



DemandBlue partners with a Leading Mortgage and Refinancing company to implement a scalable, enterprise-wide customer engagement solution using Salesforce

The client offers mortgage lending solutions in the United States. They offer mortgages and home buying programs such as refinancing options.

## Challenge

- The client's Inbound leads from target accounts were not consistently being identified and assigned to an account owner, resulting in a major gap in the lead-to-sale process
- The existing lead assignment strategy was not balanced across sales teams
- Leads that were related to partner or customer accounts were clogging up the sales queue
- Many existing leads were assigned to inactive owners and were not being followed up

## Solution

- DemandBlue worked with the client to develop a custom account-based lead assignment model using Salesforce. This was executed by creating a custom formula that compares the domain in a lead's email address to all website domains listed in existing accounts to identify a match
- Leads are now automatically detected from target accounts and assigned to the appropriate Account Executive, so high-quality leads are followed up in a timely manner
- Implemented a blended lead scoring and grading model, the leads assigned to sales are higher quality
- Implemented new process, marketing now properly identifies and assigns qualified leads that the sales team has a higher probability of closing

### Lead Assignment Business Rules

First, we used Salesforce Flows to find if the lead's email matches an existing account's domain. If the lead is matched to an existing account, the Flows assign the lead to the Account Executive who currently owns that account and alerts him/her via a "new strategic lead notification."

## Benefits

- **Sales Managers and Account Executives have more time to close deals:** By removing the burden of manually reassigning leads across the team, there is more time for higher-value tasks.
- **Leads don't slip through the cracks:** Leads are now automatically detected from target accounts and assigned to the appropriate Account Executive so high-quality leads are followed up in a timely manner.
- **Close more deals:** By implementing this new process, marketing now properly identifies and assigns qualified leads that the sales team has a higher probability of closing.