

CASE STUDY

ROUND ROBIN LEAD ASSIGNMENT

PROBLEM:

Lead assignment to sales reps in round robin fashion where leads are grouped on certain criteria. Lead distribution should be even for all the reps. No rep should be overburden with large number of leads to handle.

APPROACH:

- Create a Sales Rep search in a way that it shows the Total Escalations assigned to that each Rep and sort that by Ascending Order (So the Rep with the lowest number of assigned Customers is at the top of search)
- Create a script that loops through the Customer list (saved search) which needs assignment.
- For each iteration, run the search created in step 1 and then assign the first Rep of the returned results to the current customer.
- Running the search for each iteration is time & governance consuming and hence, this type of solution is applied to Scheduled/Map-Reduce scripts where we can yield our script (or it is automatically yielded in case of M/R script) before we run out of governance and time limits.
- The result would be that all the customers will be assigned Sales Rep in a round robin fashion and the distribution will be such that all Sales Rep will have nearly equal distribution of customers.

SOLUTION:

- A saved search was created which will have the Sales Reps and their total assigned escalations.
- A Map/Reduce script was created with Input as the result set of the Customers, to which we need to assign the escalation managers.
- Then in the reduce stage, we would run the search we created on Sales Rep with their total escalations and get the first result of the search and assign that to each customer. (This works only if the result is sorted by the total number of escalations in ascending order).

GOAL ACHIEVED:

- Round Robin technique was successfully applied to resolve the even distribution of customers among Sales Rep.
- Using the round robin assignments many other random assignments have also been made possible which work for different scenarios where one thing needs to be distributed evenly among another set of things.

