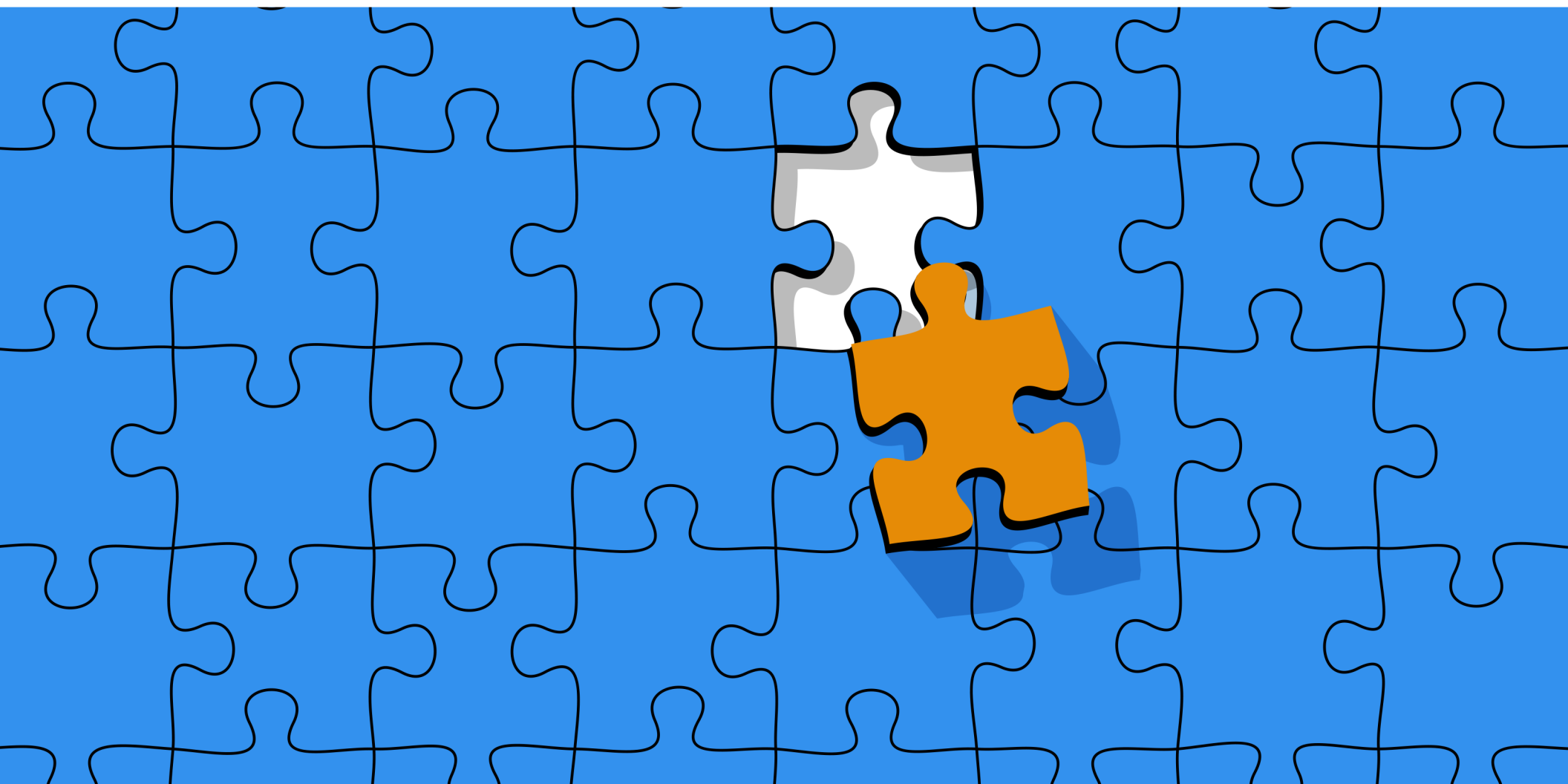


The Ultimate Guide to Lead-to-Account Matching



In sales and marketing today, the customer — and their experience with your brand — is incredibly important. Partially due to the rise of social media, the increasingly connected nature of business today means your leads and prospects now expect you to know more about them than ever. There's no hiding behind generic messages in your email campaigns; buyers want to know your company understands them and their problems, with a solution in hand.

This fundamental shift in the expectations of your buyers means you can't afford even one misstep. Not only does it waste corporate resources, but just one bad interaction can cost you a sale.

To ensure every brand experience is positive, organizations often strive to learn as much as they can about their prospects. Lead-to-account matching is an important part of improving the customer experience. In this guide, we'll walk you through what lead-to-account matching is, why it's so important, and best practices to build a robust, scalable lead-to-account matching process in your organization.

