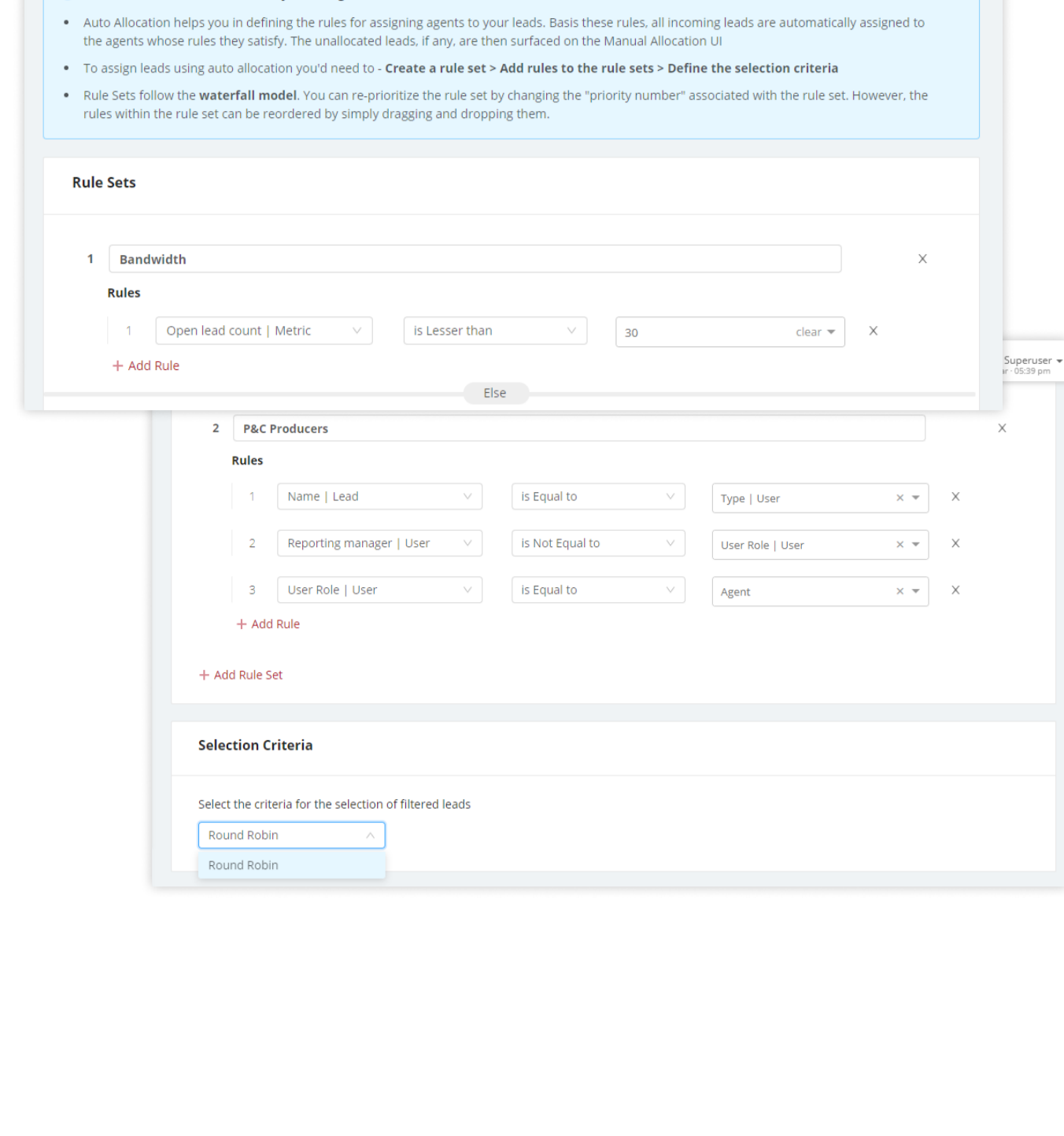


Smart Lead Allocation with Vymo

