NEW BREED +

THE POCKET GUIDE TO

HubSpot Lead Routing

Studies show that sales teams spend just 36% of their time on selling. So what's occupying these reps and leaders for the rest of the day? Tasks that pull sellers away from deal progression — like updating CRM records, tracking multi-channel outreach and sales operations troubleshooting — add up to a major productivity and revenue drain, especially as sales teams grow.

In their efforts to boost operational efficiency and focus more energy on high-value sales activities, sales and operations leaders can leverage **strategic lead routing best practices** to turn this often-legacy business process into a revenue driver.

In this guide, we'll walk through how sales and operations leaders can distribute leads to their sales teams in a way that is both intuitive and closely aligned with business goals.

What is Lead Routing?

At some point as potential customers engage with your brand and move through your funnel to become leads, they will need to be assigned a contact ‘owner’. This owner (usually a sales rep) may only be responsible for further qualification, or might own the lead all the way through various deal stages and into their customer relationship.

The process for assigning this lead is known as lead routing.

Startups and small businesses with smaller sales teams may fully rely on manual lead routing or leverage one-off automation tools that require frequent manual intervention.

Scaling enterprises typically have access to a more robust revenue tech stack, but may struggle to automate and consolidate lead distribution processes at scale.

Common Lead
Routing Methods

Pull-Based

Basic/Round Robin

Criteria-Based

LEAD ROUTING OPTIONS

Pull-Based
Lead Routing

Fully-manual distribution. The sales or sales ops manager manually assigns leads using a combination of notes, CRM details, spreadsheets, calendars, and their own institutional and team knowledge.

Downside

The process is labor-intensive for sales and operations leaders, and unsustainable as teams grow past a handful of dedicated reps.

“Cherry picking” of available leads, unbalanced distribution among the team, and missed opportunities due to human error are all common risks.

Round Robin/Workflow-Based
Lead Routing

Automated distribution that rotates evenly through reps. This can be as simple as assigning a lead to the next available advisor in an alphabetized list. More sophisticated workflow-based approaches may involve pulling CRM data.

Downside

Reps vary in focus areas, strengths and time zones that are not accounted for with basic automation. Configuring complex workflows is a time-consuming manual process, where small errors may result in mis-routing or losing high-value opportunities.

Criteria-Based
Lead Routing

Relies on lead routing rules (based on geography, industry, deal size, or other criteria) to automatically distribute leads to the right rep. While some CRMs have basic lead routing tools, the most scalable approach is a system or app “on top of” the CRM to make this approach easier to manage.

Downside

Criteria-based routing is the best option for customer experience and overall scalability. But without a distribution strategy and supporting customization options, criteria-based routing takes time to implement and is a significant burden to manage.

THE BENEFITS OF AUTOMATED LEAD ROUTING

Depending on a company's size, organizational maturity and tech stack, lead routing typically involves a degree of automation. In fact, a high degree of lead routing automation is all but necessary for an effective, scalable sales process.

Through automation, lead routing can free up operational resources, ensure no leads are lost, and enable the sales organization to scale. Here's why automated lead routing is the best method for high-growth organizations:

Efficiency

Pulling from a lead queue or manually entering new opportunities are error-prone processes that many reps dread. With automated lead routing, sales leaders can fine-tune how leads are routed to their teams and remain hands-off in the distribution process while saving time on sales operations.

Quality

An important prospect being routed to the wrong rep could prove problematic. The rep's inexperience could cause you to lose valuable business. By automating the lead distribution process, the right reps can provide the best buying experience and win those deals.

Scale

A custom lead distribution approach readies your business for scale. Unlike a traditional round-robin style, it routes leads to the right reps with minimal upkeep. Well-built systems will accounts for fluctuations and are adaptive to a growing team and expanding pool of leads.

Ultimately, lead routing is only as effective as the tech stack that's tracking deal-related data across communication channels. For automated lead routing to deliver these benefits, it must tie into the processes and platforms you use for everyday sales operations and deal management. Next, we'll examine how HubSpot supports lead routing — and where you may need to lean on plug-in tools to fully optimize the distribution process.

Lead Routing:
How HubSpot Helps

HubSpot enables foundational lead routing automation with features like automatic lead rotation, flexible workflows, and customizable scoring.

Sales and operations leaders using HubSpot create rules (or logic) directly in the CRM. Sales Hub contains a number of basic features to enable the lead routing process:

Lead Scoring:
Rank leads based on contact properties and digital behavior

Lead Rotation:
Streamline round-robin methodology for a fair lead distribution

Timeline View:
Get a chronological view of contact engagement and touchpoints

App Integrations:
Enhance lead distribution functions with a wide range of apps

Significantly more scalable than manual distribution, HubSpot's native lead routing method is a good option and comes included with many HubSpot subscriptions. However, for rapidly growing or large-scale companies, HubSpot lead distribution workflows — **which require both time and technical expertise to set up and update** — can be highly resource-intensive to manage.

Luckily, you can get more from HubSpot's powerful arsenal of capabilities — and revolutionize its lead routing limitations — with purpose-built applications.

Take Lead Routing to the Next Level.

HubSpot's core lead routing capabilities are central to many growing revenue teams. But as customer expectations rise and quotas remain high, you'll need to maximize your resources and capitalize on the newest tools available to support scalable lead routing.

Purpose-built by New Breed, Distributely now offers custom lead routing without the complexity.

Distributely is the only turnkey app developed specifically to help sales and operations leaders eliminate wasted hours on lead routing. It creates more value out of the HubSpot CRM through a seamlessly integrated application that delivers the right lead, to the right rep, at the right time, every time.

DISTRIBUTELY
A New Breed Application

Custom. Not Complicated.

Buying programmatic actions and maintaining large workflows in HubSpot only adds to your daily complexity. With Distributely, sales leaders can build and customize rules in minutes, right in the app.

Capacity-Based Routing

Distributely's capacity-based weighting instantly factors in open pipeline and tilts more leads toward reps with capacity. Plus, the app enables setting a maximum 'cap' of leads each rep or team can be assigned.

Your Revenue, Protected.

By creating teams on your terms and assigning leads based on rep performance, specialization, segment and more, you can deliver a consistent experience that drives lifetime loyalty and yields repeat customers.

Easy Availability Changes

Set reps' out-of-office time and hour-by-hour availability right in the app, with no disruption to other automation — a simple but groundbreaking feature for today's hybrid, distributed teams across time zones.

DISTRIBUTELY

A New Breed Application

With an application like Distributely layered on top of HubSpot, sales and operations leaders see dramatic gains in tech-enabled efficiency and experience a turnkey way to save time and sell more.

Distributely is free forever up to five users, and offers competitive pricing that scales with you. Create an account to see this groundbreaking app in action. Or, to see an expert-led demo and learn how Distributely fits into your revenue tech stack, connect with New Breed today.

CREATE A FREE ACCOUNT

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