Lead-to-account matching 101

Before we can dig into how to do lead-to-account matching right, we need to clearly define it. Lead-to-account matching lets you connect people who show interest in your business to the companies where they work.

What are leads, contacts, accounts, and opportunities?

One important concept about these 4 terms is that they are mutually exclusive. For instance, while a lead is part of an account, and an account may have an opportunity associated with it, each of the terms below represents different sets of information. We'll go into more detail later, but this is why your organization needs to define these concepts for your sales and marketing processes to be efficient and scalable.

Leads

A lead is a person who has shown interest in your company in some way. It could be someone who downloaded an asset or submitted a "Contact Us" form on your website. It could also be someone who attended an event you sponsored or even someone who simply interacted with a company post on social media. For our purposes in this eBook, leads represent someone that your salespeople should contact to try to gauge their interest in your product and hopefully close business with them.

Accounts

An account represents a company or organization that has many contacts within it. Recently, the concept of account-based marketing, targeting one specific company's employees with very specific messaging to tempt them to try your product or engage with your company, has exploded in popularity, making lead-to-account matching an especially valuable process.

Contacts

A contact is a person known to your company: you are certain who that person is, have a record of their interaction with your organization, and have likely already made contact with them. Contacts are what we will be converting leads into to represent that they are part of a larger entity — an account — in our customer and prospect data.

Opportunities

When a lead, contact, or account becomes actively engaged with your company and has expressed some interest in purchasing your product, this event can create an opportunity, usually referred to as an "open opportunity." Opportunity creation depends on multiple criteria set by sales or marketing and may not be automatic. In lead-to-account matching, the concept of opportunities is particularly important when converting leads to contacts, as certain customer relationship management (CRM) systems require you to decide whether to concurrently create an opportunity when you match an account.

What is lead-to-account matching?

Lead-to-account matching is the process where leads (people you're trying to sell to) in your marketing and sales processes become known contacts and are matched to accounts (organizations your company has information on) in your systems.

Here's an example:

Let's say you have a demo request form on your organization's website. A proper lead-to-account matching process would take anyone who submits that form (a lead), compare it against your database of known people or organizations (accounts), convert them to a contact, and store it with the accounts where they match information. This is usually done by checking the lead's email address domain against your contacts' or accounts' website domains.



IMPORTANT

Doing lead-to-account matching in a scalable way means doing more than simply writing a script to check the email address and website domain fields. Acting rashly can ruin your data and have unintended consequences that force you to waste valuable time cleaning it all up.

Why match leads and accounts?

In today's hyper-connected world, the difference between making a sale and not is often based on the experiences of the people involved. Social proof, personal connections, and positive interactions are key influences to determine if that next meeting is booked in the sales process. Any snag — especially early on — starts a ripple that easily becomes an insurmountable tsunami.

That's why ensuring sales and marketing teams have the most up-to-date and accurate information is so important. Slip-ups (e.g. cold calling someone who's already speaking with another rep at your organization) can mean deals don't get closed in your favor. Or, improperly judging the interest of a company by letting additional leads stagnate in the funnel (having never matched to the account) can unnecessarily bloat the sales cycle.

Automated lead-to-account matching brings added benefits by doing the following:

- Preventing human error
- Eliminating manual search of multiple databases or systems where customer data is stored
- Keeping data up-to-date by matching each time a new lead is created

Because of the multiple systems involved (e.g. customer relationship management (CRM) software, marketing automation tools (MAT), customer experience platform (XP), etc.) customer data can very easily become inaccurate throughout a customer's lifecycle. Whenever they interact with your company, it adds more data that's invaluable to your teams but ultimately increases the potential for — and complexity of — issues if you have manual processes.

