DATA SHEET

LEAD ROUTER

B2B LEAD ROUTING

Vyakar's Lead Router helps solve your lead routing needs based on your desired business rules and organizational structure without the attendant technical complexities. It integrates cutting-edge AI-based Machine Learning business-use cases and a lead-account matching engine into a single solution, thus simplifying and standardizing the implementation of your routing rules for businesses.

The Lead Router's data normalization and standardization routine augments the data supplied with clean data to better detect the industry, company size, and geographical territory for a complete data-driven routing experience.

LEAD ROUTING USE CASES

The Vyakar Lead Router is made to address almost every possible lead routing scenario. From elaborate product portfolios, extremely diversified sales organization, or numerous customization requirements at data or rules levels. Vyakar Lead Router salient features include the following:

- Data Normalization
- Unified Data Dictionary
- Partner Lead Routing
- Account Based Lead Routing
- Opportunity Status Based Lead Routing
- Competitors Scrubbing
- Product Line Based Lead Routing
- Direct pass thru to Sales Rep on record

- Campaign Type and Name
- Company Profile Based Lead Routing
- Advanced geographical mapping
- Setup global routing preferences

SALIENT FEATURES
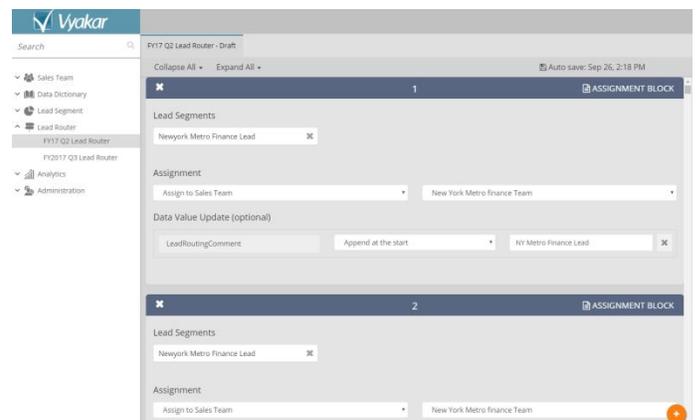
EASY CONFIGURATION

Vyakar lead router is easy to configure using simple drag and drop UI. No need to create complex code, or often confusing flow charts.

SALES TEAM

Define sales team as per your routing requirement. You can decide to route to an individual, a queue or a team of sales people in round robin way. Lead Router periodically checks for the active status of sales people, and will generate an error notification should a routing rule become invalid due to deleted/removed sales people.

UNIFIED DATA DICTIONARY

Vyakar Data Dictionary is a common place to define and implement business acronyms commonly floating around in presentations and spread sheets. Business users can truly connect the business definitions to related data and review the results. System data dictionary augment the user data dictionary to provide more streamlined and sophisticated approach to lead routing.
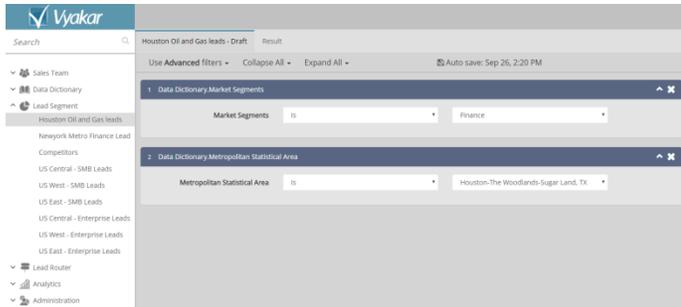
ADVANCED ACTIONS

Lead router can be configured to convert a lead into contact should business desire so, usually in case of an existing open opportunity. Also, add a lead routing note on the lead records when routing for a specific cause or campaign.

IN-DEPTH REPORTING

Reports are designed to provide ongoing performance as well historical tracking. You can generate report by

- Active Lead Router
- Individual Assignment Rule
- Error Report by Assignment Rules

DATA STANDARDIZATION

Vyakar Lead Router is powered by an intelligent data standardization engine.

- Industries are automatically mapped based on the SIC, separating some of the more standard drop-down categories like "manufacturing" or "services".
- World-wide mapping for city-metro area-state-country categories is available to avoid cumbersomely making routing rules via zip code.
- Employee size and revenues are standardized into the suitable category.

COMPANY NAME MATCH ALGORITHM

Lead routing is incomplete and not effective without an efficient way to match leads against existing account/company name. Vyakar's Lead to account fuzzy matching engine uses machine learning-based and dictionary based algorithm. Fuzziness can be configured according to your necessary requirements. An option for creating custom rules is also available, thus allowing for the honoring of some common company-specific matching rules. The following are likewise provided:

- Ignore company suffixes
- Match popular acronyms
- Match popular nicknames
- Match based on web domain
- Fix special characters
- Geo Sensitive Match
- Custom "Always/Never" Match rules
- Mergers and acquisition match

AVAILABLE INTEGRATIONS

Vyakar Lead Routing engine is a platform independent of any other existing Marketing Automation system or CRM. Natively integrated with SalesForce.com, it can also be integrated with other CRMs with the supporting API. The following integration schemes are supported:

- Salesforce.com
- Other CRM using custom API
- Marketo Webhooks
- Eloqua Cloud Connectors

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