

Smart Lead Allocation with Vymo

Automation Framework

Vymo's scalable, out-of-the-box toolkit for allocation automation

Module Settings	Q Search on name, phone, email & address Cla	ear Vymo Superuser 👻 Last Login: Mon, 22 Mar · 05:39 pm		
Home > Prospective Agents > Allocation Settings		Discard		
 What is Allocation and how can you configure it ? Auto Allocation helps you in defining the rules for assigning the agents whose rules they satisfy. The unallocated leads, it To assign leads using auto allocation you'd need to - Create Rule Sets follow the waterfall model. You can re-prioritize t rules within the rule set can be reordered by simply dragging 	any, are then surfaced on the Manual Allocation UI a rule set > Add rules to the rule sets > Define the selecti he rule set by changing the "priority number" associated with	on criteria		
Bandwidth Rules 1 Open lead count Metric + Add Rule	esser than V 30	clear V X Superuser v r · 0539 pm		
2 P&C Producers		×		
Rules				
1 Name Lead	✓ is Equal to ✓ Type Use	er x 💌 X		
2 Reporting manager Use	✓ is Not Equal to ✓ User Role	User X 🔻 X		
3 User Role User	✓ is Equal to ✓ Agent	× • X		
+ Add Rule				
+ Add Rule Set				
Selection Criteria				
Select the criteria for the selection of filtered leads				
Round Robin				
Round Robin				

Set up allocation rules via a simple graphical interface

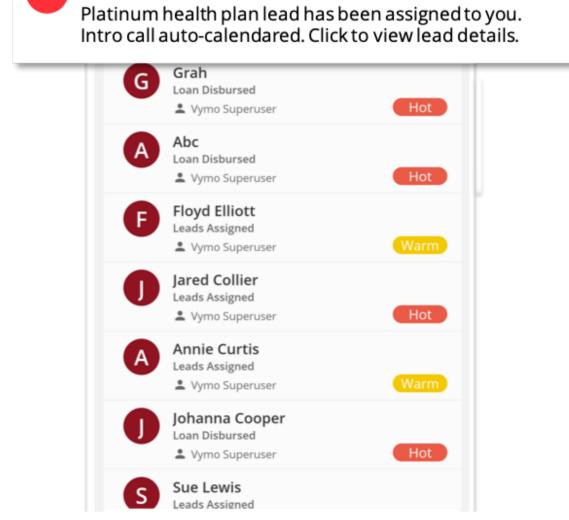
- Enterprise self-serve ready
- Multi-parameter rule builder

Routing algorithm kicks in as soon as a new leads flows in

- Cross-channel lead inflow
- Leads from website, campaigns

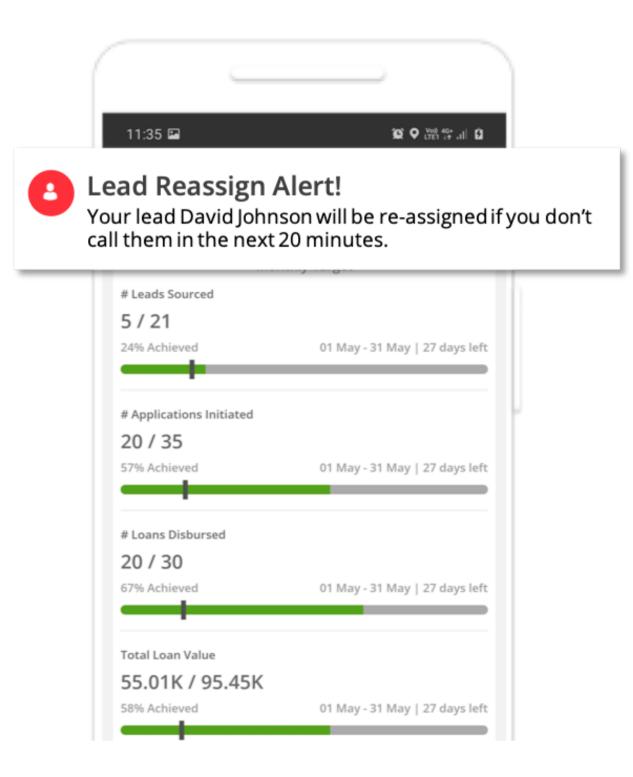
ample Onboarding portal		
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ull Time Employee - Public Sector 🗸 🗸	Email ID* david@demo.com	
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Sales reps gets instantly notified on the new lead

