

LeadSigma Core Lead Assignments Strategies

First to Accept

LeadSigma can call every sales representative all at once when a lead comes in. The first lead to answer the phone and accept by pressing 1 will be routed to the lead. All sales reps who call in and attempt to accept the lead will not connect with the lead and will be presented with an error message.

Doing a blast call like this will ring all sales representatives' phones at the same time. If there are a large number of sales reps receiving phone calls, calling all phones at once may be problematic and a sequential strategy may be more appropriate.



Sequential Order

LeadSigma can call sales representatives in a specific order when a lead comes in. If the first lead who is called, declines the call then the next lead will be called. This process continues until the lead is accepted.

HubSpot + LeadSigma Lead Assignments Strategies

Round Robin using Workflow Automations

Within Hubspot, leads can be assigned to reps in a round robin system using the Rotate lead action. When using the Rotate action, the sales rep is assigned to the lead. The sales rep who is assigned to the lead will come through to LeadSigma when using the Call Slingshot custom action within the Workflow Automation.

Custom Territory Based

The round robin action can be enhanced with a territory assignment workflow automation to set a territory custom property based on the lead's location. The Call Slingshot custom action will accept the sales representative and assign the slingshot to that sales representative.

Interested in hearing more about supercharging your sales process with LeadSigma and Hubspot?

Call (913) 257-3742