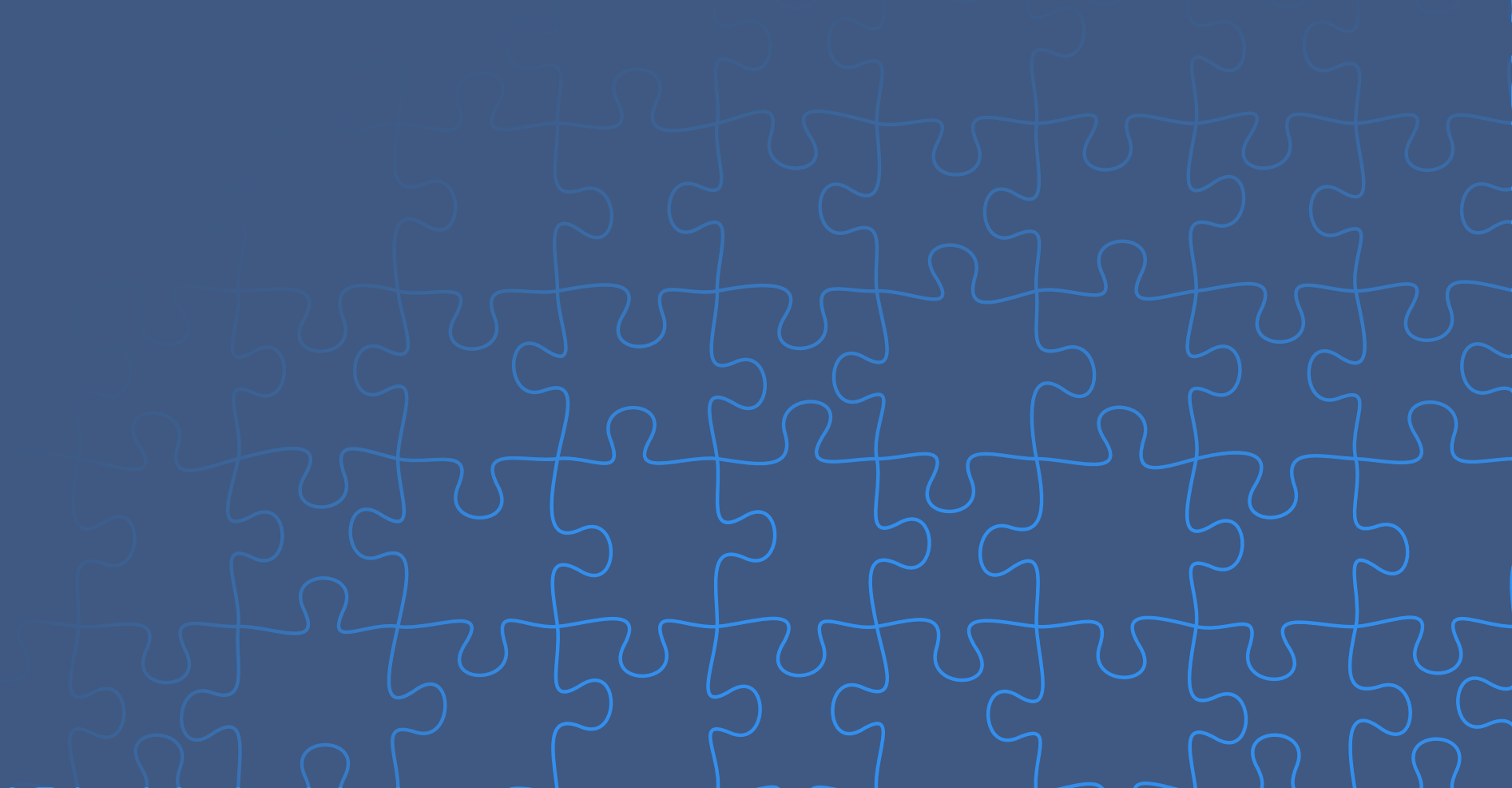
Bringing on technology to sync with all your top business systems, perform the necessary actions, and then send that data back out to each system is invaluable. When you add extra functions such as data enrichment (augmenting lead data with previously unknown information such as phone numbers) or automatic personalized notifications (e.g. sending Slack messages to the sales rep when their assigned account submits a form on the website), you set the foundation for being able to do something truly game-changing.

The best way to build your lead-to-account matching process

Before you start down the path of figuring out your organization's lead-to-account matching processes, you must reserve time to think through all the details. It cannot be stressed enough that you are about to do some exciting things, so give yourself enough time to get it all done in one go vs. trying to do it in 15-minute breaks here or there. So go ahead, block a couple of hours off on your calendar, and we'll be here when you're ready.

We're about to go through a basic example to get you in the right mindset while creating a visual flowchart of your lead-to-account matching process. For this example, we're assuming your CRM is the source (and destination) of your lead data. Once you have figured out your preferred process, you can expand it to sync information across your whole stack.

Want a little extra help? [We'd love to chat.](#)

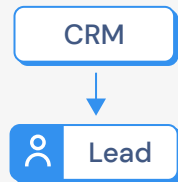


Step 1:

What is your data source and destination?

For most organizations, the answer to this question is easy: your CRM. Even if you're using additional systems, such as a marketing automation tool (MAT), you likely have a workflow that sends leads into your CRM. For the basis of this exercise, we'll assume you are pulling and pushing information from and to the same place, using your CRM as your "single source of truth." For most smaller organizations, this is a fine process. Eventually, you should aim to distribute the data you're using and cleaning in this lead-to-account matching process to the rest of your tech stack. It's with this scalability in mind that we recommend this flowcharting exercise. (Future you will thank you.)

For now, our flowchart will simply begin with our CRM:



Step 2:

What makes up a lead?

This step isn't about a book definition, but rather a reminder to consider the items you want to have in every lead. What things (AKA fields) do you want to know about your leads? Below is a list of the usual fields you'd expect to have as part of a lead record. Often, you can look at wherever you're storing lead information today and use those fields as a baseline. If you're starting from scratch, feel free to take from our list and add your own.

