How InsightSquared Seamlessly Converts Leads

When a lead is generated by sales analytics provider InsightSquared, it is automatically converted into a contact within the proper account by LeanData Sales Accelerator.

Demand Generation and Account-Based Marketing Manager Gabe Paley describes InsightSquared as "Moneyball for small business" – a reference to the best-selling book and movie about how baseball's small-market Oakland A's used data analysis to outfox big-spending teams. So it's no surprise that the InsightSquared team put considerable thought into designing the most efficient lead-assignment process possible. Their conclusion: Don't deal with leads at all.

"I just didn't see leads as a very flexible object for us," Paley added. "As account-based has grown more prevalent as a strategy, not focusing on leads just made more sense to me. LeanData makes all of that easier by converting everyone as a contact. Why go through all the hassle of converting leads manually into contacts when LeanData does all of that work for us?"

LeanData Converter enables InsightSquared this way:
All leads coming into the system automatically are matched against accounts.

Leads that do match with existing accounts are converted into contacts. This gives InsightSquared instant visibility into all of the activity within that account, providing the sales and marketing teams with complete context.

For those remaining leads, LeanData customized Sales Accelerator so that it allows InsightSquared to do something unique. Leads not matching into accounts auto-create new accounts. Business Development Representatives then can immediately follow up and determine which of those new accounts are "junk." That gives InsightSquared an understanding about how to fine-tune marketing efforts so campaigns remain focused on high-value target accounts.

"The more we can automate the entire process as a marketing team, the better we are," Paley said. "InsightSquared is all about showing how you can use your data to make good decisions. This is an example of how we apply that philosophy ourselves. LeanData helps us by doing things with its products that I just haven't seen other companies do."

To learn more about how LeanData customers have tailored Sales Accelerator to their business needs, download our eBook "A Lead's Journey to the Right Home."