



# The Ultimate Guide on Lead Distribution

Part 4 of 6

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## Introduction

# Lead Distribution Impact

Let's say you have new leads coming in through your sales pipeline, where do they go? Many small businesses don't have a dedicated strategy to distribute leads. Without a process, they could fall through the cracks. That means you're spending money to receive each lead, while some of them may not even go to a sales representative.

That's why you need an effective lead distribution process to run a successful sales team. But what exactly is lead distribution and does it cost a lot of money to use?



## How Lead Distribution Works

Lead distribution is the process of assigning leads to an individual or teams. These individuals or teams are typically in sales, marketing, or service. There are many lead distribution models that are manual or automated. Lead distribution should be simple, transparent, and every team member should understand it easily.



Lead distribution typically takes place after a lead has been nurtured enough through a marketing funnel. They are then passed onto a sales team or sales representatives under a specific pattern. For example, you generate a lead, they pass onto marketing, they qualify the lead enough, and then they are distributed evenly amongst three sales representatives.



Lead distribution is essential to better functionality. However, it's easy to create a manual process, where everyone's on the same page. So why do many successful businesses use thousands in an automated lead distribution system?



# Why is automated lead distribution vital to the success of business?

Lead distribution acts as the process of assignment. In every business, managers need to assign duties and responsibilities to a person. However, with an automatic lead distribution system, you are assigning a set of tasks related to the lead. So, you're completing a vital stage by: (1) letting people know what they are supposed to do and (2) how they are supposed to do it.

This is the first step of the sale process to generate revenue. Without a distribution process, many B2B and B2C companies fail. Mostly because employees do not know what they are doing or how they are supposed to do it.



However, with an automated lead distribution process, you cut out the middleman. You can make tools assign leads based on specific parameters and you no longer need a manager. That's why companies are investing millions into lead distribution systems. It not only improves timeliness, but it also costs less over time.

HOW MUCH LESS DO INBOUND  
LEADS COST VERSUS OUTBOUND  
LEADS?

**61% less**

WHAT PERCENT OF MARKETERS SAY  
INBOUND MARKETING STRATEGIES ARE  
THEIR PRIMARY SOURCE OF LEADS?

**50%**

HOW MUCH MORE DOES INBOUND  
MARKETING GENERATE VERSUS  
OUTBOUND?

**3X more leads per dollar**

WHAT PERCENT OF MARKETERS SAY  
INBOUND MARKETING IS THE PRIMARY  
MARKETING APPROACH?

**74%**

## The Know

# Implementing lead distribution

Lead distribution can either be implemented by automation or through manual efforts. If you want to use manual distribution as your methodology, you should use some kind of a tracking sheet. That means using excel, google docs, or another database that can track real-time information.

Otherwise, when using automation distribution there's several systems that can put yourself ahead. For example, DYL uses automatic distribution technology that can be setup to distribute based on unique lead attributes.

On the next page, you'll find methods that you can use for both manual and automatic lead distribution. These are ways in which you can cut costs and make your teams work seamlessly.





# Different lead distribution methods:



1

## Round-robin lead assignment

This type of distribution happens when you assign a new lead for the next sales representative in line. You can either use software or do it manually. We recommend tracking when the lead came in, when it was assigned, and what fields were required for it to be assigned to sales. Automatic round-robin can also make a use case for when representatives are out of the office or on vacation.

2

## Group-based lead distribution

This is a method that typically happens when you have a larger sales team. If you have 20+ sales representatives, you should use something similar to this methodology. This method assigns leads to a large sales group that are then divided into more specific groups. These groups can be by location, product, service, or more.

Once you have broken your team into different groups, you can use a manual or automatic qualification process to assign the right leads to the correct specialized group.

Then, that group can assign leads to individuals through a round-robin system or something similar.



3

## Specific criteria and rule distribution

This distribution type happens when you set up a distribution for a specific field or type of lead. For example, you can assign a cold lead that fills out a form, including “Wants a demonstration” to a sales representative instead of the marketing team.

Or if a lead comes in based on their location, say “New York”, you would assign that lead to the sales representative that handles all New York leads. Leads are routed by location, size, or other characteristics as part of their demographic.

## The What

# Secrets to improve your lead distribution process

A few key ingredients can make your life much easier throughout the lead distribution process. Here are a few things to consider when building out your methodology:

## 1 Start with simple rules

The reason why this is so important is because if you make things too complicated right away, your methodology will be difficult to follow. Start simple, add a few rules, and pay attention to your process. Is it working? Can you improve it? How and why does it need improvement? This will make it easier for your team to understand and to get a full-picture of your sales process.

