

Lead Routing & Ownership

Inbound Routing

All inbound leads are scored and routed to the inbound BDR team through a round robin. This includes all leads in both the growth and strategic segments, and in all HQ locations.

Outbound Routing

Outbound BDRs work out of their territory (currently East & West U.S.)

[Screen Shot 2023-04-20 at 9.10.05 AM.png](#)

Routing Updates & Round Robin

All new leads that are 1. from an inbound lead source and 2. have reached a high enough lead grade will route to an inbound BDR in our SF round robin queue.

Exceptions for RR:

- Chat
- Software Advice
- Direct booking

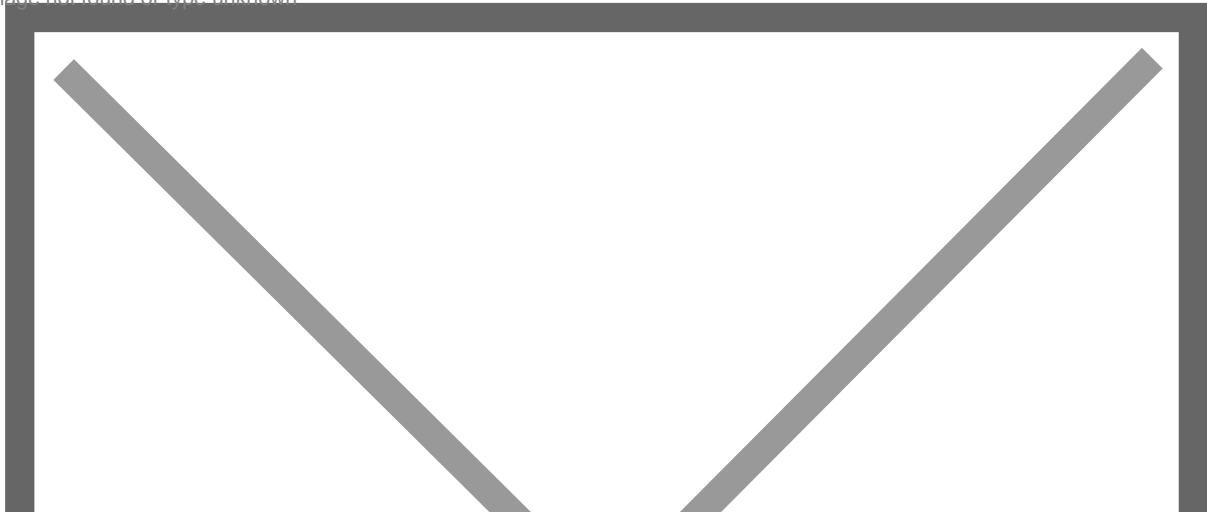
These have their own RR/ routing process and will still be distributed evenly. For example, if you see a direct book you won't have to worry about it being routed to a different BDR when the lead is created in SFDC.

Lead Ownership Approvals ("Request Ownership")

When you need a lead to be moved into your name, you'll need to request ownership of the lead. This is to ensure leads are accurately distributed, and you can review your own past leads for pitch miss/ re-engage

without another rep mistakenly reaching out.

Image not found or type unknown



After clicking “Request Ownership”, you’ll be taken to the lead approval screen flow. Here you can select the correct person to move the lead to (yourself or another rep), as well as add notes for the reason they need ownership.

age not found or type unknown



The record will be locked when an approval is pending.

Lead owner will change when approved (whichever user you've chosen in the lead approval screen flow).

Revision #1

Created 24 April 2023 18:12:00 by Kaitlin Bell

Updated 24 April 2023 18:38:41 by Kaitlin Bell