LeanData

LeanData Revenue Orchestration

Pricing and Packaging

Standard	Advanced	Premium
Lead Object	**Lead, Contact & Account Objects**	**Any Salesforce Object**
Replace brittle assignment rules, custom code and manual processes.	Rewire account-based processes in moments, not months with a connected RevTech stack.	Overcome selling complexity by automating unique plays across lines of business, geographies and teams.
$39 USD per user / monthly	$49 USD per user / monthly	$59 USD per user / monthly
	Best Value!	

The LeanData Revenue Orchestration platform has been conveniently packaged to address the most common orchestration needs of B2B organizations. A LeanData expert can help you determine which package is best, based on your current priorities or challenges, but this guide is meant to assist you in making this decision.

Services are sold separately so that your implementation can meet your specific needs and deliver a return on your investment even sooner. ***Custom pricing is available*** for enterprises with complex business needs or highly customized Salesforce environments and should be discussed with a LeanData representative.

Which package is right for you?

Continue reading to learn more and determine which package best fits your organization's needs. Your selected package would apply to all users covered in your subscription agreement. A "User" is any Salesforce user or queue that has been explicitly assigned (owner or custom user field change) a standard or custom Salesforce object by the Subscription Services.

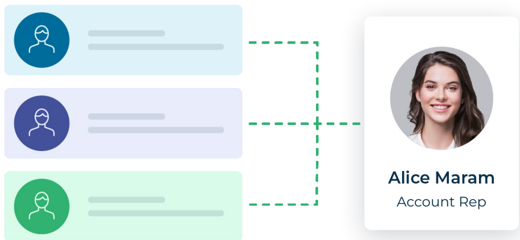
About the **Standard** package

Replace brittle assignment rules, custom code, and manual processes.

$39 USD

per user license / monthly

What's included?



Matching

Match Leads to Accounts for Routing.

View any identified matches on all Lead, Contact, and Account records.

Routing

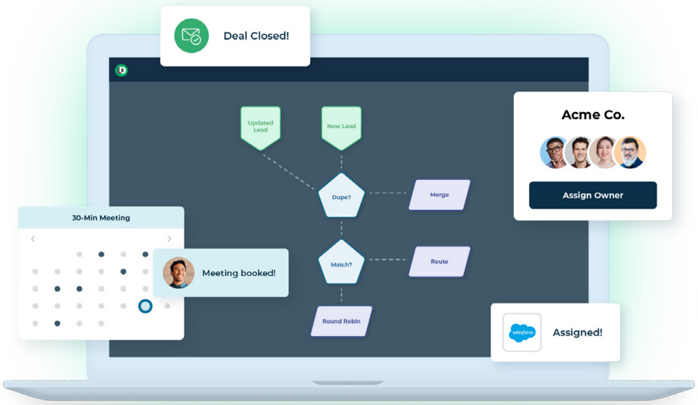
FlowBuilder for Lead routing.

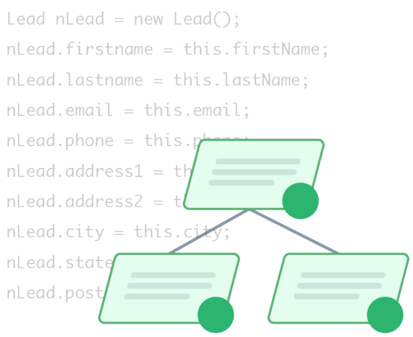
Real-time, small batch, or one-time batch processing.

Route leads by Round Robin, Territory, Account match, and other custom criteria.

Notify users via email, Chatter, or integrations.

Identify duplicate leads during routing for merging, improving assignment accuracy, or providing additional context to users.





Reporting

Routing insights and audit logs to understand how and why records are matched or routed, or when new automated processes were deployed.

Available Integrations

Notify and provide users with relevant context via Microsoft Teams and Slack.

Is the **Standard** package the right fit?

This package might be the right fit if you...

- Only need to assign the Lead object in salesforce
- Have a go-to-market strategy that focuses on lead generation
- Need correct information about each lead's account to guide lead assignment
- Do not anticipate adopting a new go-to-market strategy within the next 12 months
- Have a sales organization with less than 30 people
- Do not track speed-to-response
- **Currently have the following challenges:**
  - Find Leads often assigned to the wrong rep
  - Spend too much time manually assigning leads
  - See duplicate leads often being created in Salesforce
  - See incorrect account information being placed on lead records

Common Use Cases

Improve Lead Assignment Accuracy

Replace Custom Code and Manual Process

Improve the Inbound Buyer Experience

Need More?

Consider upgrading to **Advanced** instead if you...

- Need to assign records other than Salesforce Leads
- Need to auto-convert Leads
- Have a go-to-market strategy focused on specific accounts
- Have a sales organization with 30 people or more
- Need to orchestrate for teams other than the sales organization
- Anticipate adopting a new go-to-market strategy within the next 12 months
- Anticipate lead volume doubling within the next 12 months
- Need to track how quickly your sales team is responding to Leads
- Use intent, enrichment, deduplication, contact tracking, partner ecosystem, gifting, or sales engagement technology as part of your revenue orchestration process

About the **Advanced** package

Rewire account-based processes in moments, not months with a connected RevTech stack.

