

# Marketo Lead Routing Rules Catalog

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Platform: Marketo | Type: Lead Routing Analysis | Prepared by: RevPal OpsPal

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## Executive Summary

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The Enterprise Software Co Marketo instance has an **ACTIVE lead routing system** via the **OP-Lead Assignment Rules** program located at `Operational > Data Management > Assignment Rules`. This routing system successfully routes business leads to Salesforce with proper owner assignment.

## Key Metrics

- **Total Smart Campaigns:** 197
- **Active Routing Campaigns:** 5 (OP-Lead Assignment Rules)
- **Active Scoring Campaigns:** 7 (behavioral scoring)
- **Inactive Legacy Routing Campaigns:** 30+ (archived historical campaigns)
- **Lead Routing Status:** OPERATIONAL for business leads

## Correction Notice

**Previous Finding (INCORRECT):** The original audit on 2026-01-12 concluded there were "zero active lead routing campaigns."

**Corrected Finding:** Active routing exists via the **OP-Lead Assignment Rules** program. The original audit searched for "Add to Salesforce" campaigns (all archived) and "Funnel Stage" campaigns (inactive), but missed the active Assignment Rules folder under Data Management.

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# Active Lead Assignment Program (OP-Lead Assignment Rules)

Location: [Operational](#) > [Data Management](#) > [Assignment Rules](#) > [OP-Lead Assignment Rules](#)

## Active Campaigns

#	Campaign Name	Status	Function
1	01. Assign Leads	ACTIVE	Primary routing trigger - assigns leads based on criteria
2	02. Match Lead Owner with Account	ACTIVE	Ensures lead owner matches existing account owner
3	03. Notify Reps	ACTIVE	Sends notifications to sales reps on new assignments
4	04. Recycled Lead Assignment	ACTIVE	Handles re-routing of recycled/returned leads
5	05. Round Robin Assignment	ACTIVE	Default routing via round-robin distribution

## Verified Routing Evidence

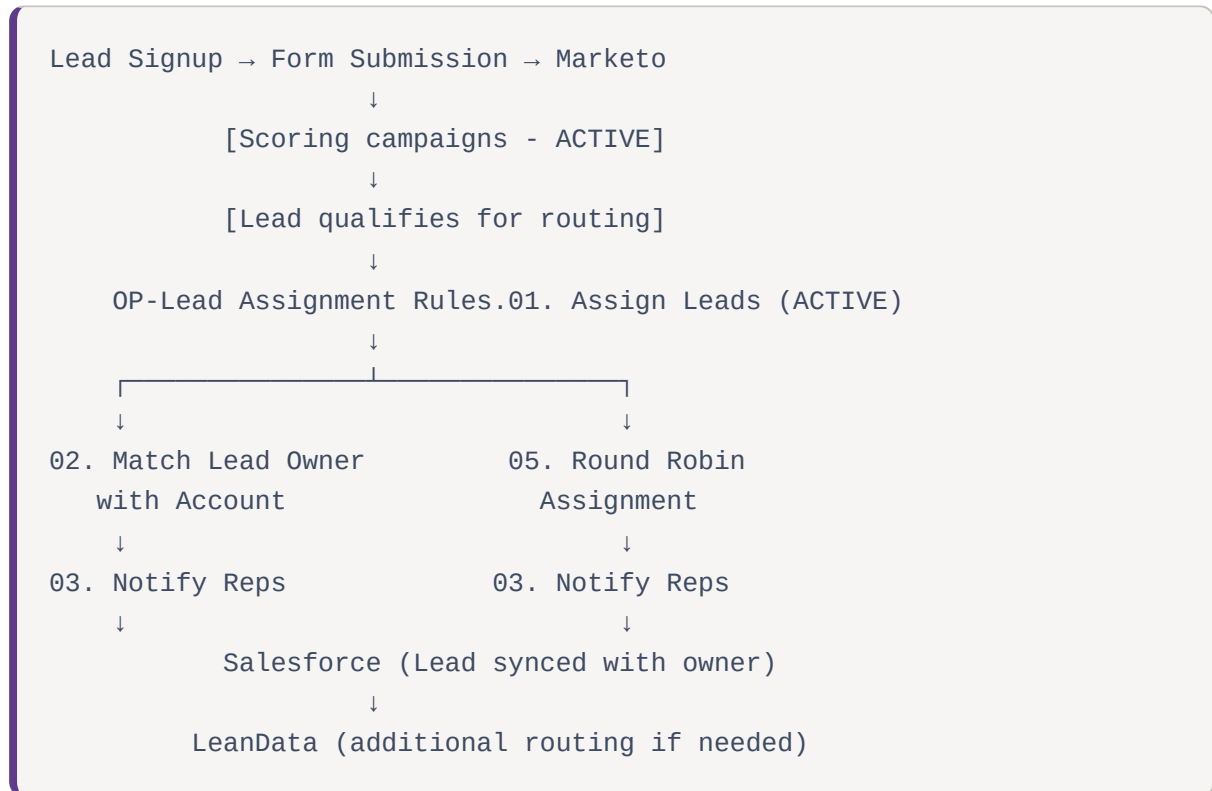
Lead 8777329 (Andy Kucharski) - Successfully routed January 19-20, 2026:

