zendesk

INDUSTRY
Customer Service, Software, B2B

HEADQUARTERS
San Francisco, CA

CHALLENGES
Lead distribution workflow was done manually and a challenge to execute with limited resources.

Manual processes left room for error—leads were not always sent to the right sales reps at the right time, causing the sales team to create a Slack channel to find the right owner.

The organization lacked visibility into the performance of its lead management operations.

Sales team was unclear on which leads should be their priority.

SOLUTIONS
LeanData Matching uses industry leading fuzzy matching algorithm to automatically match leads to existing accounts.

LeanData Routing enables custom routing rules, enabling the speedy delivery of leads to the right reps at the right time, increasing efficiency and accelerating response time.

RESULTS
Decreased manual lead assignment by 45% and saved approximately 55 hours of work per week.

Time to route leads decreased 82%—from 45 minutes to about eight minutes.

Lead touches decreased 90% on average—from four to eight hours to 30 minutes.

Zendesk Reduces Lead Routing Time by 82% with LeanData

Zendesk has grown tremendously since the software company was founded in 2007. It now has four major sales regions around the globe, and in the past two-and-a-half years, its staff has doubled in size.

Zendesk prides itself on a commitment to serve businesses of all sizes with a speedy and personalized approach. To stay the course through the company's rapid expansion, Zendesk needed a SaaS solution that could provide greater visibility into business processes as well as applying automation, allowing its team to focus on delivering excellent service that resulted in driving revenue.

Moving beyond cumbersome software and manual workflows

Zendesk's large, diverse customer base generates high lead volume, but with limited resources, it was a challenge to process, qualify, contact and track leads. This was especially complex because Zendesk supports a range of customers from small and medium sized businesses to large enterprises.

As Zendesk expanded, each new sales group had different needs for assigning leads. The company was relying on their sales tool's out-of-the-box routing, but was outgrowing capabilities. For example, the round robin functionality Zendesk used in the U.S. didn't work for many leads in Africa because they needed to route to French speaking reps. The various routing methods the company had built out were becoming unwieldy, causing leads to be assigned to the wrong reps. The sales team was spending time qualifying leads and even had a Slack channel set up to find the rightful owner of incorrectly routed leads.

Zendesk needed a technology solution that could support its global teams and help tackle the challenges that come with rapid multinational expansion, such as providing service in various languages and in remote regions. The company needed this solution to be able to automate lead processing and free up its sales team's time to focus on business development.

> "Our leaders want high-level insights into business processes, and that's what LeanData was able to provide—beyond its capabilities as a tool. LeanData helped us expose the story behind the numbers."

- JM Caballero, Senior Manager of Marketing Operations

Automating and scaling business

As Zendesk's growth accelerated, the company built out a marketing operations division to support its marketing and sales teams with the goal of improving customer experience and time-to-revenue. Cabrero and Caballero and the marketing ops team knew what they wanted to accomplish and after evaluating several technology products, decided LeanData was the best choice. The team implemented LeanData in six weeks and hit the ground running.

"We went from a wild west scenario with people doing their best with the limited resources they had, to the structure we've created now, where instead of trying to fight fires, we're looking at efficiencies," said JM Caballero, Senior Manager of Marketing Operations.

For example, through Zendesk's "speed to lead" project, the company wanted to decrease the time it took to route leads so sales reps could serve the buyer faster. LeanData helped reduce routing time by 82%, from 45 minutes down to eight minutes. Zendesk is now able to ensure leads are categorized correctly, and create and easily modify complex routing rules. With LeanData's reporting tools, the company knows when to prompt sales reps to follow up with leads, and can automatically re-assign leads owned by inactive or non-responsive reps. As a result, lead response time decreased 90% on average — from between four and eight hours to 30 minutes.

Zendesk has also maximized its resources with LeanData. Brian Cabreros, Director of Marketing Operations says, "As our company has grown, LeanData has helped us with efficiency and faster response times, so we've been able to scale our business without requiring additional headcount."

With LeanData Zendesk decreased manual lead assignment by 45% and saved approximately 55 hours of work per week, automatically routing an average of 4,100 leads weekly. Caballero says LeanData has improved routing quality, and estimates Zendesk decreased time spent manually reviewing leads by 75%. Sales reps no longer spend up to 10 minutes per lead on research to qualify them or find their rightful owner—instead, they focus on selling. And that Slack channel has been deleted.

Gaining visibility into operations and reaching new customers

With LeanData, Zendesk now has greater insight into operations with reports and analytics that show how long it takes for a lead to get into the company's database, push through to their sales tool, and become enriched.

"Our leaders want to understand the highlights, and that's what LeanData was able to provide—beyond its capabilities. LeanData helped us expose the story behind the numbers and provides a lot of insights to help answer our executives' questions," Caballero said.

Zendesk has also expanded its customer base with LeanData. Before, limitations to routing rules made it difficult to support unique needs in different regions and market segments, but Zendesk can now create complex routing assignments to over 42,000 postal codes. LeanData even helps to identify leads from regions the company isn't currently covering. Cabreros says the team is evaluating how they can support these potential new markets.

A solid partnership

With LeanData, Zendesk's marketing operations team can complete routing changes anytime. Zendesk's team have become power users. They are vocal with LeanData's product team when they come across features or functionality that could help them improve their time to revenue. Over the past two years they've seen many of their requests added to the roadmap, and look forward to continuing to help shape the future of LeanData's product.

"It's been a really good partnership. LeanData is delivering on the things Zendesk is trying to solve," Cabreros said. "A lot of the processes we're able to automate today had to be done manually before," Caballero added.

Evolving in a complex business climate

As LeanData adds integrations with other tools such as Outreach and ZoomInfo, Zendesk is automating operations further. "We can automate things within the flows and existing tools that we need them to occur," Caballero said.

Looking forward, Zendesk plans to build on the momentum it has gained with LeanData, as it's business becomes even more complex. The company expects to evolve from inbound only to an account based model and plans to use LeanData's auto-convert functionality to move contacts to account executives, while also maintaining lead flow for regular sales reps.

As Zendesk grows, the company remains committed to its startup roots. "Now we're running with the big guys, but we're trying to be there for everyone," Cabreros says. "We're also doing this globally, and startups in South Africa are a totally different beast than startups in U.S. cities." Automation and insight into operations will remain crucial to Zendesk's time-to-revenue, and LeanData will continue to be a valuable partner.

About Zendesk

Zendesk's customer service and engagement products and platform power better experiences for administrators, agents, and customers. Zendesk serves 150,000 clients in 160 countries and territories worldwide, and its flexible solution scales to meet the needs of any business.