$49 USD

per user license / monthly

What's included?

EVERYTHING from the Standard Package, plus...

Matching

Match Contacts to Routing.

Analyze lists or individual leads to see potential matches with custom tiebreakers.

Automatically tag Leads with information from matched accounts.

Routing

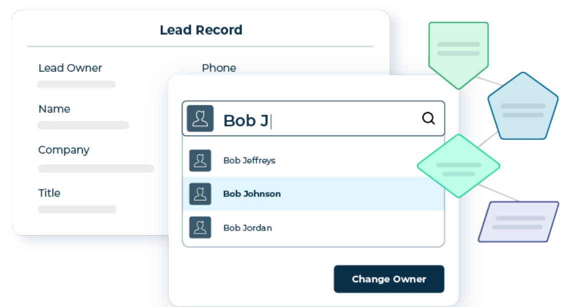
FlowBuilder for Contact and Account routing.

Conditional membership, weighting, working hours, and vacations for Round Robin pools.

Trigger routing by campaign membership changes and reference the related records for routing decisions and actions.

Create SLAs with automatic tracking and orchestrate according to SLA compliance.

Prioritize records for processing.



Available Integrations

Trigger routing based upon intent, enrichment, or contact tracking signals from 6sense, Clearbit, Cognism, or UserGems.

Eliminate duplicates using Cloudingo.

Improve partner collaboration by surfacing key partner contacts with Crossbeam.

Notify and provide users with relevant context via Microsoft Teams or Slack.

Trigger engagements via Outreach, Salesloft, Salesforce Sales Engagement, or Kronologic.

Send gifts with Sendoso within any process.

Use a preferred data provider with Generic Enrichment triggers and automation.

Is the **Advanced** package the right fit?

This package might be the right fit if you...

- Automate Lead, Contact, or Account assignments and updates in Salesforce
- Qualify accounts prior to assignment
- Need to automatically convert leads as part of orchestration
- Assign records to account teams, with reps that report to various departments
- Reference campaign membership and activities to qualify, assign, or update records
- Need to track and enforce how quickly your sales team is handling records
- Use intent, enrichment, deduplication, contact tracking, partner ecosystem, gifting, or sales engagement technology as part of your revenue orchestration process
- **Currently have the following challenges:**
    - Difficulty triggering the right process, across multiple platforms, based upon buyer signals that also come from various platforms
    - Too much time spent qualifying accounts
    - See duplicate contacts and accounts often being created in Salesforce

Common Use Cases

Optimize for Speed-to-lead

Integrate Context and Process across Tech

Minimize the Impact of Duplicate Records

Need More?

Consider upgrading to **Premium** instead if you...

- Need to assign records other than Salesforce Leads, Contacts, or Accounts
- Need to match records to Accounts, beyond just Leads or Contacts
- Need to schedule a one-time or recurring batch job in advance
- Have a go-to-market strategy focused around opportunities or multiple groups of buyers within specific accounts
- Have a sales organization spread across multiple business units or with multiple overlays, such as product lines, regions, or market segments
- Reference multiple related objects to make decisions for routing or updating records

About the **Premium** package

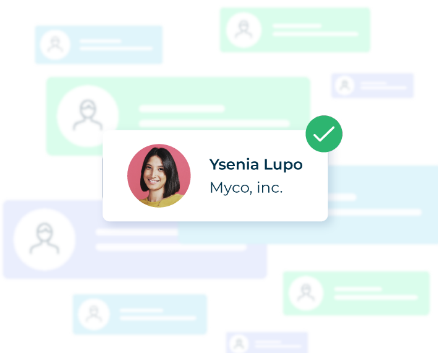
Overcome selling complexity by automating unique plays across lines of business, geographies, and teams.

$59 USD

per user license / monthly

What's included?

EVERYTHING from the Advanced Package, plus...



Matching

Match any Salesforce object to an account.

Routing

Route any standard or custom Salesforce object with Flowbuilder.

Reference a related object of any record during routing.

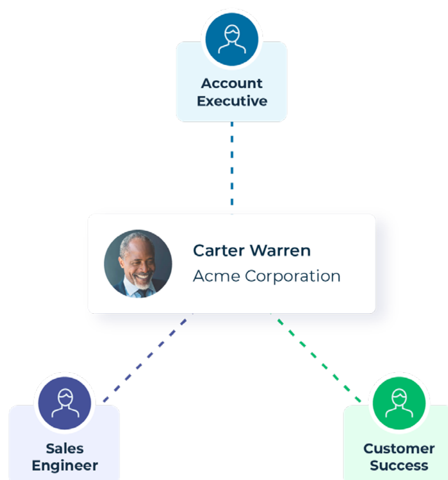
Traverse across related objects and their own related objects to make sophisticated and precise routing decisions.