## 2 Document your lead distribution process.

Why? Documentation gives you a real-world example of what's working and what's not. It gives you data on how your sales staff handle incoming leads, who works better with certain leads, and how you can increase conversion rates. Document each step of your lead distribution process so you can improve alongside your team and continually look for new opportunities.



### 3

## Work on a transparent process

Transparency is key to sales success. The reason why is because salespeople care a lot about whether or not they're getting quality leads because it directly affects their pay. The more transparent your sales process, the better people feel about your organization. It not only improves staff efficiency, but it can help retain employees for a longer period of time. According to PSR, one of the leading reasons why sales people leave organizations is because of too much complexity in the sales process.



### 4

## Award high performance

If you have a sales representative that is performing much better than the rest of their counterparts, reward them. That means, use a weighted distribution to award more leads to sales people who have better conversion rates. You'll see a higher conversion rate amongst your sales leads and improve revenue.

## 5 Understand why your high performers are performing better

One of the best ways to improve your lead distribution process is by tracking and monitoring the lead distribution process. If one of your sales people are converting much better than others, it's time to understand why they perform better and take a deep dive at their personal process. This involves collecting information and performing data analysis to understand their high performance.



Then you can try to apply this to your other sales people. Is it because you're giving them better leads? Or leads with a specific criteria? Or is it just because they're better at selling your product? Answering all these questions will give you a realistic understanding of why they have high performance.

## 6 Only automate if you need it

If you already have a process that works and is growing your company, don't break it. However, if you're spending a lot on this process and you realize it can be automated, then work automation into your process in some kind of way. That means you don't have to automate everything, but you can use distribution to send leads to salespeople. Whatever you do, automation only makes sense if you (1) save time, (2) cut costs, and (3) generate enough revenue to compensate for the cost.

# Lead distribution sample plan



A lead distribution plan will help you understand what things you need to make your lead management process cost effective and run by itself. Below is a lead distribution template you can use to automate and grow your business:



# 1 Generate a lead through form automation



The first step of the lead distribution process is by automating a way to generate leads and bring them into your business. If you haven't seen our lead generation eBook, [click here](#). Automating your lead generation process is vital to grow your business, while bringing down costs as low as possible.

The best way for companies to generate quality leads is by creating a lead magnet, for example an infographic. Once the lead clicks on the lead magnet, your website would request them to fill out a form that includes important information about their background. For example, a B2B business will typically ask for a first name, email, and phone number. You can include other fields that are instrumental to convert more leads into paying customers.

After you generate the lead, your form should automatically populate the information to your customer relationship management tool. At this point, you should have a quality lead and the information is in your database, where your sales or marketing representative can reach out to them.

## 2

## Create an smooth qualification and nurturing process

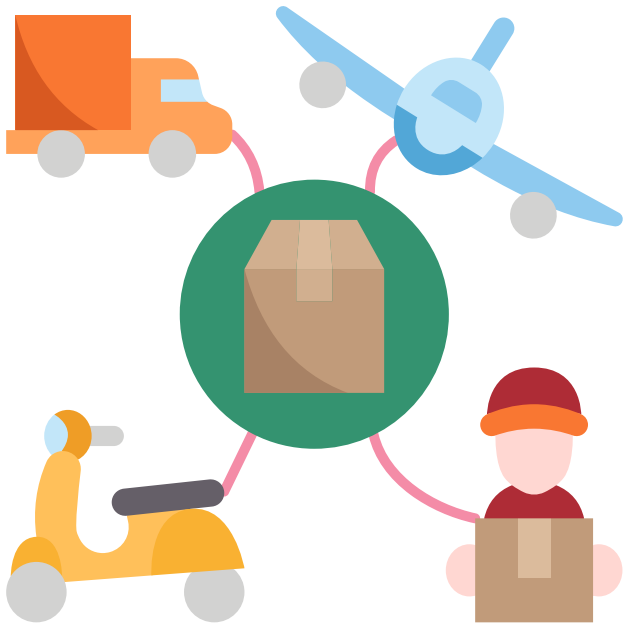
Once you have enough information on your lead, you can begin your qualification or nurturing process. If you haven't seen our qualification eBook, [click here](#). At this step, the typical qualification process begins with marketing.