Salutation	Website
First Name	Business Address
Last Name	City
Suffix	State
Job Title	Zip Code
Email Address	Country
Phone Number	Industry
Company	Organization Size

Once you've defined the list of fields you want to keep info on about your leads — this list does not need to be exhaustive and can be expanded later — think about any information you want to validate. For example, do you only want to have a defined list of industries your companies can identify as? Do you want organization size to fall into specific buckets? Determining these lists now can help to speed up your processes later on.

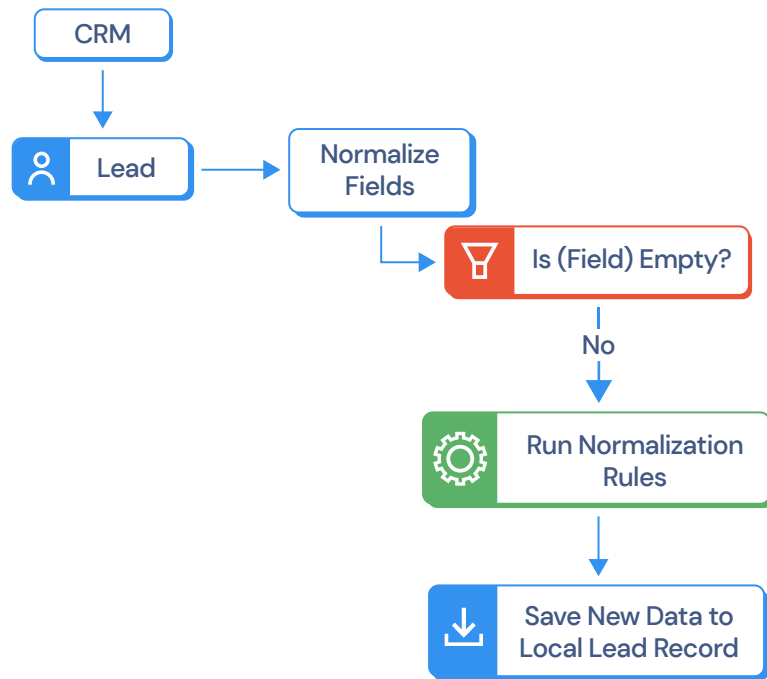
Step 3:

Normalization

To make your lead data as accurate as possible, it's important to normalize the information on the record. Data normalization means making sure that your lead fields contain not only some information, but also the expected type and format. Normalizing data is important to increase the quality and usability of your data and reduce errors in your matching process. This process is varied and ranges from things as simple as capitalizing only the first letter of names to ensuring the many variations of "United States" are consistent.

For each of the fields you specified in step 1, now it's time to think through what could go wrong with human entry on those fields and build rules for how to fix them.

Here's an example of what our lead-to-account matching process looks like so far:



SOME COMMON NORMALIZATION RULES:

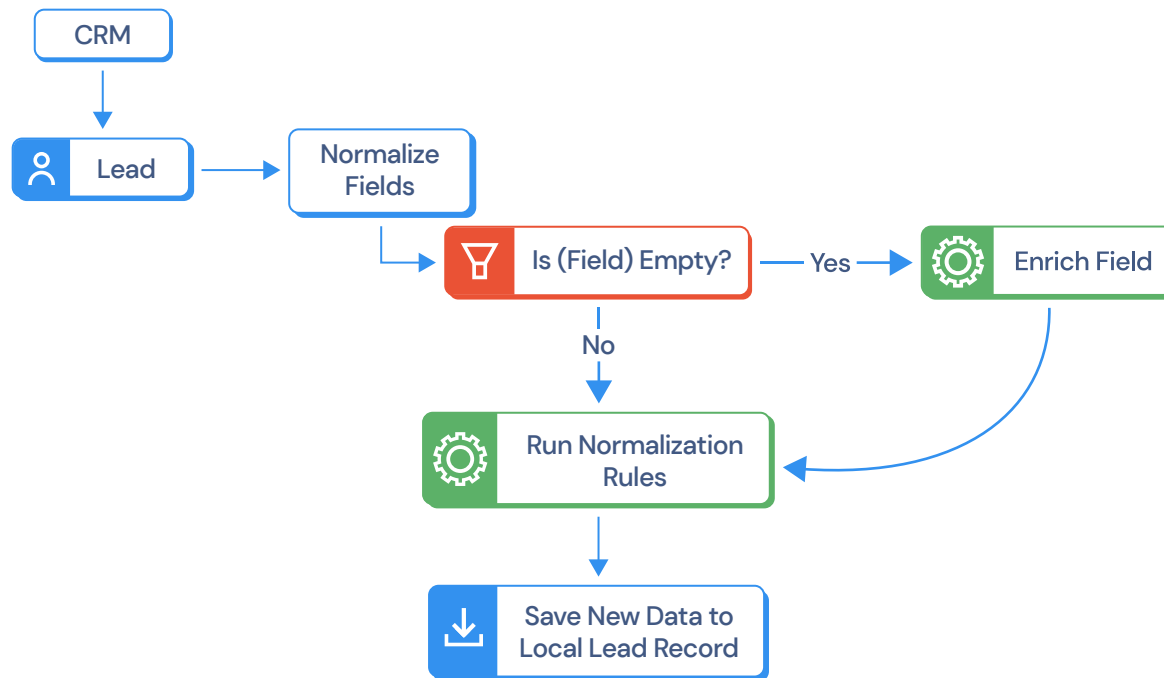
- Salutations, first & last names, suffixes, and titles are title case
- Email addresses are all lowercase
- Countries are two-letter codes
- US zip codes are #####-#### (and if not, append "-0000" to them)
- Industries match a specified list and are title case