- Nudge to get first call in quickly
- Customizable notifications



Watch and re-allocate based on best-practice playbooks

- Lay out conversion playbooks
- Drive best practice behaviors

Best-Fit Mapping

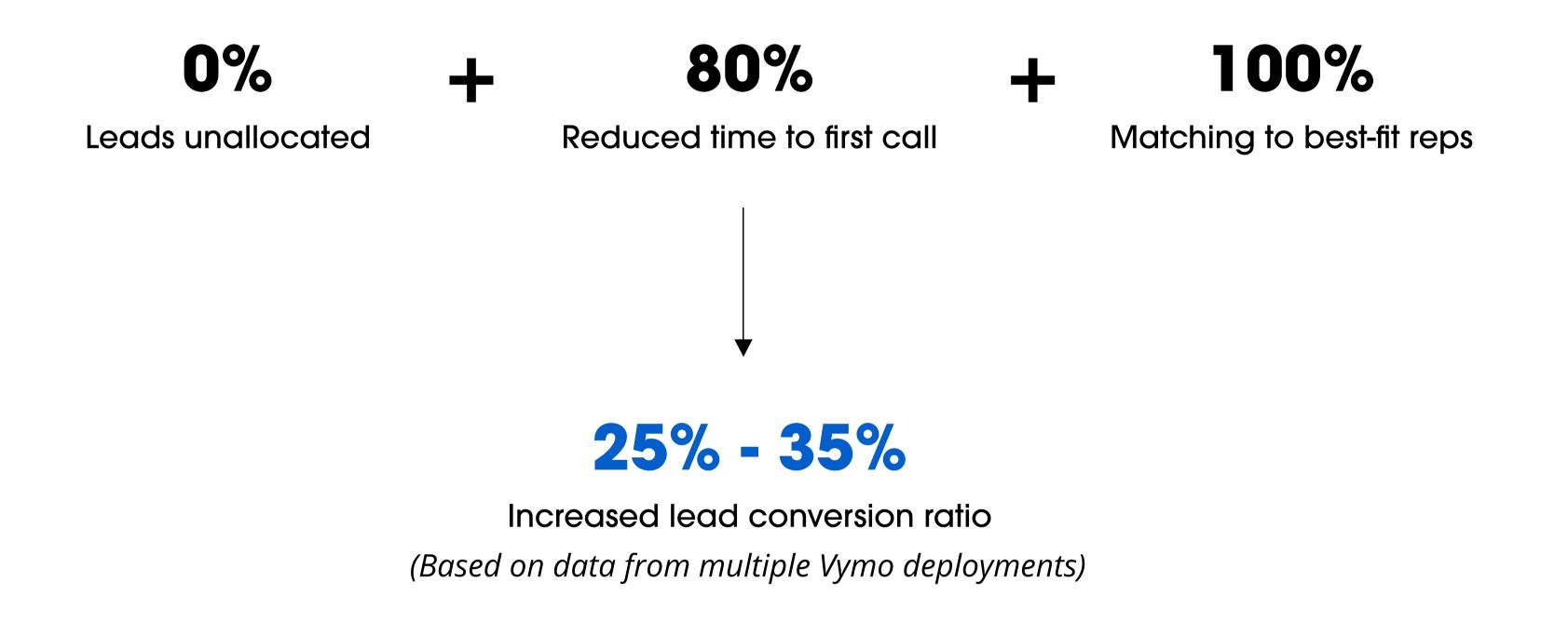
Easily setup and fine-tune lead routing algorithms on multiple **real-time parameters**

Branch or Territory	Allocate based on rep's designated territory
Current Location	Optimize based on live location of rep & lead
Availability or Backlog	Reps with lower backlog – likelier to respond ASAP
Lead Category	Based on product type, lead source, priority, etc.
Salesperson Expertise	Route based on rep profile, completed trainings, etc.
Salesperson Track Record	Rep's prior conversion rate for the given lead category
Rep Responsiveness	Rank reps based on speed of response and map accordingly

In-person vs Virtual	Route to best-fit or nearest reps based on engagement mode
Customer Ratings	Use CSAT scores to move reps up and down the priority order