Automation Framework

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

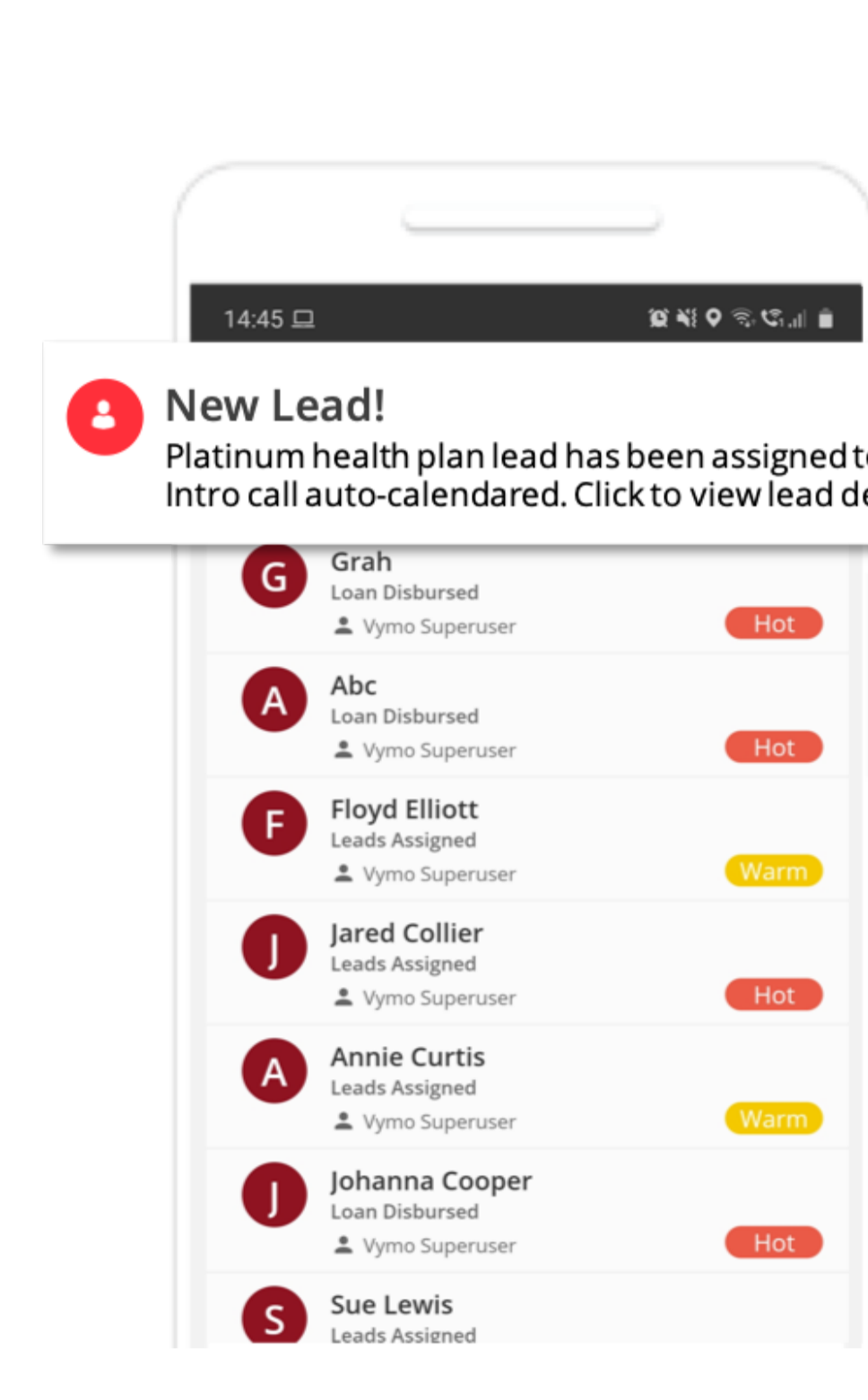
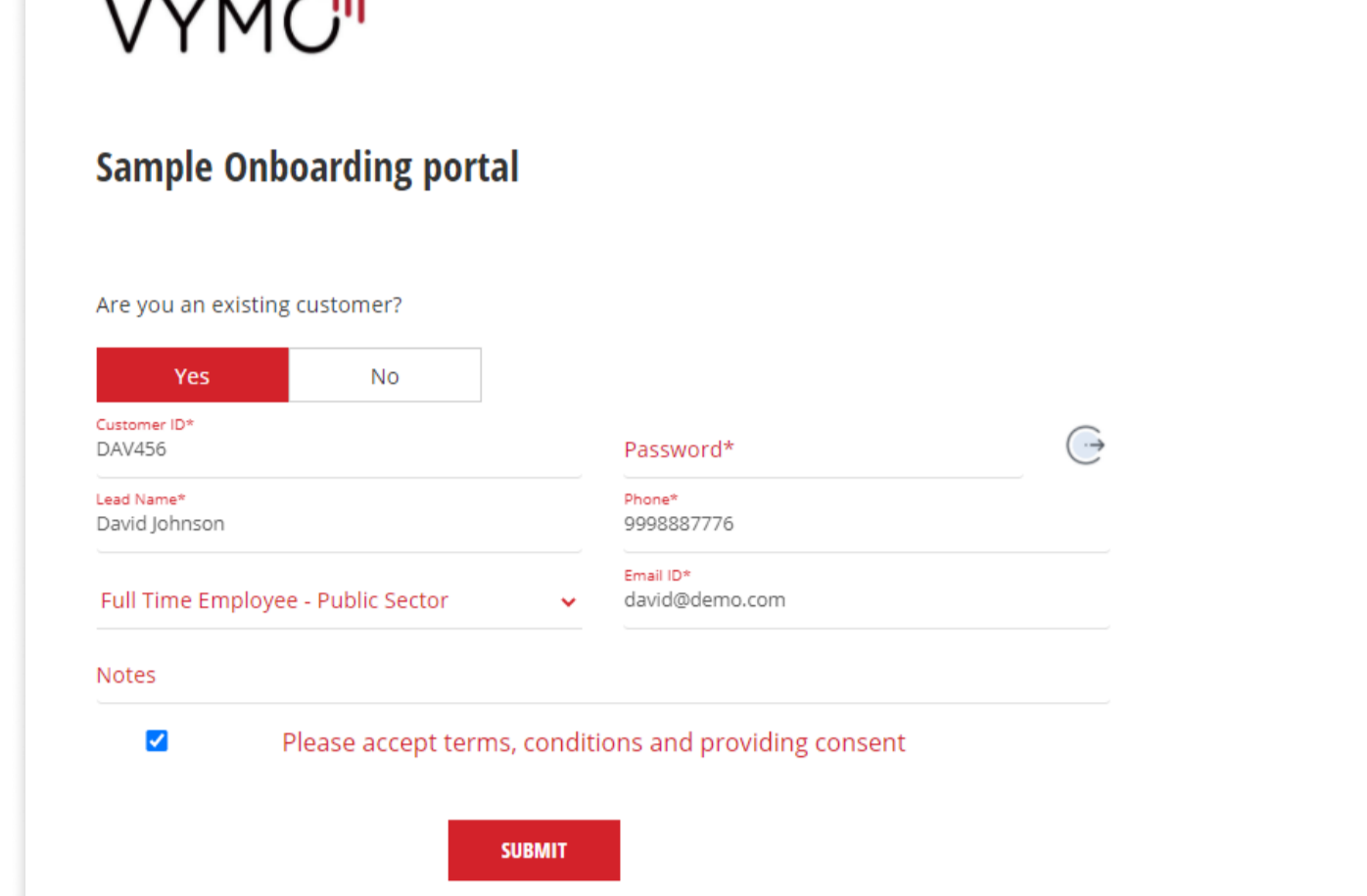