This means you're sending them content and based on their interactions with the content they can move forward in your marketing process. You can send them eBooks, infographics, webinars, quizzes, articles, and other engaging content.

A typical qualification process will include sending the lead a few pieces of marketing content, and if they've clicked on links and/or opened the email several times then they're passed onto the sales team.

### 3 Choose a lead distribution method



Once your lead has engaged with company content enough, they're passed onto the sales team.

But, do you have a process to distribute your leads effectively? Lead distribution takes place in two ways: (1) strategy and (2) action. What does this mean?

The strategy part, being how you actually distribute the leads across your team.

While action refers to the distribution method. This can be both manual and automatic.

For example, a typical B2B company will distribute leads in a round-robin format, so you assign a lead for the next sales representative in line. It evenly distributes the leads amongst your sales team.

Throughout this process, they typically use a sales management tool that'll automatically assign a new lead and won't require the need for someone to watch over the process the entire time.



## **4** Connect your lead distribution method to your communication tool

After you've distributed the lead, your sales representatives need to know when they're assigned. A great way to let your sales team know about incoming leads is by connecting your lead management system to your communication system. For example, slack and microsoft teams have integrations with many lead management systems.

## **5** Assign based on lead fields

The last step to think about is how you should assign leads based on certain criteria.

For example, when your leads are in the process of being handed over to sales, how do you assign? Many businesses assign to the next representative in line. However, what if you serve two different audiences?

For example, some leads come in through New York while others come in through Los Angeles. If you have a representative that converts a higher number of New York-based leads, then you should assign to that sales rep based on geographical location.

As you create a lead distribution plan and put it in action, you'll find that testing and monitoring your process will help you find ways you can improve your process.

## Next Step

# Testing and Monitoring



Throughout your lead distribution plan, we learned about ways to bring in leads, qualify them, pass them onto sales, and distribute them effectively. But how do we improve that process?

A great way to increase your sales acquisitions is through testing and monitoring. During this phase, you'll constantly setup different distribution methods to understand which of your sales reps convert more leads and if demographics play a part in the conversion. For example, if a sales rep has an easier time converting leads that have children, that would be part of your testing and monitoring phase.

Testing and monitoring is very similar to marketing a/b testing. You test a specific lead distribution process and modify it to create a second version of the same distribution process with slight changes. It's the process of comparing two versions of a lead distribution plan to figure out the better performing variation.

## How it works:

During your testing and monitoring process, you'll set up a control. This will include your typical lead distribution process. For example, let's say you start with manual round robin distribution. That would be your control. The next step would be to create a variation.

This means using a round robin distribution using automation. So some leads would go through a manager, while others would go through an automated software. You can then figure out which serves you better based on time spent in the funnel, conversion rates and more.

In a typical testing and monitoring process, many B2B businesses change their lead assignment rules. This means they're changing which leads (from a given demographic) are assigned to a representative based on their conversions.

So now that you know how the testing and monitoring process works, what key metrics should you look out for in your lead distribution process?

## Final Step

# Key Metrics

Many key metrics will impact your lead distribution effectiveness. This directly impacts your likelihood of converting a lead to a paying customer. Below are a few key metrics that should be a part of your testing and monitoring process:

- A** Percent leads converted from each demographic
- B** Percent leads converted from each sales representative
- C** Sales Funnel Length (Cycle Time)
- D** Demographics that impact lead conversion
- E** Average deal size
- F** Acquisition costs
- G** Conversion rate
- H** Total sales
- I** Customer lifetime value
- J** Email opens



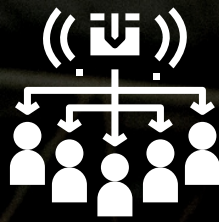
The above list is a good place to start thinking about your lead distribution process. This will tell you if leads resonate with a certain sales representative and if demographics play a role in distribution.



Lead distribution is the process of assigning leads to teams or individuals. Throughout your process, you should implement different plans to get a better understanding of how your team works and if there's ways to improve it. A typical lead distribution plan will include a lead capture form, a lead qualification process, how you will distribute incoming leads, a way to alert sales reps of assigned leads, and changing your distribution based on lead demographics.

Through the use of a testing and monitoring phase, you can track key metrics to learn more about how you can improve your process. You should always start with a controlled plan and create variations to boost total sales and overall conversions.

A lead distribution plan will not only help you improve revenue, but will help your marketing and sales teams run smoother.



PART 4 OF 6:  
LEAD MANAGEMENT EBOOKS

# LEAD DISTRIBUTION

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