Step 4:

Enrichment

In your lead-to-account matching process, you'll likely be missing some data. One way to fill that gap is to use the email address, company name, or website to enrich the lead with additional information. If you don't have an enrichment vendor, we do highly recommend looking into one. Luckily, adding enrichment after determining your lead-to-account matching workflow is fairly easy with the right software. Essentially, the goal of this step is to fill in any missing information from your lead. For instance, you may not ask a lead what size their organization is, but it's something **an enrichment vendor** would be able to easily tell you.

Below is where we placed enrichment — at the field level — in our working example.



While we only show a single instance of normalization and enrichment in this flowchart, your full lead-to-account matching process should have normalization and enrichment steps for every field you determined was important for your lead definition in step 2.

Step 5:

Merge & dedupe leads

Our next step is merging and de-duplicating the leads in your system — no one likes duplicate leads. This process exists to minimize the possibility of duplicate efforts, whether that is marketing sending emails or sales reps requesting meetings. When done well, this process also ensures that when a person takes multiple actions (e.g. submitting a demo request and attending a webinar), they are recorded as a single record (person) in your prospect or customer data.

There are a lot of different criteria used to merge and deduping leads. For instance, if the first and last name, as well as the email match across two leads, it's likely the lead is the same person. For that matter, a lead's email address in and of itself can be used as a unique identifier and used to merge and deduping records.

Based on the information your organization has on your leads, your organization's rules will likely be different than another's. To help get you started, we've listed some examples below. You can think of the rules as "if this then that" sets. For instance, if the first and last name are the same, as well as the email address on two different leads, then those two are actually the same lead and should be merged.

Finding Duplicate Contacts/Leads

- Email Address
- OR (First Name AND Last Name AND Title AND Account Name)
- OR (First Name AND Last Name AND Email)
- OR (First Name AND Last Name AND Phone AND Account Name)
- OR (First Name AND Last Name AND Mailing Street AND (City OR ZIP OR Phone))
- OR (First Name AND Last Name AND Mailing Street AND Title)
- OR (First Name AND Last Name AND Mobile Phone)

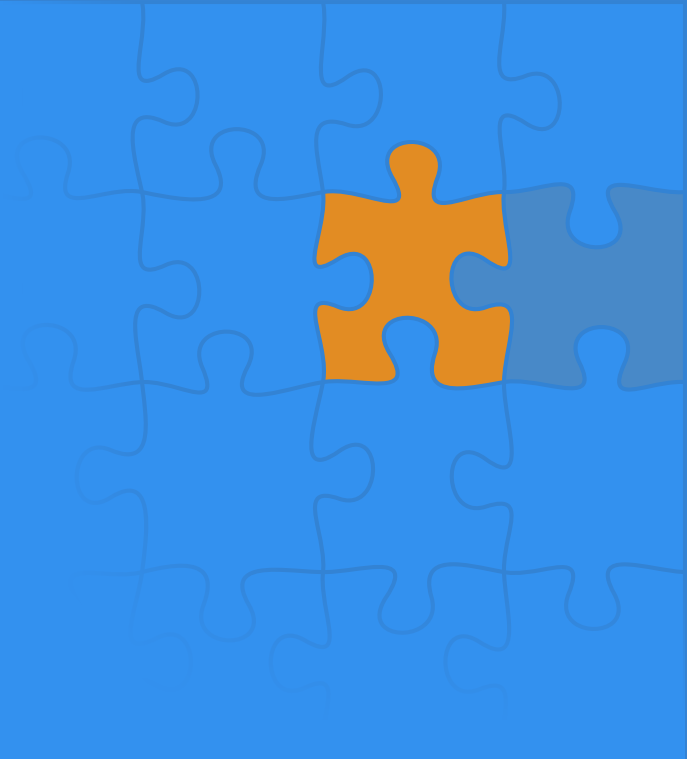
Step 6:

Create new “matched account” fields

On top of the standard fields that are part of your CRM (or other systems), we also recommend creating some custom fields for you to run criteria against on your lead records. When you perform an action (such as converting a lead into a contact in Salesforce), it’s often a one-way street and very difficult or impossible to undo. Adding extra fields such as your own unique ID field, or a simple “Is Matched Account?” with true/false values sets you up for far more personalized and automated processes than you can accomplish with just the standard fields. An example of how to use these fields is in the next step.