Set up allocation rules via a simple graphical interface

- 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

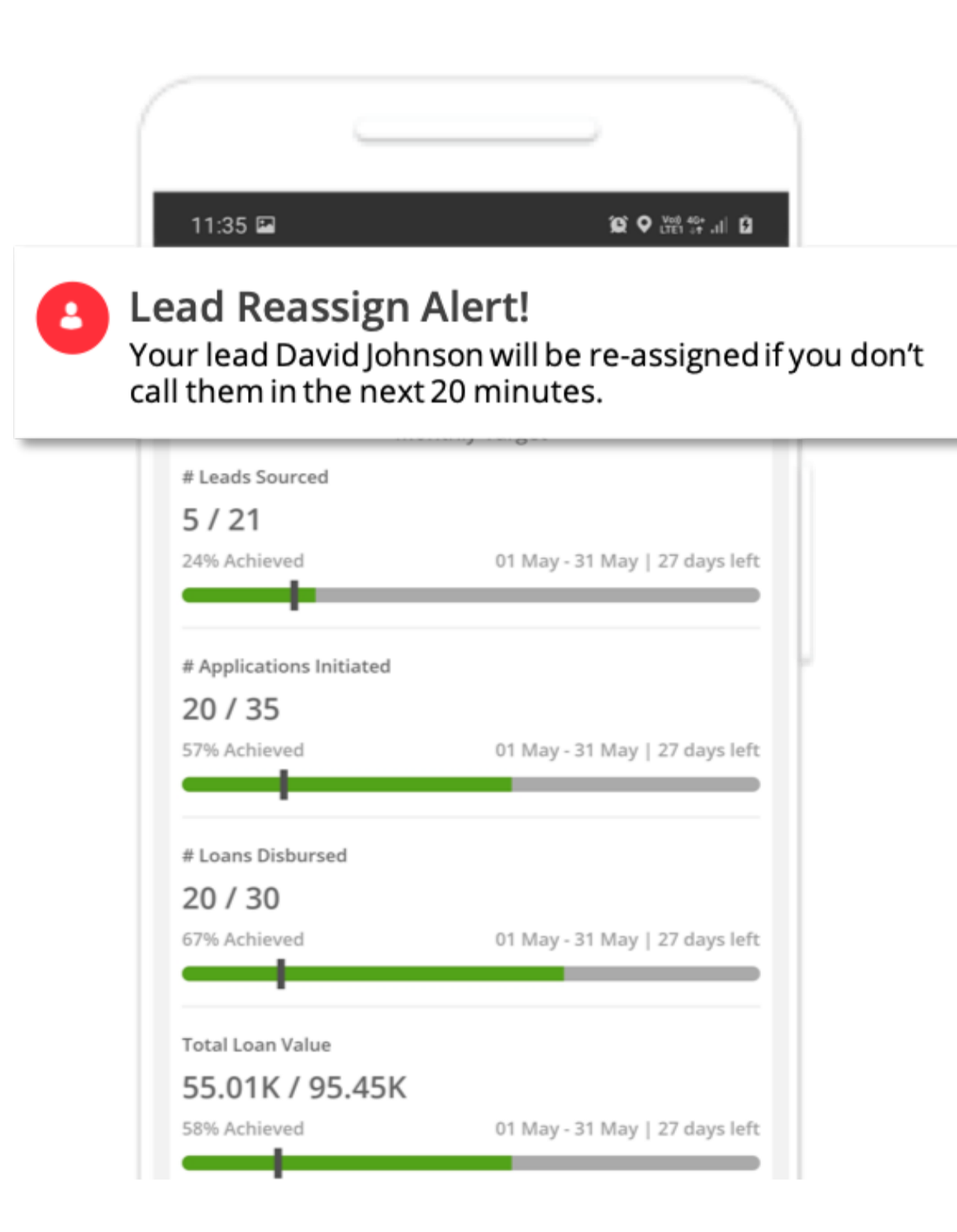


Sales reps gets instantly notified on the new lead

- 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



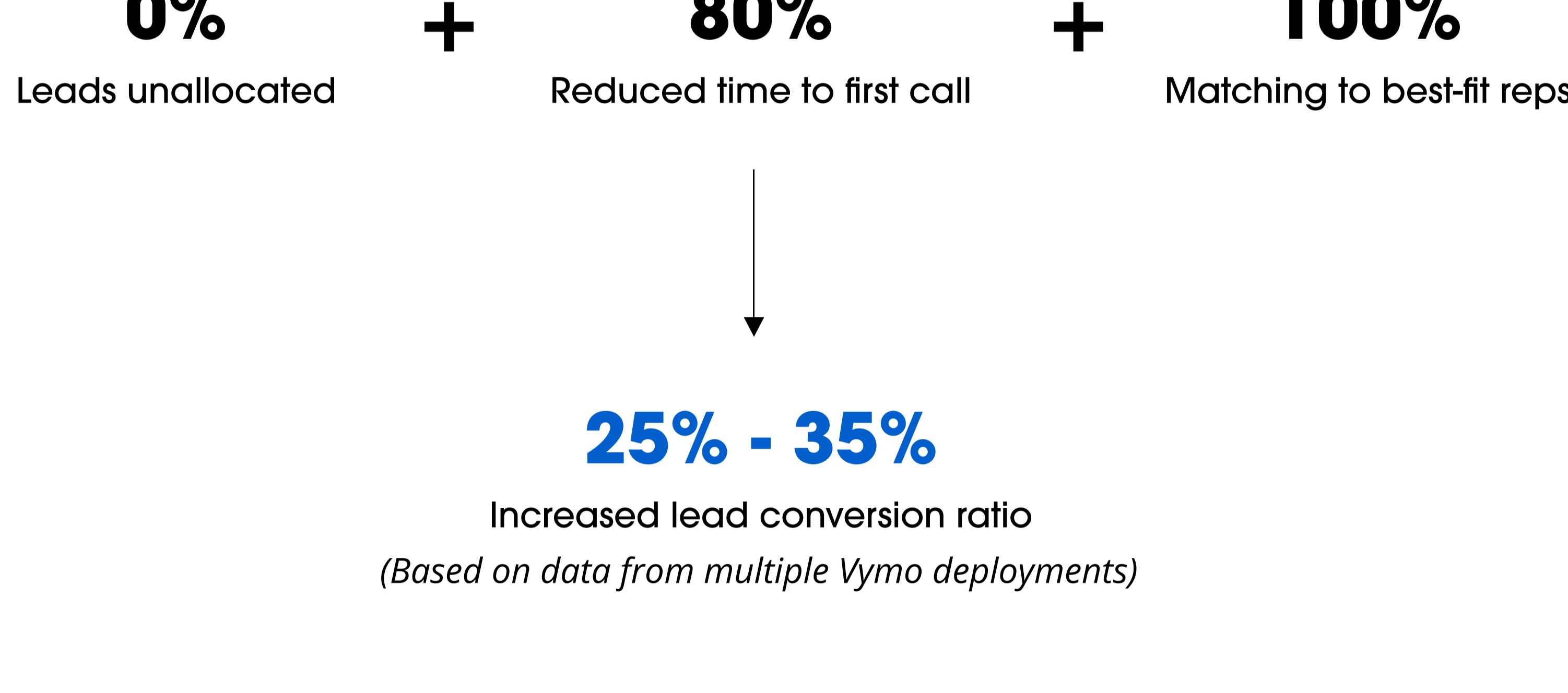
Best-Fit Mapping