- **Owner Profile:** Changed from "Marketo Sync" to "AE"
- **Sales Person Owner:** Assigned to "Madison Doyle"
- **Assignment Queue:** Set to "SMB"

This demonstrates the active routing system is functioning correctly for business leads.

# Routing Architecture (Corrected)

## Current State: ACTIVE ROUTING VIA OP-LEAD ASSIGNMENT RULES



## Integration Points

System	Integration	Status
Marketo Scoring	Behavioral scoring	✓ ACTIVE
OP-Lead Assignment Rules	Lead routing	✓ ACTIVE
Salesforce	Lead sync & owner assignment	✓ OPERATIONAL
LeanData	Secondary routing in SFDC	✓ Active (supplemental)

## Known Issue: Creator Leads Not Being Routed

**Scope:** This issue affects only a subset of leads - NOT all leads.

## Affected Population

~1,900 US leads with specific characteristics:

- `Company = "[My Company]"` (placeholder company)
- `LeadSource = null`
- `Status = "Open"`

## Root Cause Hypothesis

The **OP-Lead Assignment Rules.01. Assign Leads** campaign likely has smart list criteria that excludes leads with:

- Missing Company name (or placeholder company)
- Null LeadSource

## Investigation Needed

To confirm the root cause:

1. Review smart list criteria for "01. Assign Leads" campaign
2. Identify which filters are excluding creator leads
3. Determine if exclusion is intentional or accidental

## Business Leads vs Creator Leads

Lead Type	Company Field	LeadSource	Routing Status
Business Lead	Valid company name	Valid source	✓ Routed successfully
Creator Lead	"[My Company]"	null	✗ Not routed

## Legacy Routing Campaigns (INACTIVE/ARCHIVED)

The following campaigns are historical and no longer active. They were replaced by the OP-Lead Assignment Rules system.

## 1. SFDC Lead Sync Campaigns (All INACTIVE)

These campaigns were designed to sync qualified leads from Marketo to Salesforce. All have been archived and replaced by the current assignment rules system.

Campaign ID	Campaign Name	Type	Status	Last Updated	Location
1066	Send Autoresponder + Add to Salesforce	Trigger	Inactive	2019-2023	Archive
1069	Add to Salesforce	Trigger	Inactive	2022	Archive PPC
1072	Add to Salesforce	Trigger	Inactive	2020	Archive
1078	Send Autoresponder + Add to Salesforce	Trigger	Inactive	2020	Archive
1081	Send Autoresponder + Add to Salesforce	Trigger	Inactive	2020	Archive
1082	Send Autoresponder + Add to Salesforce	Trigger	Inactive	2020	Archive
1084	Send Autoresponder + Add to Salesforce + Nurture	Trigger	Inactive	2020	Archive
1087	Send Autoresponder + Add to Salesforce	Trigger	Inactive	2020	Archive
1092	Send Autoresponder + Add to Salesforce + Nurture	Trigger	Inactive	2020	Archive

1094	Send Autoresponder + Add to Salesforce	Trigger	Inactive	2020	Archive
1097	Send Autoresponder + Add to Salesforce + Nurture	Trigger	Inactive	2020	Archive
1099	Add to Salesforce	Trigger	Inactive	2020	Archive
1106	Add to Salesforce + Start Course	Trigger	Inactive	2021	Archive
1122	Add to Salesforce	Trigger	Inactive	2022	Archive
1123	Add to Salesforce	Trigger	Inactive	2022	Archive
1137	Add to Salesforce	Trigger	Inactive	2022	Archive
1206	Add to Salesforce	Trigger	Inactive	2022	Archive
1208	Add to Salesforce	Trigger	Inactive	2022	Archive
1212	Add to Salesforce	Trigger	Inactive	2022	Archive
1213	Add to Salesforce	Trigger	Inactive	2022	Archive
1220	Add to Salesforce	Trigger	Inactive	2022	Archive
1222	Add to Salesforce	Trigger	Inactive	2022	Archive

1224	Add to Salesforce	Trigger	Inactive	2022	Archive
1232	Add to Salesforce	Trigger	Inactive	2022	Archive

**Total:** 23 "Add to Salesforce" campaigns - all inactive (superseded by OP-Lead Assignment Rules)

## 2. Lead Funnel/Lifecycle Campaigns (All INACTIVE)

These campaigns manage lead qualification stages and MQL transitions.