Below is our list of recommended custom fields:

API Name	Display Name
Match_Account_ID	Match Account ID
Match_Account	Match Account
Match_Account_Classification	Match Account Classification
Match_Account_Name	Match Account Name
Match_Account_Open_Opps	Match Account Open Opps
Match_Account_Owner	Match Account Owner
Match_Account_SDR_Owner	Match Account SDR Owner
Match_Account_Type	Match Account Type



What is a unique identifier?

Unique identifiers are an especially important concept in the realm of databases. Essentially, they are a single group of letters and/or numbers — called a “string” — that represent one, and only one, thing. Here’s an example:

A person may go by “John Smith”, but as we all know, there are thousands of “John Smith”s that exist. Even when you add in middle names and suffixes, uniquely identifying a single John Smith is impossible by name alone. But if you have the social security number — his unique ID — of the John Smith you need, you can ensure you have the right one. Storing this unique key in a matched account field makes it easier to compare, especially if the information you’re comparing comes from multiple systems.

Step 7:

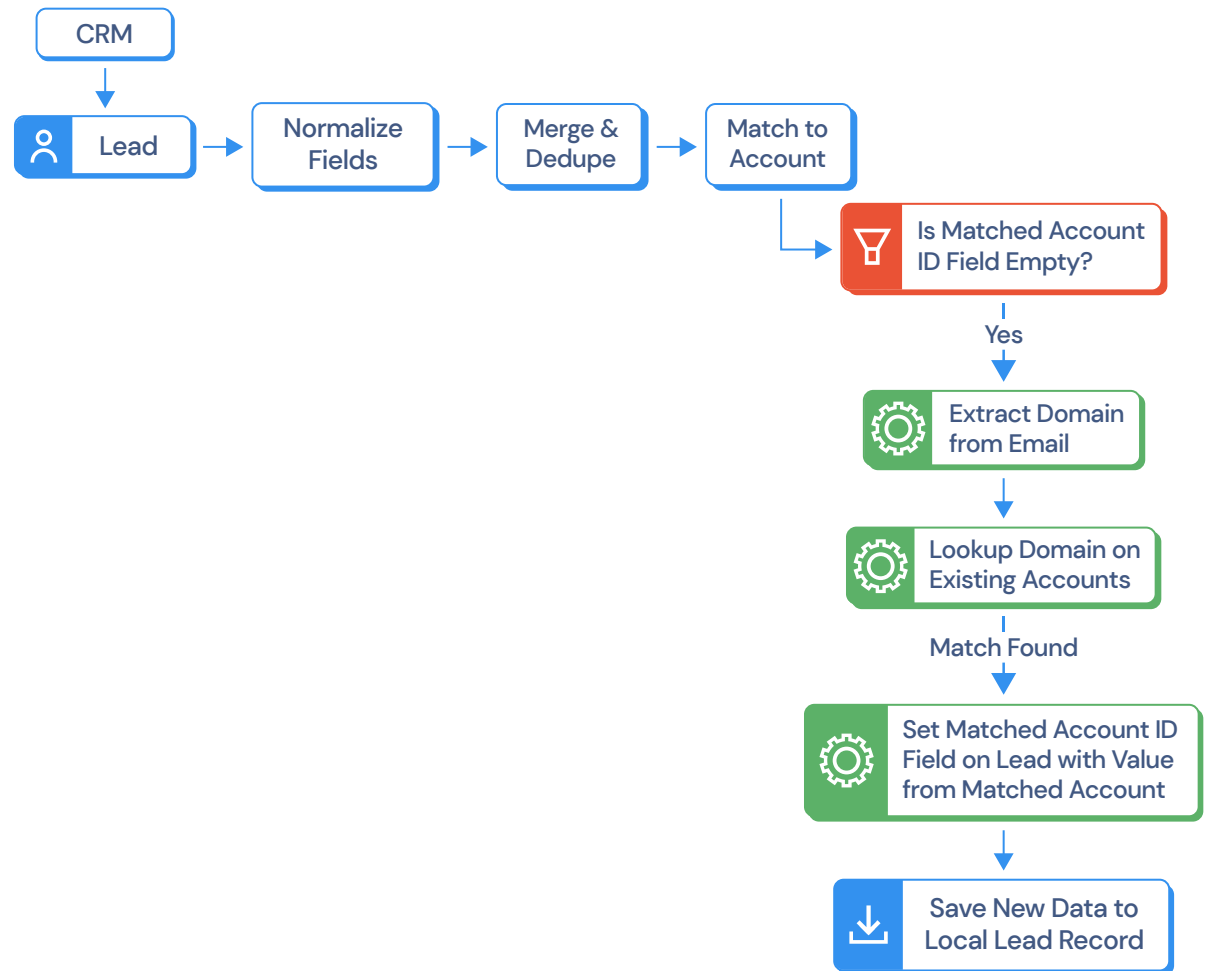
Matching accounts

Now that your foundational processes are defined, it's time to write the rules for actually matching leads to accounts. By far, the most accurate and easiest method to match leads to accounts is by checking the lead's email address domain against a contact or account's website domain. (Note: you'll want to build special rules for free email domains such as Gmail.)

Because we created the custom "Matched Account ID" field earlier, we can set up some guardrails to ensure no irrevocable damage is done to your data. Here's what the individual steps look like:

1. Pull out the domain from the lead's email address.
2. Search that domain in your account database.
3. If an account is found, set the lead's "Matched Account ID" field to the account's unique number (the unique ID in your CRM).

This effectively matches the lead to the account in your CRM and sets you up to take a few different paths to get this lead now into the hands of your sales team.



