Web-to-Lead Playbook

A practical checklist for secure, scalable intake in Salesforce

- Reduce duplicates and misrouted submissions
- Improve response time with predictable routing and SLAs
- Keep data clean, reportable, and governed as volume grows

What’s inside: Lifecycle framework, routing decision table template, spam-prevention checklist, and metrics to monitor.

Use this as a quick reference while designing or auditing your Web-to-Lead (and beyond) intake.

1) Intake Lifecycle Framework

Start with outcomes, not fields. Treat intake as a lifecycle that teams can operate and measure.

Stage	What “good” looks like
Submission	
Triage & Validation	Run spam checks, validate required contact method, and normalize key fields.
Duplicate Check	Decide: update existing record or create a new Lead (and log activity).
Assignment	Route to owner/queue using Rules or Flow; apply priority and SLA.
First Touch	Create a task/email action with due date; track time-to-first-touch.
Outcome	Qualified, nurture, or disqualify; keep reason codes structured for reporting.
Reporting	Monitor conversion, backlog, spam rate, duplicates, and broken routing signals.

Quick checklist (before launch)

- Define the business owner and response SLA (who, when, how).
- Keep the first form short (5–8 fields) and use progressive profiling later.
- Standardize key fields with picklists (topic, region, program, source).
- Capture attribution via hidden fields (campaign/source/content).
- Decide duplicate behavior up front (update vs create; activity logging).

2) Routing Decision Table Template

Keep routing predictable and maintainable. Document logic as a simple decision table so teams can audit and evolve it.

Condition	Assigned owner/queue	Priority	SLA	Notes
Region = EMEA	EMEA Queue	Normal	1 business day	
Region = US	US Queue	Normal	1 business day	
Source = Partner	Partner Queue	High	4 hours	
Topic = Support	Support Queue	High	4 hours	
Default	General Intake Queue	Normal	1 business day	

Implementation tips

- Choose one primary routing mechanism (Assignment Rules, Flow, or queue triage) to avoid “logic in three places.”
- Make routing visible: dashboard for queue backlog and time-to-first-touch.
- Add a “routing reason” field or logged note so owners can understand why they received the record.

3) Spam Prevention & Monitoring

Public forms attract bots. Aim for lightweight controls plus simple monitoring so spam doesn't destroy trust in the channel.

Control	What it does	Notes
CAPTCHA (where appropriate)	Blocks obvious automation	Balance with UX; consider only on high-risk forms.
Honeypot field	Catches many bots silently	Invisible field that humans won't fill.
Rate limiting	Reduces burst spam	By IP / time window; log blocked attempts.
Disposable email filter (optional)	Reduces low-quality leads	Use cautiously to avoid false positives.
Server-side validation	Stops malformed payloads	Validate email/phone and required contact method.

Monitoring framework (weekly)

- Spam rate trend (flagged submissions / total submissions).
- Top sources and spikes by hour/day (campaigns or bot bursts).
- Queue backlog and average time-to-first-touch.
- Duplicate rate and top duplicate patterns (email, phone, company).
- Submission-to-qualified conversion by source and topic.

When Web-to-Lead isn·t enough

If your requirements include multi-step flows, conditional logic, file uploads, e-signatures, payments, or multi-object creation, basic Web-to-Lead patterns often start to fall short. In these cases, teams typically adopt a more flexible, native Salesforce intake approach. BreezyBit is designed for these scenarios, enabling Salesforce teams to collect data across objects, support richer submission experiences, and maintain governance and data quality as complexity grows.

4) Metrics That Keep the Channel Healthy

Measure what matters beyond “we got submissions.” These metrics drive operational improvements.

Metric	Definition / how to use
Time-to-first-touch	Median hours from submission to first human action; split by queue/team.
Conversion to qualified	Qualified / total; split by source/topic to find high-quality channels.
Duplicate rate	Duplicates / total; track root cause and adjust form + matching rules.
Spam rate	Flagged or blocked / total; watch for spikes after campaigns.
Backlog health	Open tasks/queue age; ensure SLAs are actually met.

Quick templates (copy into your docs)

- **Lifecycle owner: ____________ Primary queue/owner: ____________**
- **SLA:** First touch within ____________ hours; escalation after ____________ hours.
- **Duplicate rule:** If email matches an open Lead within 30 days, update + log activity; otherwise create new.
- **Routing reason logged:** (Region/Topic/Source) ____________

