Building a Seamless Customer Journey with Lane Four Highroad

Powering teams to do their best work with AI

Harnessing the power of AI, Capacity is a new kind of helpdesk that empowers teams to automate their support processes. Their harmonious, AI-powered platform allows teams to grow revenue while eliminating costly processes like answering repetitive tickets and emails.

Creating a seamless sales experience

The revenue operations team at Capacity, headed up by RevOps Director Krystal Diel, set out to create a seamless customer journey—for their own sales team and their prospects.

With Salesforce at the center of their revenue operations engine, Capacity had a future vision for a fully automated contact-only assignment model that would run as soon as a new lead hits Salesforce.

"Lane Four Highroad offered everything we needed at an affordable price. It was the obvious choice!"

Krystal Diel
Director of RevOps

The team knew that in order to provide the best experience for both their internal teams and their customers, they needed a fast and dependable way to filter leads from Marketo and get them to the right reps.

Specifically, they needed a routing tool that could easily filter out junk records, connect leads with accounts inside Salesforce, and route filtered leads to the appropriate team member.

Most importantly, Krystal wanted to ensure that existing customers were never mishandled or put into a sales cycle by mistake.

A feature-rich solution at an accessible price

When Capacity was looking for a matching and routing tool, Lane Four Highroad emerged as the best choice due to its robust functionality at an accessible price point for a scaling company. When compared with other options, Lane Four came out on top for both features and pricing.
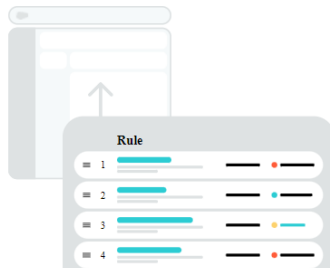
Supporting a contact-only assignment model

- ✅ Lead-to-Account Matching
- ✅ Account-Based Routing
- ✅ Auto-Merge
- ✅ Auto-Account Creation
- ✅ Auto-Conversion

Initially, Capacity's sales team worked with both leads and contacts in Salesforce. But having a duplicate process for two different Salesforce objects caused a lot of problems operationally, including inefficiency and mishandled accounts. The ops team was also burdened by working with two objects, especially when it came to oversight and reporting.

As the company continued to grow, the RevOps team realized that working in multiple objects was no longer sustainable. They needed to switch to a contact-only model to keep up with increased volume and the demands of their go-to-market strategies.

Luckily, Lane Four's flexible feature set and knowledgable support team made the transition to a fully automated contact-only model not only doable, but easy. The Lane Four customer support team worked closely with Krystal to plan, execute, and adjust their account-based vision, supported entirely by automation.

While Capacity implemented core matching and routing functions to filter, sort, and assign their records accurately, the most important feature supporting their contact-only model is auto-account creation. This ensures that all prospects in the system are automatically worked as part of an account, which enables a smoother sales process, and a much simpler reporting process for ops.

Prepared and ready for growth

As a result of their new, more efficient sales model, Capacity is prepared to grow their sales team more than 4x in the coming year. According to Krystal, Lane Four Highroad will also make the onboarding of new reps much simpler:

"Configuring round robins and updating territories in Lane Four is so quick and easy. I know how to set up the rules myself, and this is especially important when bringing on new reps."

Connecting contacts and accounts has given the RevOps team peace of mind. Being able to obtain data from a single source has given them much greater confidence in their data-driven decisions, particularly around account-based strategies.

Meanwhile, the time saved by moving to a single Salesforce object has increased overall efficiency, leading to more time spent with prospects and customers while decreasing lead response times.

A combination of reporting confidence and increased efficiency has helped build a seamless sales experience for all, setting the stage for Capacity to enter a phase of rapid growth. With Highroad anchoring their revenue operations, new reps will be coming into their role in a stable and efficient environment.

"I 'm always confident that Lane Four can do what we need to make our sales team successful."

Krystal Diel, Director of RevOps

About Capacity

Capacity is an AI-powered support automation platform that connects your entire tech stack to answer questions, automate repetitive support tasks, and build solutions to any business challenge.

About Lane Four Highroad

Lane Four Highroad is a lead-to-account matching and routing tool built by Salesforce experts to meet the demands of high-growth companies.