Buyer's Guide to Lead-to-Account Matching in Salesforce

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While there are more sources of leads today than ever before, this creates a problem: the loss of connection between individual leads and the accounts they represent. With the disconnect in the CRM, fixing this manually requires dedicating personnel time and resources. So, turning to technology is a natural alternative to maximize revenue productivity and reduce data cleaning. To ensure you are looking for the right lead-to-account matching solution for you, Full Circle Insights is providing this guide to inform you of key features of premium solutions and their benefits.

Creates Matches Within Salesforce Database

To best arm your sales reps, you want to have a real-time, single master of record for leads and accounts. And though you may be utilizing various data sources for leads and accounts that your reps prospect, for single source of reporting you will ultimately want to connect the dots between leads, contacts, accounts, opportunities, and revenue all in your Salesforce CRM.

Fuzzy Matching Logic

A human being is quite skilled at identifying two company names, such as "Lex Corp." and "Lex Corporation", as likely referring to the same company. A computer seeking exact matches would see these two as different. In practice, fuzzy matching is a type of logic that softens the matching criteria in order to identify two companies in your CRM with similar names and profiles to likely be the same company (merely spelled a little differently or with a few letters added, such as "Inc."). Built-in fuzzy matching should be table stakes for a sophisticated lead-to-account matching technology solution. This significantly increases the automation factor you are seeking in a solution that is supposed to turbocharge your sales productivity and reduce manual work.

Automated Lead-to-Contact Conversion

Since Salesforce separates leads and contacts into two different databases, many companies resort to manually converting leads into contacts, in order to tie those individuals to the account and deal opportunity. Look for a solution that can automate this conversion according to your needs and usage of these two database types.

Assignment of Lead Ownership

Make sure the lead-to-account matching solution you evaluate includes the feature of modifying ownership of leads, in order to override any prior lead owners with those appropriate for the account. You'll also want the solution to support rules for assigning leads that do not match to any existing accounts.

Account Activity Ratings

Naturally, with leads matched to accounts, you have the potential to report on your effectiveness in account engagements. Your lead-to-account matching solution should include a quick summary view of your accounts, rated by your engagement or account activity. For example, you may want to know which of your accounts (including all matched leads) have not been engaged with in the past three months. Also, look for the ability to customize and define activity ratings for your business that help you gain a view of your accounts' health.

Configurable Rules with Prioritization and Exclusions

Different businesses have different sources of leads and accounts that enter into the CRM. One-size-fits-all matching logic is inferior to a matching system that is self-configurable. Look for product capabilities that allow you to prioritize certain matching rules and handle tie-breakers. Also, the ability to exclude certain types of leads is helpful to further align the matching logic to your needs.

On-Demand Overrides, Bulk Unmatching, and Enable/Disable

Obviously, you want a lead-to-account matching solution that is perfect, but invariably you will encounter incorrect matches. This may even happen due to a lead who had changed jobs. Look for a solution that allows you to override matches with the click of a button. You will also want this ability for unmatching a large set of leads right on the Account View in Salesforce. And finally, for whatever reason, you may want to press pause on lead matching or disable auto-conversion or assignment, so look for that capability.

Self-Customization and Simple Self-Implementation

With any technology solution, you want to gain immediate value. Find a lead-to-account matching solution that you can customize yourself and implement very quickly, without needing to make a phone call to the vendor's tech support. The flexibility to make changes to settings on-the-fly is the hallmark of a product built with a focus on user experience and needs.

Lead-to-Account Matching Buyer's Checklist

	Key Feature	Benefit
☐	Creates Matches Within Salesforce Database	Single master record for leads and accounts, and sales alignment when leads are passed from marketing
☐	Fuzzy Matching Logic	Matches even with different company naming in your CRM
☐	Automated Lead-to-Contact Conversion	Manage across leads and contacts in your CRM
☐	Assignment of Lead Ownership	Rules-based owner assignment for precise account engagement
☐	Account Activity Ratings	View health of accounts and the engagement levels in one place
☐	Configurable Rules with Prioritization and Exclusions	Every matching, conversion, and assignment workflow fits your process and lead handling protocols
☐	On-Demand Match Overrides, Bulk Unmatching, and Enable/Disable	Greater level of control, useful for periodic match evaluations or bulk list uploads
☐	Self-Customization and Simple Self-Implementation	Massively reduced time to value and independence from vendor resources

About Full Circle Insights

Full Circle Insights delivers marketing and sales performance measurement solutions and lead management technology for driving more revenue. Our cloud-based products provide actionable intelligence to optimize a company's marketing mix and drive more revenue. The company built its products 100% on the Salesforce App Cloud and are compatible with the leading marketing automation solutions.

Founded by former Salesforce executives and implementation veterans, CRM product managers, and marketing automation specialists, the Full Circle Insights industry pioneers and thought leaders know what it takes to run a successful marketing organization. The team is passionate about giving data-driven marketers the answers they need to uncover a marketing campaign's impact to the business, plan with confidence, and grow revenue. Learn more at www.fullcircleinsights.com.

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