LeanData Customer Self-Implementation Guide

Lead Routing, Matching and View Implementation

Overview

Welcome to LeanData! We're excited to have you as a customer and hope that you enjoy our products and realize great business efficiencies and improvements from using them.

The following document guides new customers of Lead Routing, Lead to Account Matching and View on getting educated about LeanData's products as well as implementing the products independently. For questions and assistance during the self-implementation process, please reach out to implementationhelp@leandatainc.com.

Learning Resources

- **LeanData Help Center** - Find product documentation including user guides, FAQs, release notes and more!

- **LeanData University** - LeanData's video learning content which includes high level product walkthroughs as well as deep dives. A Login and Password will need to be created when accessing for the first time.

Getting Started

Now that you're a LeanData customer, the first step will be a quick kick off call to get things started. On this call, you can expect to meet your Implementation Advisor, discuss the typical implementation flow, and get helpful information on resources available to you.

Action Items Prior to Kick Off Call:

✓ Download the LeanData App in both Production, as well as the Sandbox you plan to test in. Instructions can be found in the Managed App Install Guide.
  - *Wondering what data is needed within the Sandbox you use? If you have access to a full Sandbox, this will be the best for testing. If not, then a partial or empty Sandbox will work too - as long as the Fields and Users have been recently refreshed to mirror Production.*
✓ Grant API Access to LeanData, configure LeanData Tab visibility and LeanData Permission Sets. Guidance on these three items can be found in the LeanData Admin Guide.
✓ Ensure anyone configuring LeanData, including System Admins, have the **LeanData Custom Objects Full Access Permission Set**.

✓ Please email implementationhelp@leandatainc.com to confirm once the steps above are done, or if you have any questions. Once the steps above are completed, your Implementation Advisor will be able to enable (but not deploy) your LeanData products, so you can start configuring.

LeanData View Implementation

Now that you've completed the steps above, it's time to start learning about LeanData as well as installing your first product - the LeanData View. The View is a fast and easy install and will provide a quick win that your team can start using right away. The View is frequently used by Sales teams in order to get more context about the Leads, Accounts, and Contacts, they are working. This tool also allows for some light manual cleanup with an Actions section that allows users to merge duplicates and convert Leads into Contacts under a matched account. This Actions section can also be removed, per your organization's preferences.

When installing the View, it's important to consider your Users' experience. If you use different page layouts depending on the User Profile, you should consider which User Profiles can benefit from getting this on their Lead, Contact, and Account page layouts.

Resources

Please review the following resources to help with your LeanData View deployment:

1. LeanData University - Review the course [01-LeanData Fundamentals - Matching & View](#).
2. [LeanData View - Product Overview](#) document.
3. [LeanData View - Setup Instructions](#) document.
4. [LeanData View - Settings Guide](#)

Action Items - LeanData View

✓ Decide whether to install the View for all Layouts or a subset.
✓ Decide whether the default setup works for your org or if you'd like to customize columns or remove certain sections.
✓ Configure according to the [Setup Instructions](#) document.

LeanData Matching/Tagging Implementation

As part of the Matching/Tagging product, LeanData matches Leads to Accounts and forms a link between the Lead and Matched Account by populating an Account Lookup field on the Lead. In addition to populating this Lookup, called "Reporting Matched Account", LeanData is able to map any desired Account field down to a corresponding Lead field - this process is called Tagging.

Setting up Matching will require you to consider two things. First, what rules would work best for your organization around how Leads should be matched to Accounts. And second, which fields you would like to have mapped from the Account down to the matched Lead level.

In implementing Matching/Tagging, it helps to test with a full dataset, so it's recommended testing either in a Full Sandbox, or in your Production environment. Luckily, Matching/Tagging only modifies LeanData managed package fields or custom Lead fields that you've created for Tagging, so it's easy to run tests in any environment until you receive a satisfactory result.

Resources

Please review the following resources to help with your LeanData Matching/Tagging deployment:

Basic Setup Docs:
1. LeanData University - Review the course [02-LeanData Tagging](#).
2. [Matching - Tagging Overview & Guide](#) document.
3. [Matching - Mapped Account Fields Guide](#) document.
4. [Matching - One-Time Tagging Guide](#) document.

Advanced Setup Docs:
5. [Matching Advanced Features](#) document.

Action Items - LeanData Matching/Tagging

- ✓ Decide whether all accounts are relevant for matching, or if any subset needs to be excluded/included.
- ✓ Decide how to prioritize in the case where more than one matched account is identified and whether LeanData's standard Tie-Breaking rules work for your org, or need to be modified.
- ✓ Decide which Account-level fields to map down to Leads that are matched to that account. Create corresponding Lead fields with compatible field types.

