LeanData & Slack Integration

Accelerate response times with instant and automatic notifications

Challenge

Go-to-market teams often don't know they have been assigned a new lead, contact, account, opportunity or case until it is too late. This can negatively impact not only time-to-first touch, conversion rates, and SLA agreements, but also revenue and the customer experience.
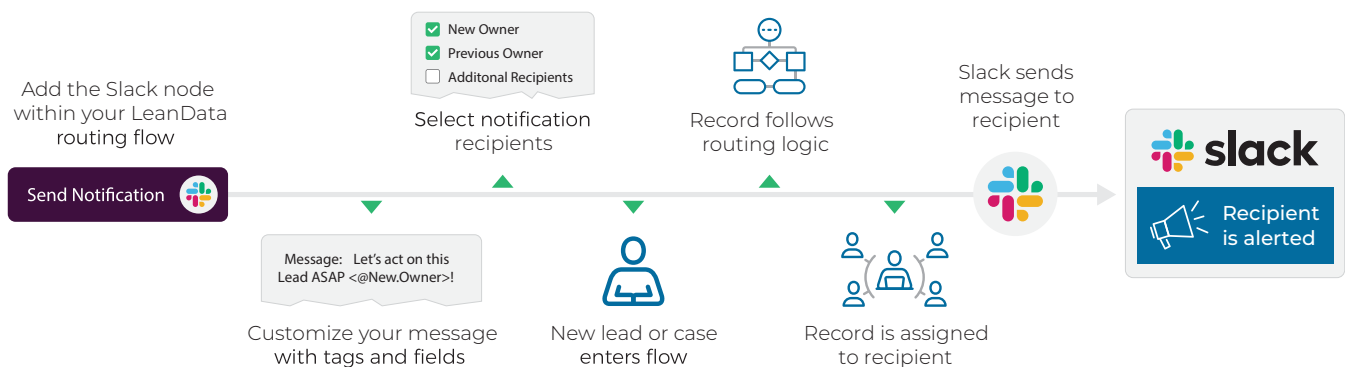
Solution

LeanData's integration with Slack provides the ability to automate push notifications that rapidly alert team members any time a record is assigned to them. By providing teams with immediate alerts via Slack, they can respond faster. This results in faster time-to-revenue, stronger cross-functional relationships, and an improved customer experience. See how NotifyPlus takes this even further the next page.

Key Benefits

- Increase response times & conversion rates
- Achieve SLA targets
- Build stronger cross-functional relationships
- Grow revenue faster
- Improve the customer experience

How It Works

FlowBuilder, LeanData's visual routing tool, makes it easy to specify who and when someone should be notified via Slack as well as what message should be delivered at any point during the routing process.

Add the Slack node within your LeanData routing flow
Send Notification

Message: Let's act on this Lead ASAP <@New.Owner>!
Customize your message with tags and fields

☑ New Owner
☑ Previous Owner
☐ Additonal Recipients
Select notification recipients

New lead or case enters flow

Record follows routing logic

Record is assigned to recipient

Slack sends message to recipient

slack
Recipient is alerted

B BrightTALK

"Having one place to see all of our inbound lead requests and all of our hand raises, each in a separate Slack channel en masse, has been very exciting."

Tanya Dracolakis, Senior Marketing & Sales Operations Manager

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Get Started Today

To learn more about how to optimize response times using instant notifications, visit us at **leandata.com/contact-us**

NotifyPlus

LeanData NotifyPlus takes the Slack integration further, unlocking more productivity across your entire revenue team. NotifyPlus enables action buttons to be added to any Slack notification so that Salesforce records can be created or updated from directly within Slack.

This eliminates time-consuming context-switching for your sales reps, improves process adherence for operations teams, and accelerates pipeline by alerting deal rooms to immediate action they need to take.

- Update any routed or matched record
- Customize prescribed action buttons
- Leverage context from any record referenced in your process
- Provide suggested values to help reps complete updates faster
- Automatically track SLAs with an expiration for each alert

Routing with NotifyPlus Example

Add the Slack node within your LeanData routing flow

Create or Manage Channels

Send Notification

Message: Let's act on this Lead ASAP <@New.Owner>!

Customize your message with tags, fields, and buttons

☑ New Owner
☑ Previous Owner
☐ Additonal Recipients

Select notification recipients

New record enters flow

Record follows routing logic

Record is assigned to recipient

Slack instantly sends interactive message to recipients

slack

Recipient is alerted

Recipient provides input

Send

Record is created or updated in Salesforce

salesforce

About Slack

Slack has transformed business communication. It's the leading channel-based messaging platform, used by millions to align their teams, unify their systems, and drive their businesses forward. Only Slack offers a secure, enterprise-grade environment that can scale with the largest companies in the world. It is a new layer of the business technology stack where people can work together more effectively, connect all their other software tools and services, and find the information they need to do their best work. Slack is where work happens.

Why LeanData?

Built upon the best-in-class matching technology, LeanData is the most simple, accurate, and actionable engagement analytics tool in the market.

LeanData provides the market's first Revenue Operations platform for accelerating revenue and growth in B2B. Standing at the center of Salesforce CRM, LeanData's family of solutions orchestrate and automate the go-to-market process to help revenue teams close more deals and drive more revenue, faster. Visit **leandata.com** to learn more about LeanData's revenue operations solutions for Lead-to-Account Matching, Routing, Engagement and Marketing Attribution. Or visit us on AppExchange.