Campaign ID	Campaign Name	Type	Status	Last Updated	Location
1090	01. Funnel Stage = Engaged	Batch	Inactive	2023-10-10	Archive/Life cycle 2022
1091	02. Funnel Stage = MQL	Batch	Inactive	2023-10-10	Archive/Life cycle 2022

**Total:** 2 funnel stage campaigns - both inactive

## 3. SFDC Campaign/Task Campaigns (All INACTIVE)

Historical routing campaigns that created Salesforce objects for lead management.

Campaign ID	Campaign Name	Type	Status	Last Updated	Location
1098	[UPDATE POST LAUNCH] Create Salesforce Task	Trigger	Inactive	2019-2023	Archive
1144	Run Action Sync Person to SFDC 2019-05-28	Batch	Inactive	2019	Archive
1151	Send Autoresponder + Add to Salesforce + Nurture	Trigger	Inactive	2020	Archive
1214	Send Autoresponder + Add to Salesforce + Nurture	Trigger	Inactive	2020	Archive
1223	Send Autoresponder + Add to Salesforce + Nurture	Trigger	Inactive	2020	Archive
1226	Add to Salesforce	Batch	Inactive	2021	Archive
1228	Run Action Add to SFDC Campaign 2019-07-22	Batch	Inactive	2019	Archive

**Total:** 7 SFDC object creation campaigns - all inactive

## Active Scoring Campaigns (NOT Routing)

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Currently active campaigns in the instance that handle behavioral scoring. These complement the routing system but do not handle routing directly.

Campaign ID	Campaign Name	Type	Status	Location	Purpose
1048	41 - P2 Form	Trigger	Active	/Marketing Activities/Default/Operational/OP-Scoring/Behavior/	Form submission scoring
1049	Demo Booking- Call Booked	Trigger	Active	/Marketing Activities/Default/Operational/OP-Scoring/Behavior/	Demo booking scoring
1054	62 - Page View Low-Value	Trigger	Active	/Marketing Activities/Default/Operational/OP-Scoring/Behavior/	Low-value page view scoring
1055	61 - Page View Medium-Value	Trigger	Active	/Marketing Activities/Default/Operational/OP-Scoring/Behavior/	Medium-value page view scoring

1057	60 - Page View High-Value	Trigger	Active	/Marketing Activities/Default/Operational/OP-Scoring/Behavior/	High-value page view scoring
1119	Middle of Funnel (MOFU)	Trigger	Active	/Marketing Activities/Default/Operational/	Nurture engagement
1120	Bottom of Funnel (BOFU)	Trigger	Active	/Marketing Activities/Default/Operational/	Nurture engagement

**Total:** 7 active campaigns - focused on **scoring and nurture**

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## Routing-Related Custom Fields in Marketo

Field API Name	Display Name	Data Type	Purpose	Status
LeadStatus	Lead Status	Text	Lead lifecycle status (Open, Won, etc.)	Actively used in scoring
Funnel_Stage__c	Funnel Stage	Picklist	Marketing funnel position	Used by OP-Lead Assignment Rules
Assignment_Queue__c	Assignment Queue	Picklist	Sales assignment queue (SMB, Enterprise, etc.)	<input checked="" type="checkbox"/> Actively managed by routing
MQL_Date__c	MQL Date	DateTime	Date lead became MQL	Used in routing criteria
MQL_Category__c	MQL Category	Text	Type of MQL (sales, partner, etc.)	Used in routing criteria
LeanData__Routing_Status__c	LeanData Routing Status	Text	External routing tool status	Managed by LeanData in SFDC
LeanData__Status_Info__c	LeanData Status Info	Text	Additional routing info	Managed by LeanData in SFDC
sfdcLeadOwnerId	SFDC Lead Owner Id	Text	Salesforce lead owner assignment	<input checked="" type="checkbox"/> Set by routing campaigns


# Summary: Routing Rules by Function

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## 1. Lead Assignment (5 ACTIVE)

- **Function:** Route and assign leads to sales owners
- **Program:** OP-Lead Assignment Rules
- **Campaigns:** 5 total (all ACTIVE)
- **Status:**  OPERATIONAL
- **Evidence:** Lead 8777329 routed successfully Jan 19-20, 2026

## 2. Lead Scoring (7 ACTIVE)

- **Function:** Score leads based on behavior
- **Location:** OP-Scoring/Behavior
- **Campaigns:** 7 total (all ACTIVE)
- **Status:**  OPERATIONAL

