AI Automation / CRM Automation

Analyze lead attributes (industry, company size, behavior) and assign to correct sales rep or team — turns chaos into structure.
Difficulty: Intermediate
Model: GPT-4 / Claude / Gemini
Use Case: Lead Routing, Sales Assignment
Updated: May 2026
Why This Prompt Exists
Leads arrive from multiple channels — forms, chat, email, events — and go nowhere because no one knows who should get them. Routing is the first failure point in most CRMs.

You get:

- leads sitting unassigned for days (opportunity decay)
- territory mismatches (sales rep in wrong region)
- skill mismatches (enterprise lead goes to SMB rep)
- round-robin failures (one rep gets overloaded)
- no routing audit trail (can’t debug assignment issues)

But routing can be systematic:

- territory-based: region, timezone, language
- industry-based: vertical expertise (healthcare, fintech, retail)
- size-based: enterprise vs. mid-market vs. SMB
- behavior-based: lead score, intent signals, page visits
- availability-based: workload, capacity, PTO

Without classification, leads fall through cracks.

This prompt designs lead routing rules that scale.

The Prompt

```
Assume the role of a RevOps architect who designs lead routing
systems.

Your task is to create classification and routing rules for incoming
leads.

Generate:

1. LEAD ATTRIBUTES TO CLASSIFY
   - Source: [form / chat / email / event / referral]
   - Industry: [list of relevant industries]
   - Company size: [employee range or revenue]
   - Geographic region: [country, state, timezone]
   - Lead score: [numeric or tier]

2. ROUTING DIMENSIONS

| Dimension | Values | Matching Logic |
|-----------|--------|----------------|
| Territory | [list of regions] | Exact match or nearest |
| Industry | [list] | Exact match |
| Size | [SMB/Mid-Market/Enterprise] | Range match |
| Language | [en/es/fr/de] | Exact match |

3. ROUTING RULES (priority order)
```

Priority	Condition	Assign To	Fallback
1	Industry = Healthcare AND Size = Enterprise	Healthcare team lead	Enterprise team
2	Region = EMEA AND Language = German	DACH specialist	EMEA team
3	Lead score > 80	Top-performing rep (round-robin)	Any available

4. LOAD BALANCING
   - Algorithm: [Round-robin / Least-loaded / Weighted]
   - Capacity limit per rep: [X leads/day]
   - Overflow handling: [queue / redistribute / notify manager]

5. ROUTING LOGGING
   - What to log: [lead ID, timestamp, assigned rep, rule triggered]
   - Why: [audit, debugging, performance analysis]

6. EXCEPTION HANDLING
   - What if no rule matches? [Unassigned queue / default rep / manager review]
   - What if assigned rep is unavailable? [Next rep / requeue / escalate]

INPUTS:

Sales team structure:
[E.G., "10 reps: 3 enterprise (healthcare, fintech, general), 5 mid-market (regional), 2 SMB (volume)"]

```
Lead volume by source:
[E.G., "500 leads/week: 200 from forms, 150 from chat, 100 from
events, 50 from referrals"]

Routing requirements:
[E.G., "Healthcare leads go to healthcare team. Enterprise leads above
$50k ACV go to VP."]

RULES:
- Route by expertise first (enterprise leads to enterprise reps, not
generalists)
- Route by territory second (timezone alignment matters for follow-up)
- Route by availability third (don't overload top performers)
- Always log routing decisions (you will need to debug)
- Test routing rules with historical leads before deploying
- Review routing effectiveness monthly (time-to-assign, conversion by
rep)
```

How To Use It

- Route by expertise first — enterprise leads to enterprise reps, industry-specific leads to specialists.
- Route by territory second — timezone alignment matters for follow-up speed.
- Route by availability third — don’t overload top performers at the expense of lead response time.
- Always log routing decisions — you will need to debug misrouted leads.
- Test routing rules with historical leads before deploying.
- Review routing effectiveness monthly (time-to-assign, conversion rate by rep).

Example Input

Sales team structure:
“8 reps: 2 enterprise (healthcare, fintech specialists), 4 mid-market (US East, US West, EMEA, APAC), 2 SMB (volume)”

Lead volume by source:
“1,000 leads/week: 400 web forms, 300 chat, 200 events, 100 referrals”

Routing requirements:
“Healthcare leads >$50k ACV go to healthcare specialist. EMEA leads go to EMEA rep (timezone).”

Why It Works
Most lead routing is manual or simple round-robin — both fail at scale. Manual routing creates delay; round-robin ignores qualification.

This framework improves outcomes by forcing:

- lead attribute classification (what data determines routing?)
- routing dimension specification (territory, industry, size, language)
- priority ordering (most important rules first)
- load balancing design (prevent rep overload)
- exception handling (what falls through the cracks?)

Failure modes this prevents:

- Unassigned leads — sitting in queue for days (lost revenue)
- Territory mismatches — rep in wrong timezone calls at 2 AM
- Expertise mismatches — enterprise rep gets SMB leads (wasted capacity)
- Rep overload — one rep gets 80% of leads (burnout, slow response)

This improves on: Manual assignment (slow) and round-robin (unqualified). Intelligent routing matches leads to the right rep.

Related to: CRM-04 (Intent Tagger) for lead qualification; CRM-06 (Health Score) for prioritizing hot leads.

Build Better AI Systems

Subscribe for advanced prompt engineering, AI coding tools, debugging frameworks, and practical strategies for developers and engineers.

Carefully engineered prompts for people doing real work.

Share this:

- Share on Facebook (Opens in new window) Facebook
- Share on X (Opens in new window) X

See also Customer Health Score Builder