✓ Configure Tagging Tie-Breakers and and Mapped Account fields based on "02-LeanData Tagging" and other provided resources.
  ○ *What is the ideal environment to test Matching/Tagging? It helps to test with a full dataset, so it's recommended testing either in a Full Sandbox, or in your Production environment. Luckily, Matching/Tagging only modifies LeanData managed package fields or custom Lead fields that you've created for Tagging, so it's easy to run tests in any environment until you receive a satisfactory result.*
✓ Run a One-Time Tagging job.
✓ When One-Time Tagging has completed, analyze matching accuracy by viewing the LeanData managed package report called "Related Leads by Account". You can find this report in the Reports section in SFDC by searching for "Related Leads by Account".
✓ If matching results don't seem ideal, experiment with different Filters and Tie-Breakers. For best results, you should re-run One-Time Tagging any time you reconfigure the Filters and Tie-Breakers.
✓ Once you're satisfied with the rules you've set up and ready to deploy Continuous Matching/Tagging, reference the LeanData Admin Guide and follow the instructions under the "Restart LeanData Scheduler" to enable LeanData's ContinuousClean job.

LeanData Lead Routing Implementation

LeanData Lead Router allows you to automate your Lead processing. From setting up triggering logic to defining when a Lead should be processed, to making decisions based on values within fields on the Lead itself or related records like a Matched Account, to taking actions based on the outcomes of those decisions, Lead router is highly configurable.

Because there are so many capabilities within the Lead router, we recommend starting simple and adding on from there. Lead routing normally requires thorough testing in a Sandbox environment, since the outcome of Lead routing is often highly visible to your Salesforce users and can impact their workflow significantly. Ideally, you would run Sandbox tests with a full dataset, so a Full Sandbox is great. However, if that's not available you can also test within any Sandbox which has been recently refreshed from Production.

Resources

Please review the following resources to help with your LeanData Lead Routing deployment:

Basic Setup Docs:
1. LeanData University - Review the courses 03-LeanData Routing Fundamentals and 04-Lead Router Nodes Deep Dive.
2. Routing - Lead Routing Guide document.

Advanced Setup Docs:
3. Router Advanced Features document.

Action Items - LeanData Lead Routing

✓ Start by reviewing the Resources listed above to familiarize yourself with the Lead Router's capabilities.

✓ Map out your ideal Lead distribution process and get internal buy-in from all relevant parties.

✓ Import Lead Router Templates into your Sandbox and review these - they cover common Lead routing use-cases and can provide a good starting point for building out your Lead routing flow.
  - *Start by downloading the template, then going into the LeanData tab in Sandbox, then over to Leads, then FlowBuilder, then clicking on Import Flow.*

✓ Decide on the New Lead and Updated Lead entry points that would qualify a Lead to be routed upon creation and upon a relevant update.

✓ Once a Lead qualifies for routing, decide what logic needs to be checked on the Lead itself to determine its routing path.

✓ Determine what objects you'd like to match the Lead against, in order to determine the routing path - LeanData can match to an Account, an Opportunity or a Related Lead.

✓ In the case of a match to an Account, Opp or Related Lead, routing behavior can be determined by checking fields on the matched record, so you'll need to define the rules around this.

✓ What actions do you want to automate in your Lead routing flow? LeanData has a lot of capabilities here beyond simply assigning the Lead, so you will need to determine which best fit your business processes.

✓ Once you've built a rough version of your flow, it's time to deploy it for testing. If you haven't done so already, you should access the LeanData Admin Guide and follow the instructions under the "Restart LeanData Scheduler" to enable LeanData's ContinuousClean job. Next, navigate to Leads and then FlowBuilder, click on the flow you'd like to deploy and click on the Flag icon in order to set it Live.

✓ Thorough testing of your flow is an essential step before rolling it out to your Production environment.
  - *What is the ideal environment to test Lead Routing? It helps to test with a full dataset, so it's recommended to test in a Full Sandbox, however, if that's not available you can also test within any Sandbox which has been recently refreshed from Production.*
  - *We suggest two types of tests - first, by creating Leads to meet the various conditions that you've built into your flow, to make sure that each condition is firing as expected. Second, if you're testing in a sandbox with data, by running a One-Time Routing job to confirm that all functions as expected when a large number of Leads is run through. Ideally, you'd want to make sure that you hit each node in your flow at least once during testing.*

✓ Use the Audit Logs to check the routing path of the test Leads that you run, to ensure that the logic you've built is executing as you expect.
✓ To view higher level routing results, use the Routing Insights to optimize your flow.
✓ If you run into trouble with your Lead Routing flow, or simply want an expert to look over it before you deploy, email implementationhelp@leandatainc.com to set up a phone appointment with an Implementation Advisor.

Moving LeanData Products into Production

Once you've finalized tests in your Sandbox, it's time to move your LeanData setup into Production. We recommend performing such a move when LeanData resources will be available to help you, should the need arise - the LeanData Support team is available Monday - Friday from 5 am to 5 pm PT, excluding holidays and can be reached by submitting a ticket through the LeanData Help Center.