Impact

Smart lead allocation has a significant cascading impact on lead conversions

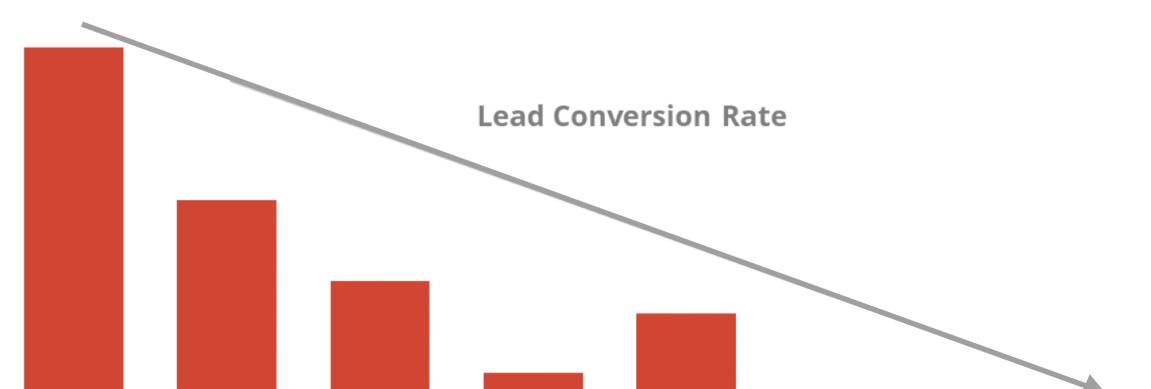


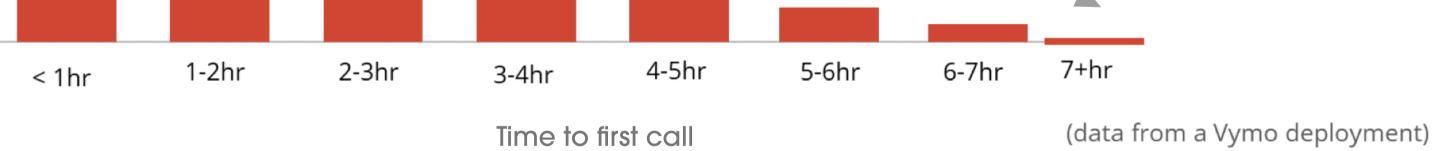
Vymo's data science team can run periodic exercises to evaluate the effectiveness of the allocation algorithm and suggest enhancements

Why This Matters

Auto allocation and follow-up nudges are guaranteed levers of productivity

Time to respond has 10x on conversion



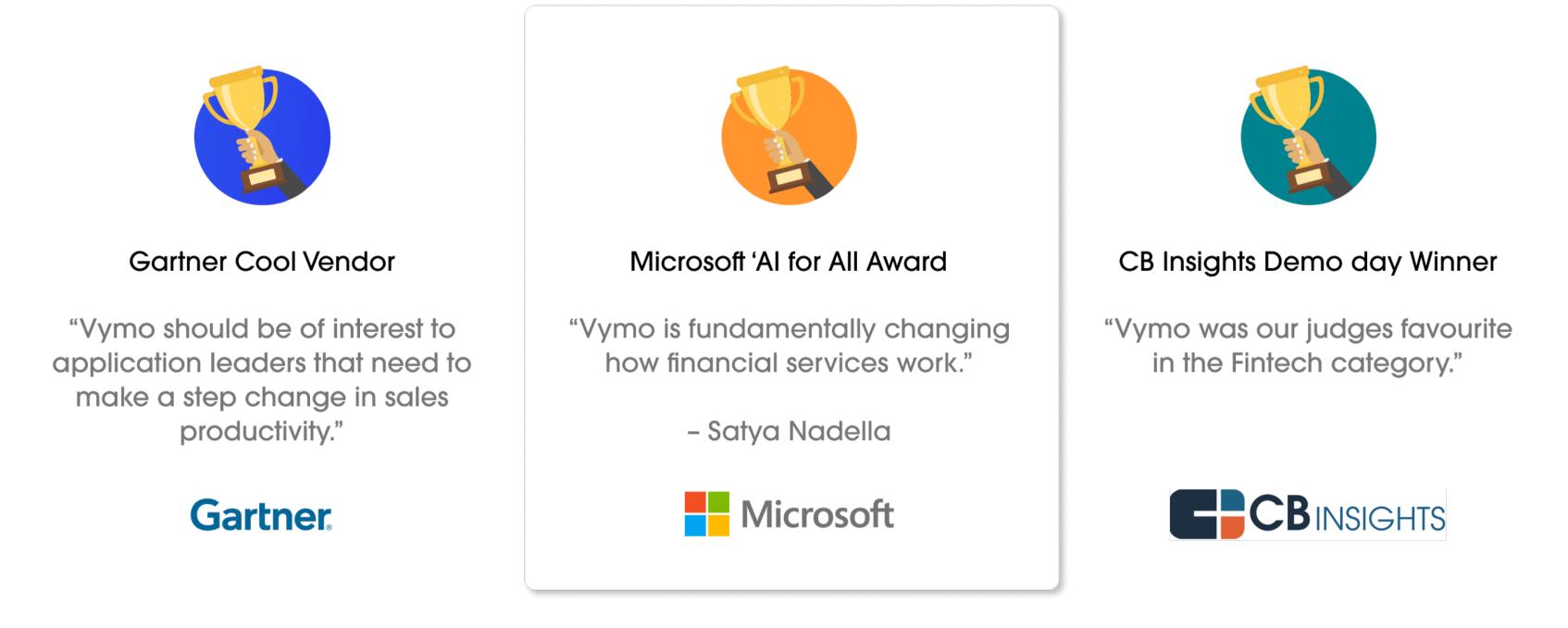


About Vymo

Vymo (www.getvymo.com) is the Sales Excellence Cloud for Financial Services, trusted by over 200,000 salespeople across 60+ financial enterprises across the world. It solves for frontline personnel, sales managers, and business leaders through mobility, insights, and industry playbooks. Global leaders such as AIA, AXA, Sunlife, FE Credit, Generali, and HDFC Bank trust Vymo to improve sales and distribution efficiencies.

Vymo is recognized by Gartner as a Cool Vendor and is funded by Emergence Capital and Sequoia Capital.

Recognized for Driving Sales Productivity



200,000+ Sales Reps across 60+ Enterprises use Vymo to crush their quotas









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