## 3. Lead Synchronization (0 ACTIVE - Legacy)

- **Function:** Historical sync campaigns (replaced by assignment rules)
- **Campaigns:** 23 total (all INACTIVE)
- **Status:** ARCHIVED - superseded by OP-Lead Assignment Rules

## 4. Lead Qualification (0 ACTIVE - Legacy)

- **Function:** Historical MQL qualification (may be handled in assignment rules)
- **Campaigns:** 2 total (both INACTIVE)
- **Status:** ARCHIVED

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## Active AE Roster (as of 2026-02-06)

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Based on SFDC query of recent lead assignments, 7 AEs are currently in the round-robin rotation:

AE Name	SFDC User ID	Email	In Routing?
Sales Rep A	005XXXXXXXXXX X01	rep@example-corp.com	Yes
Sales Rep B	005XXXXXXXXXX X02M	rep@example-corp.com	Yes
Sales Rep C	005XXXXXXXXXX X03L	rep@example-corp.com	Yes
<b>Sales Rep D</b>	005XXXXXXXXXX X022	rep@example-corp.com	<b>PENDING</b> (TICKET-XXX)
Sales Rep E	005XXXXXXXXXX X02Q	rep@example-corp.com	Yes
Madison Doyle	005XXXXXXXXXX X01	rep@example-corp.com	Yes
Shawn Silverstein	00536000008NLP MAAW	rep@example-corp.com	Yes
William Padilla	005XXXXXXXXXX X02S	rep@example-corp.com	Yes
Sales Rep F	005XXXXXXXXXX X02E	rep@example-corp.com	Yes

## Active Queue Values

Queue	Usage	Notes
<b>SMB</b>	~90% of leads	Primary queue, most AEs route here
<b>MM</b>	~10% of leads	Mid-Market queue

## API Limitation Note (2026-02-06)

The Marketo REST API **does NOT** expose smart campaign flow steps. The AE round-robin configuration (choice steps, rotation sequence) can only be viewed and modified via the

Marketo UI. This was confirmed across 3 separate API investigations using `campaign_get` , `campaign_get_smart_list` , and `smartCampaign` endpoints.

The campaigns in the OP-Lead Assignment Rules program do not appear in standard API campaign lists, likely because they are in an operational folder with restricted API visibility.

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## Recommendations

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### Immediate (Complete)

- ~~Identify active lead routing mechanism~~  DONE - OP-Lead Assignment Rules

### In Progress (TICKET-XXX)

- **Add Sales Rep D to lead router** - PO request from Yao & Arie (2026-02-06)
  - Same rules as Sales Rep F
  - Requires Marketo UI access to modify Campaign 05 flow steps
  - Implementation plan: `JACOB_DOTY_ROUTING_SETUP_PLAN.md`

### Next Steps (Creator Leads Investigation - OUT OF SCOPE)

If creator lead routing is needed, future investigation should:

1. Review smart list criteria for "01. Assign Leads" campaign
  2. Identify filters excluding creator leads (Company, LeadSource)
  3. Decide: Include creator leads in routing OR create separate handling
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# Audit Trail

Date	Audit Type	Finding	Evidence
2026-01-12	Automation Audit	0 active routing campaigns (INCORRECT)	Searched archived campaigns only
2026-01-20	User Verification	Active routing via OP-Lead Assignment Rules	Screenshots of successful routing
2026-01-20	Catalog Correction	5 active routing campaigns confirmed	Lead 8777329 routed to Madison Doyle
2026-02-06	Routing Discovery	7 AEs in active rotation, 2 queues (SMB, MM)	SFDC query of 20 recent leads
2026-02-06	API Investigation	Marketo REST API cannot expose flow steps	3 agent investigations confirmed
2026-02-06	TICKET-XXX Started	Adding Sales Rep D to lead router (PO)	Yao & Arie request, same rules as Zak

## Files Related to This Catalog

- **Quick Reference:** `/instances/marketo/enterprise-software-co/reports/ROUTING-CATALOG-QUICK-REFERENCE.md`
- **Structured Data:** `/instances/marketo/enterprise-software-co/reports/routing-campaigns-structured.json`
- **Runbook:** `/instances/marketo/enterprise-software-co/RUNBOOK.md`
- **Observation Data:** `/instances/marketo/enterprise-software-co/observations/20260120_lead_routing_audit.json`

**Catalog Generated:** 2026-01-20 **Last Corrected:** 2026-01-20 **Data Source:** Marketo  
Automation Auditor + User Verification **Status:** Lead routing is OPERATIONAL for business  
leads