





### 3. Lead Distribution and Withdrawal

This is a critical feature for vendors, first of all to make sure a set of leads can be given to a set of partners, but also, if partners are not following up after a certain time, to be able to withdraw the leads back into the Prospect Records Management system for redistribution to other partners.

### 4. Lead Distribution Rule Set

A vendor should be able to push leads manually or automatically to a set of partners based on the lead type (SMB, Mid-Market, Enterprise, or other categorization) and also to match partner competencies, locations, and so on. This ability to create rule sets adds an important layer of automation to lead distribution, which gets the leads to partner team as soon as they are generated.

### 5. Account Protection

Certain end user accounts are managed by large or premier partners and a vendor may want to protect these accounts. The lead management system has to be able to protect one or multiple accounts and automatically push leads from those accounts to specific partners and sales people. On the other hand, if a vendor wants to have partners compete for certain accounts, they should be able to keep these leads as open records.

### 6. Rewards Integration

By integrating proper rewards and incentives, a vendor can greatly drive partner engagement and status reporting. We all know sales reps are busy and they have their own preferred CRM systems. However, a proper incentive structure around reporting can substantially enhance a vendor's ability to track lead status, by using sales rewards to motivate individuals to enter lead status details into the platform – either manually or by automatic synchronization by connecting their CRM accounts to the lead management system.

### 7. Dynamic Reporting

A state of the art lead management system should be able to provide dynamic reporting to both partners and vendors, so that lead and pipeline status can be tracked at multiple levels. Since selling is a competitive sport, the ability to share stack ranking among individual partner reps also drives better participation and adoption of channel programs.

While such a long list of requirements may be daunting to anyone considering a lead management system, a robust Channel Marketing Automation platform such as ZINFI's Partner Relationship Management (PRM) platform can not only facilitate lead distribution, but also substantially increase ROI.

“A lead management system is an automated, programmatic way of generating, allocating and tracking the performance of end user leads that have been provided to channel partners.”



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