Resources

Please review the following resources to help with your Production deployment:

1. Managed App Install Guide document.
2. LeanData Admin Guide document.
3. How do I Import and Export Settings document.

Action Items - Deploying in Production

✓ You may have already downloaded the LeanData App in Production as well as configured API Access, Tab visibility and Permission sets. If not, please follow the directions for this outlined in the Install Guide and Admin Guide and email implementationhelp@leandatainc.com to confirm once the steps above are done. Once you do, your Implementation Advisor will be able to enable your LeanData products in your Production environment.
✓ If you've configured the LeanData View in Sandbox, mirror your Sandbox setup in Production by using the Setup Instructions provided and customizing columns as needed.
✓ Did your Matching/Tagging or Lead Routing setup in Sandbox cause you to create any new Fields, Users, etc? If so, make sure to mirror what you've created in Production.
✓ Transferring your Matching/Tagging tie-breakers and field mapping setup to Prod is easy if you use the Export/Import feature. Reference the How do I Import and Export Settings document on how to do so.
✓ Once Matching/Tagging rules and mappings are in place, run a One-Time Tagging job.

- ✓ Moving your Lead Routing Flow is also simple by following the instructions under Import Your LeanData Flow within the [Admin Guide](#).
- ✓ When your Lead routing flow has been moved over to Production, you should verify that fields, values, IDs, etc that are used in the flow corresponds correctly to Production. It's possible that some of these were different in Sandbox, and they need to be updated to Production fields, values, IDs before deploying.
- ✓ If LeanData routing is replacing another method of routing, you'll want to disable that routing prior to deploying LeanData routing so the two don't conflict.
- ✓ When you're ready to go Live with LeanData routing, you'll need to deploy your flow. To do so, single-click on the desired flow and hit the Flag icon to set it Live.
- ✓ You'll also need to ensure that LeanData's ContinuousClean job is Running, which means that Leads are continuously being evaluated to see if they meet the criteria for Matching and Routing. To turn this on, reference the [LeanData Admin Guide](#) and follow the instructions under the "Restart LeanData Scheduler". You're now live with LeanData!
- ✓ Now that you're live, you'll want to monitor that all is working as expected.
  - ○ When One-Time Tagging has completed, analyze matching accuracy by viewing the LeanData managed package report called "Related Leads by Account". You can find this report in the Reports section in SFDC by searching for "Related Leads by Account".
  - ○ Use the [Audit Logs](#) to check the routing path of the Leads going through routing, to ensure that the logic you've built is executing as you expect.
  - ○ To view higher level routing results, use the [Routing Insights](#) to optimize your flow
- ✓ If you need technical support you can [submit a request to our Support team here](#). The LeanData Support team is available Monday - Friday from 5am to 5pm PT and can answer technical questions or loop in other internal resources, as appropriate.

FAQs

- ● Who should I involve internally to implement LeanData?
  - ○ This of course depends on your organization and its policies. Typically the individuals involved in a LeanData implementation would be the SFDC Admin, Sales and/or Marketing Ops and sometimes representatives from Sales. Really, you should keep anyone looped in that has interest/approval on how Leads get matched and assigned and make sure that you have internal buy in as you implement.
- ● How long does a typical LeanData implementation take?
  - ○ A normal implementation has three phases - requirements gathering, building/testing, and deployment/monitoring. It's common for these steps to take around 3-4 weeks, however we have seen this move quicker for customers that are self-implementing the tool.
- ● Who can I reach out to if I have questions?
  - ○ There are two resources you can reach out to:

- - **Implementation Advisor team** - Reach out during the implementation period with any questions around the implementation process, tools, best practices, or to verify your setup.
  - **LeanData's Support team** - Reach out to Support after the implementation period with any questions.
- I've tried doing this implementation myself, but need some professional help - what can I do?
  - Reach out to implementationhelp@leandata.com and let us know. Depending on the scope of the project you need done, we'll be able to provide a quote for the work or recommend a certified LeanData partner that is able to work with you.

Best Practices

- Many times as part of the implementation customers want to run historic Leads through the Lead Router for re-assignment via LeanData. If you're contemplating running a large number of Leads through One-Time Routing, it's important to thoroughly test your configuration first to ensure that it's functioning as expected. Start by running smaller one-time routing batches to make sure that things are still working as expected, then move on to running larger batches once you've verified the small ones. Finally, it's a good idea to backup your data before running any one-time routing jobs.

- It's good to start with a relatively simple Lead Routing configuration and then add on functionality from there. The Implementation Advisor team would be happy to provide guidance as needed!

- We recommend having at least 2-3 people in your organization that are up to speed on LeanData, so it's a great idea to loop in others as you're going through the training and implementation as well as to keep detailed notes of your implementation decisions that someone can reference if you're not available.

- Do you feel like a LeanData wizard after completing this implementation? Take the LeanData Certification course and become a Certified expert! Check upcoming dates here.