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

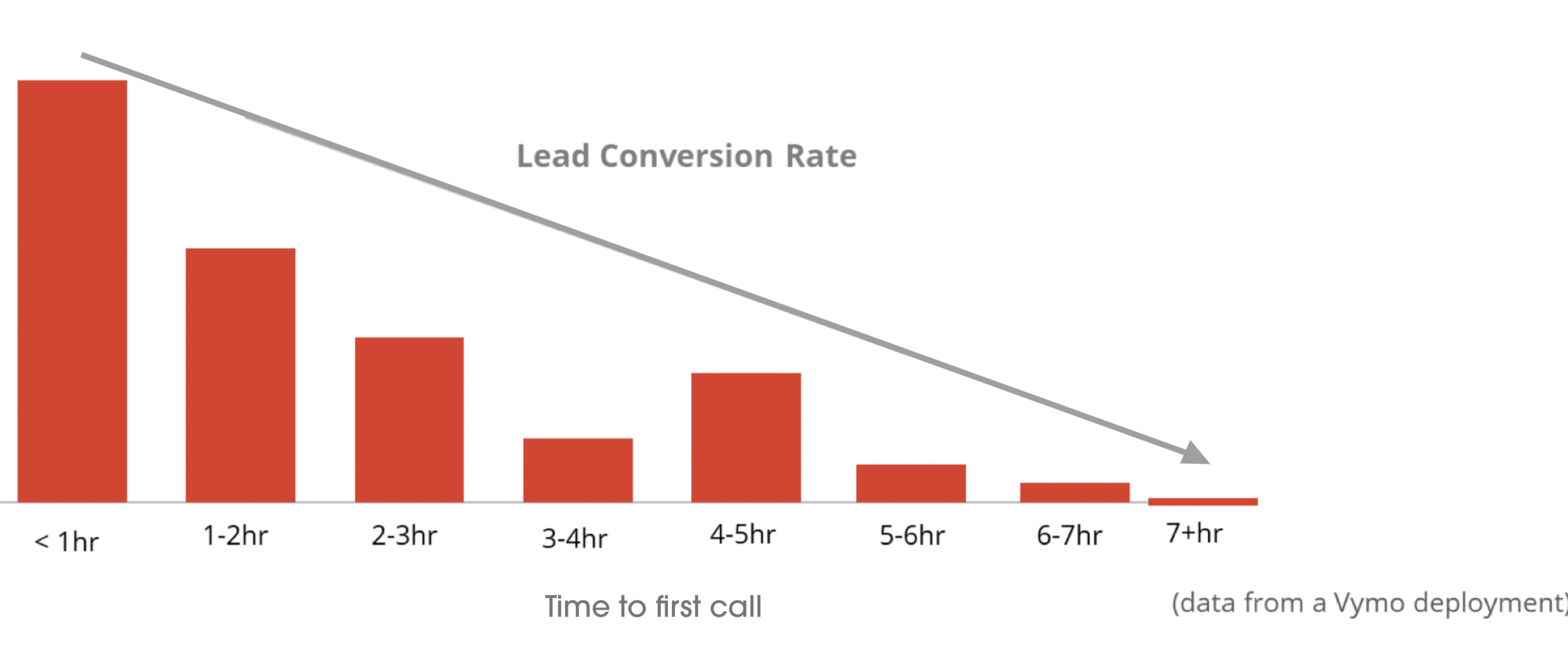


Vymo's data science team can run periodic exercises to evaluate the effectiveness of the allocation algorithm and suggest enhancements

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

Gartner Cool Vendor

"Vymo should be of interest to application leaders that need to make a step change in sales productivity."

Microsoft 'AI for All Award

"Vymo is fundamentally changing how financial services work."

- Satya Nadella

CB Insights Demo day Winner

"Vymo was our judges favourite in the Fintech category."

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



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