

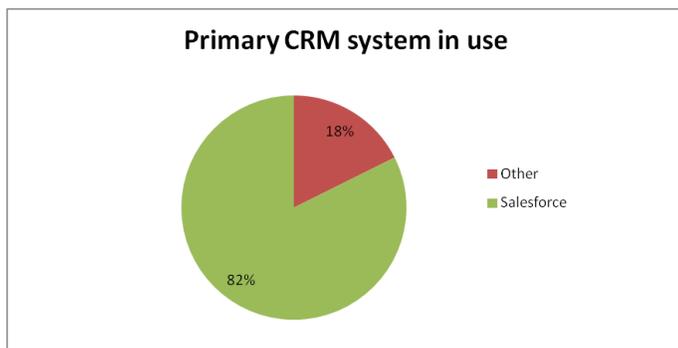
# LEAD ROUTING SURVEY – RESULTS ARE OUT!

## ABOUT THE SURVEY

Late in 2017 and early 2018 we surveyed B2B marketing and sales operations leaders for their opinion and wants on future of B2B lead routing. Survey was promoted on our corporate website, search engines and across social media platforms. It is possible that survey results are skewed in favor of active online users as no offline response was collected. We thank our survey participants and happy to share the results with sales and marketing community.

## CRM SYSTEM IN USE

Overwhelming number of responders said they use Salesforce.com as their primary CRM tool. Other non-SFDC users are also heavily leaned towards SaaS based solutions. Most of the non-SaaS solution appeared to be legacy install. All of it makes more sense because SaaS platform by definition offers better integration with 3<sup>rd</sup> parties and is more value for money.

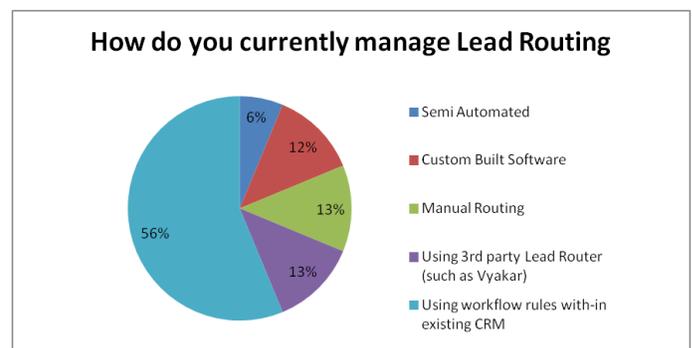


## CURRENT LEAD ROUTING SCENARIO

This may surprise a few, but not all. A significant number of organizations are still manually routing B2B leads. Considering manual lead routing takes days (if not weeks), the process seems to be highly inefficient.

Almost half of responders said they are using SFDC’s lead assignment rules for lead routing. Considering other half is not using these SFDC assignment rules, it underscores the fact that SFDC’s assignment rules are not the best solution for lead assignment for many.

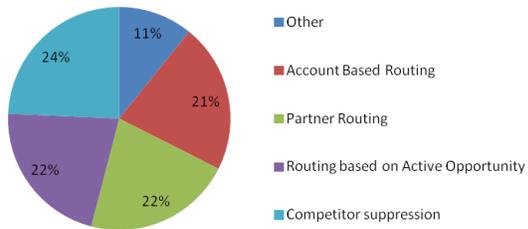
Many organizations have evolved to develop in-house lead routing solution as well, may be expensive by efficient that SFDC’s assignment rules.



## DESIRED LEAD ROUTING FEATURE

Participants were asked to choose some of the highly desired lead routing features they would like to add to existing implementation. The top 4 highly desired features account from almost 89% of the responses.

### Desired B2B Lead Routing features



As Account Based Marketing is gaining traction, marketers and sales would like to route leads based on account, as well as use account's status (i.e. active opportunity in play). Lead to account matching is certainly going to play an important part of routing protocols going forward. As always, there is a perpetual need to suppress competitors and route partner leads to their account managers.



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