Step 8:

Converting a lead to a contact

Here is where steps can start to greatly diverge based on your organization's sales process and structure. While we won't go into the depths of lead routing in this eBook, below are two examples of how converting leads to contacts could be handled.

Automatic conversion

For the most automated process possible, auto-convert your leads into known contacts on an account. This is a great choice for organizations that have and follow clearly defined processes. For instance, your leads could follow the process below:

1. Check if the lead matches another contact on the account. (You can use the same merge and dedupe criteria we used earlier.)
2. If it does, you can convert the lead to a contact, which will then allow you to merge the contacts in your CRM.
3. If it's not a duplicate contact, check if your matched account ID custom field has a value.
4. If it does, look up the account owner and then set that person as the owner of this contact.
5. Then, convert the lead to a contact.
6. If there is no matched account ID, you can then pass this lead into your organization's lead routing process.

Manual conversion

If you'd like to take a more manual approach, you can leave the conversion of leads into accounts to your sales or operations team. This does take significantly more time, and if your organization doesn't have the cleanest data or most defined processes, doing this process manually for a time can help you figure out the potential hurdles.

So, once you've cleaned and deduped your lead data, you can sort them into whatever buckets you need. A basic example is:

- Matched leads get routed to the account owner to handle
- New leads get sent through your organization's lead routing process



SYNCARI TIP

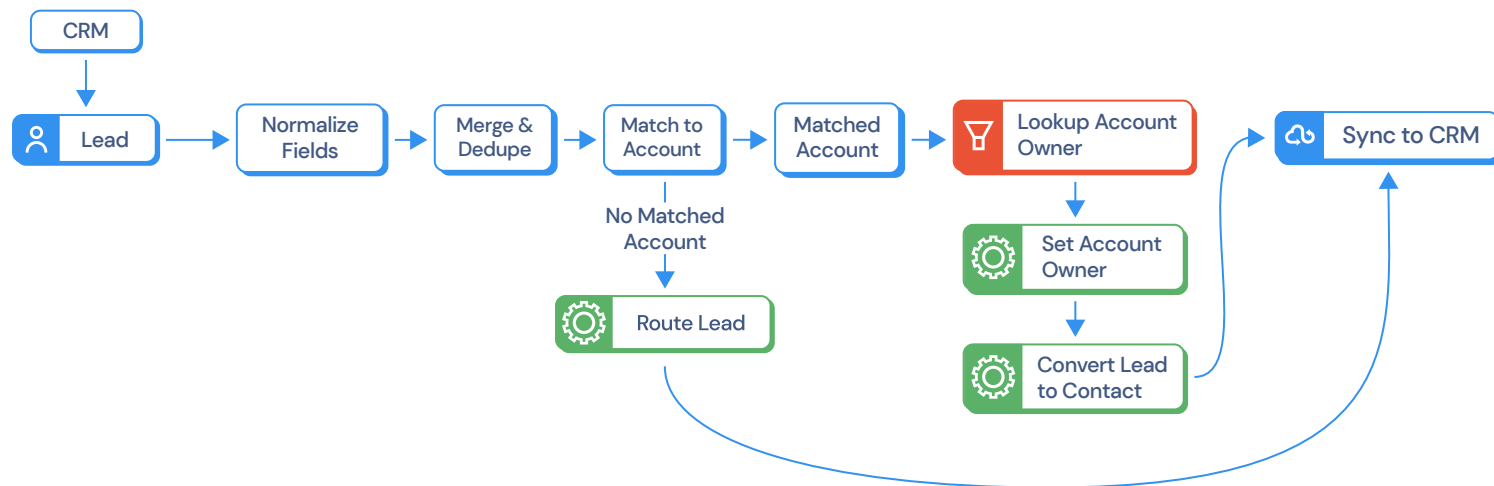
When you choose to auto-convert a lead into a contact, there are several steps normally required of you in your CRM, such as determining the creation of an opportunity. These can all be handled automatically as part of your lead-to-account matching process in our data automation platform.

