Round Robin Implementation

Many organizations with sales teams struggle with the fair and equitable distribution of new Leads. This can result in overloading some sales reps, while others can feel left out. The Round Robin model, typically for sales, assigns incoming Lead records to the next representative on your sales team, in order.

At Forceworks we developed IP to handle Automated Round Robin Distribution. Since every organization is different, we do not offer this IP without our Implementation Assistance.

This one-day consulting service offer is for the basic implementation of our Round Robin Solution. A Basic implementation would include: On creation of a new Lead, a workflow automatically assigns that Lead to the next eligible representative and alerts the representative.

We can also assist with much more complex implementations, including distinct teams for multiple product lines and territories. Our solution is not limited to Sales scenarios, we also utilize Round Robin for Service requirements, or custom scenarios. Any scenario that requires record assignment to the next eligible representative can be achieved.

Deliverables

What does this Basic Implementation Service include?

- Phone call to review your Round Robin requirements.
- Installation of our I.P. on your target organization.
- Perform Configuration to meet agreed requirements.
- Maximum of 8 Hours.

Exclusions

What is not included in this Basic Implementation Service?

- ALM Related Processes

This Consulting Service is offered by Forceworks Global. Led by a Microsoft Business Applications MVP, Forceworks is a recognized global leader for Microsoft's Power Platform.

* Note: In addition to the implementation cost, there is a monthly cost, per organization for Forceworks' Round Robin I.P. of $250 USD.

FORCEWORKS ⚙ GLOBAL

LEADS

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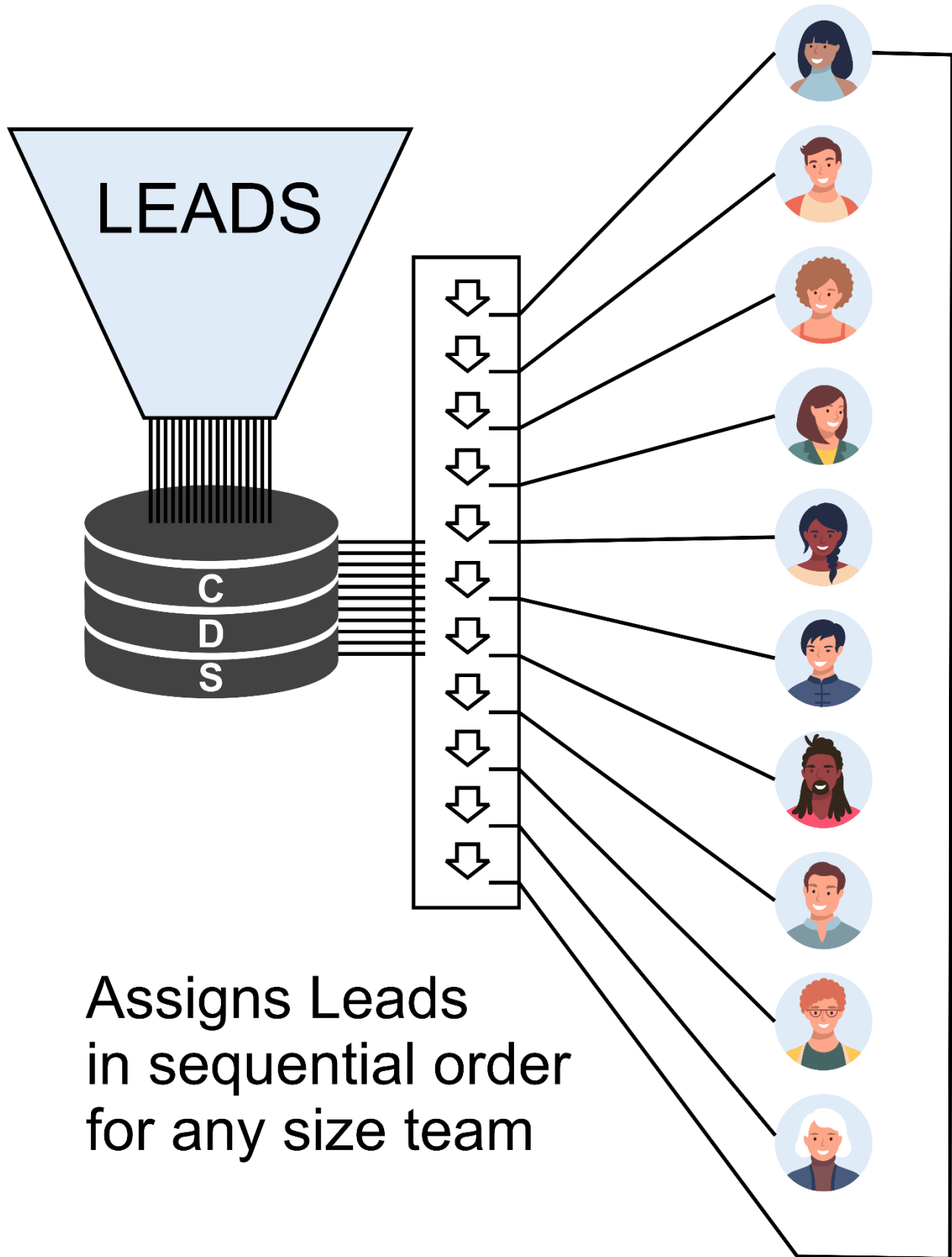
Assigns Leads
in sequential order
for any size team