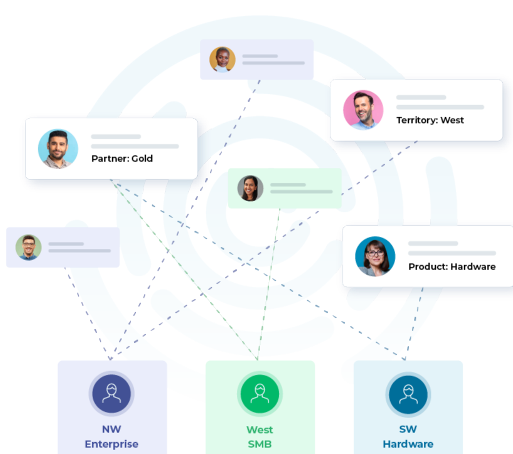
Update and trigger routing for records of other objects from within any Flowbuilder graph.

Assign contact roles for opportunities and set opportunity team assignments.

Schedule one-time routing jobs for a list of imported records or using SOQL conditions.

Schedule recurring routing jobs for routine tasks typically done as a batch.





Available Add-Ons

Enable business units - whether a region, product line, or team defined by other criteria - to manage separate and private orchestration.

Automatically connect accounts to the engagements of individual people, getting in-depth insights and visualizations into how your sales and marketing activities are engaging entire accounts.

Is the **Premium** package the right fit?

This package might be the right fit if you...

- Automate assignments and updates for any standard or custom object in Salesforce
- Need to reference a custom table of data for making precise routing decisions
- Assign opportunities to teams of people
- Reference records on related objects to qualify, assign, or update records
- Need to update a record of a different object type as part of an automated process
- Need to initiate routing of a related record after a primary record has been routed
- Need to regularly align leads or contacts with any accounts that have been reassigned
- **Currently have the following challenges:**
    - Technical debt across the organization related to routing CRM records
    - Friction when passing relationships from pre-sales to post-sales engagements
    - Complex revenue processes that incorporate the information of various objects

Common Use Cases

Opportunity-centric Sales Processes

Orchestrate Renewals and Upsells

Orchestrate Multi-Threaded Deals

Request Demo

Still need more?

There is likely a solution for you even if a feature wasn't mentioned above. Speak to your rep about available options for **Custom** implementations.

Why LeanData?

Today's growth leaders power their B2B selling with LeanData, the gold standard in modern revenue orchestration and an essential element of the modern RevTech stack. The LeanData Revenue Orchestration Platform, powered by No-Code Automation, simplifies and accelerates coordination of all the plays, people and processes needed to transform buying signals into buying decisions. LeanData is inspiring a global movement among its 1,000 customers and community of 5,000+ OpsStars worldwide, empowering them with revenue operations excellence that translates into compelling buyer experiences and competitive advantage. Join the movement!

Compare Packages

	Features	Standard	Advanced	Premium
OBJECTS	Leads	✓	✓	✓
	Contacts & Account Records	✗	✓	✓
	Opportunities & Cases, and Any Object in Salesforce	✗	✗	✓
MATCHING	Match Leads to Accounts and Duplicates (Exact & Fuzzy)	✓	✓	✓
	View Matches in Record	✓	✓	✓
	Preview & Tag Leads with Matched Account Data	✗	✓	✓
	Match Contacts to Other Records	✗	✓	✓
	Match Any Object to Accounts	✗	✗	✓
ROUTING	Visual Flowbuilder (No-code Automation)	✓	✓	✓
	By Account Data, Account Teams, and Owner Mappings	✓	✓	✓
	By Round Robin, Territory, and Duplicate Record Data	✓	✓	✓
	By Custom Variables	✓	✓	✓
	By Related Objects, Campaign Membership	✗	✓	✓
	By Custom Data Tables	✗	✓	✓
	By Service Level Agreement (SLAs with Tracking)	✗	✓	✓
	Update Related Objects	✗	✗	✓
ALERTS & REPORTS	Alert Admins, Email Users, and Notify in Chatter	✓	✓	✓
	Audit, Troubleshoot, Optimize, and Use Out-of the box Reports	✓	✓	✓
	Track & Enforce SLAs	✗	✓	✓
DATA MANAGEMENT	Process in Real-Time and via Immediate One-Time Batches	✓	✓	✓
	Merge Duplicates	✓	✓	✓
	Access Permissions	✓	✓	✓
	Convert Leads, Prioritize Records, Create Records	✗	✓	✓
	Add Account Teams	✗	✓	✓
	Assign Contact Roles/Add Opportunity Team	✗	✗	✓
	Schedule Planned Automation	✗	✗	✓
INTEGRATIONS	Notifications (Microsoft Teams, Slack)	✓	✓	✓
	Sales Engagement (Kronologic, Outreach, Salesloft, Salesforce Sales Engagement)	✗	✓	✓
	Sales Intelligence (6sense, Clearbit, Cognism, Cross-beam, UserGems)	✗	✓	✓
	Gifting (Sendoso)	✗	✓	✓
	Deduplication (Cloudingo)	✗	✓	✓
	APIs	✗	✓	✓

Paid add-ons available for Standard, Advanced & Premium:

NotifyPlus
Drive Action with Interactive Notifications

Paid add-ons available for Premium only:

Multi-Graph
Enable Orchestration for Separate Business Units

Engagement
Uncover Account-level Insights