Step 9:

Sync data to your end systems

The last step of this whole process is to ensure the source of your lead data is updated with all the work you did. As we discussed earlier in this eBook, you should also — maybe in a future iteration — aim to distribute this clean data to the rest of your tech stack. Distributing the data ensures every person who engages with your leads is doing so with the same information.

If you're aiming to save as much time and headache as possible, a platform such as Syncari can automate your lead-to-account matching process based on the rules you create.

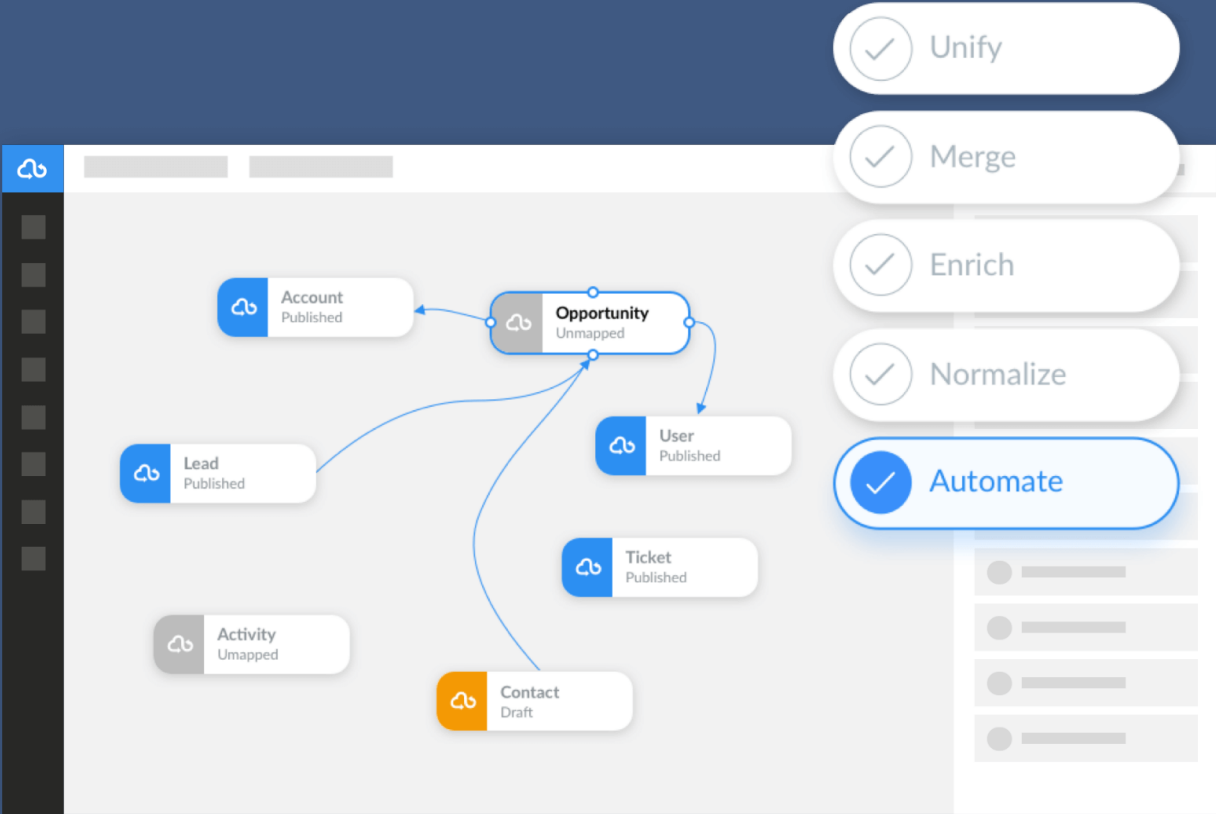


Going a step further

Lead-to-account matching is just one part of the larger lead management process. From lead scoring to lead routing and more, putting all the pieces together to create one picture of your customer is an important endeavor for your business. But it takes time, planning, and a whole lot of thinking to get all those pieces to line up right.

Syncari's data automation platform can help you not only create the workflows necessary to first, get all your systems in your tech stack speaking the same language, but second, get it all automated. Imagine how much time you could save every day.

Want to see how? [Let's talk.](#)



Syncari, the world's only no-code data automation platform, empowers revenue leaders to make better decisions by providing trusted customer data in the right place at the right time. We do this by unifying and automating data across the entire customer journey, from lead to cash, unlocking efficiency and accelerating growth.