time only on high-quality, viable leads.

- Key requirements included:
  - Auto-disqualification when a lead hits a dead-end disposition
  - Auto-removal from dialer (Five9) when disqualified
  - Campaign routing for nurture or follow-up
  - Triggering all of this via Apex, not manually or via Flow

## Challenges Faced



## Solution Architecture

### Lead-Based Automation

- A rules-driven trigger was implemented to monitor key lead fields
- Automatically updates lead status to Disqualified, Nurture, or Follow-Up
- Removes disqualified leads from active campaigns
- Adds relevant leads to nurture campaigns
- Captures and logs the reason for disqualification or rerouting

## Dialer Integration with Five9

- Automatically notifies Five9 to remove leads when certain conditions are met
- Ensures leads marked as "Do Not Call" or those exceeding dial limits are promptly dequeued
- Communication handled seamlessly via middleware integration

## Smart Campaign Management

- Disqualified leads are instantly removed from all sales campaigns
- Leads in nurturing stages (e.g. "Quote Sent", "Order Pending") are added to dedicated nurture campaigns
- Prevents duplicate campaign memberships for cleaner tracking

## Web Lead Exception Handling

- Special rules in place for manually assigned web leads
- These leads bypass the auto-disqualification logic
- Routed to SDRs for manual follow-up without interference from the dialer system

## Business Outcome

### Objectives

Automate disqualification process  
Remove leads from dialer (Five9) instantly  
Campaign hygiene and lead list quality  
Improve SDR focus and productivity  
Handle manual web lead exceptions cleanly  
Track and audit automated actions

### Achieved Results

Trigger removes leads based on disposition logic  
Triggered API/middleware call to dequeue dead leads  
Campaign members updated real-time via Apex  
No time wasted on unqualified leads  
"Other" disposition bypasses disqualification logic  
Custom log object enables full visibility