



Lead-to-Account Matching Buyer's Checklist

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

Give your leads the complete account picture in Salesforce.
Learn more at: www.fullcircleinsights.com/products/matchmaker