User Guide:

ConnectAndSell Integrated with SalesLoft - Getting Started for Sales Reps

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1: Getting Started

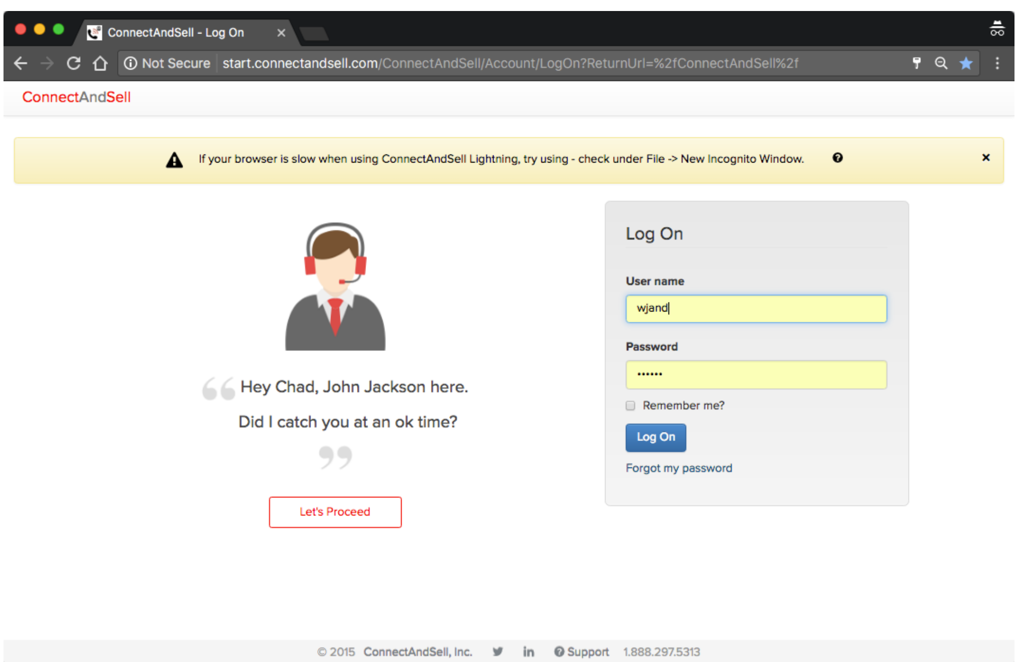
Before you start

It is important to set yourself for success before beginning your ConnectAndSell session. To ensure you have the optimal technical experience it is recommended that you:

- Browser: Use Chrome Incognito – using Chrome Incognito will optimize browser performance. To open a Chrome Incognito, from Chrome click File -> New Incognito Window
- Internet:
  - Use hard wired Ethernet port – if you have access to hard wired Ethernet it will ensure you are using the fastest connection
  - Disable Wi-Fi – in most cases, even if you are using a hard-wired Ethernet port, Wi-Fi is still be your higher priority connection. Disabling Wi-Fi while using ConnectAndSell will ensure you are using the fastest connection

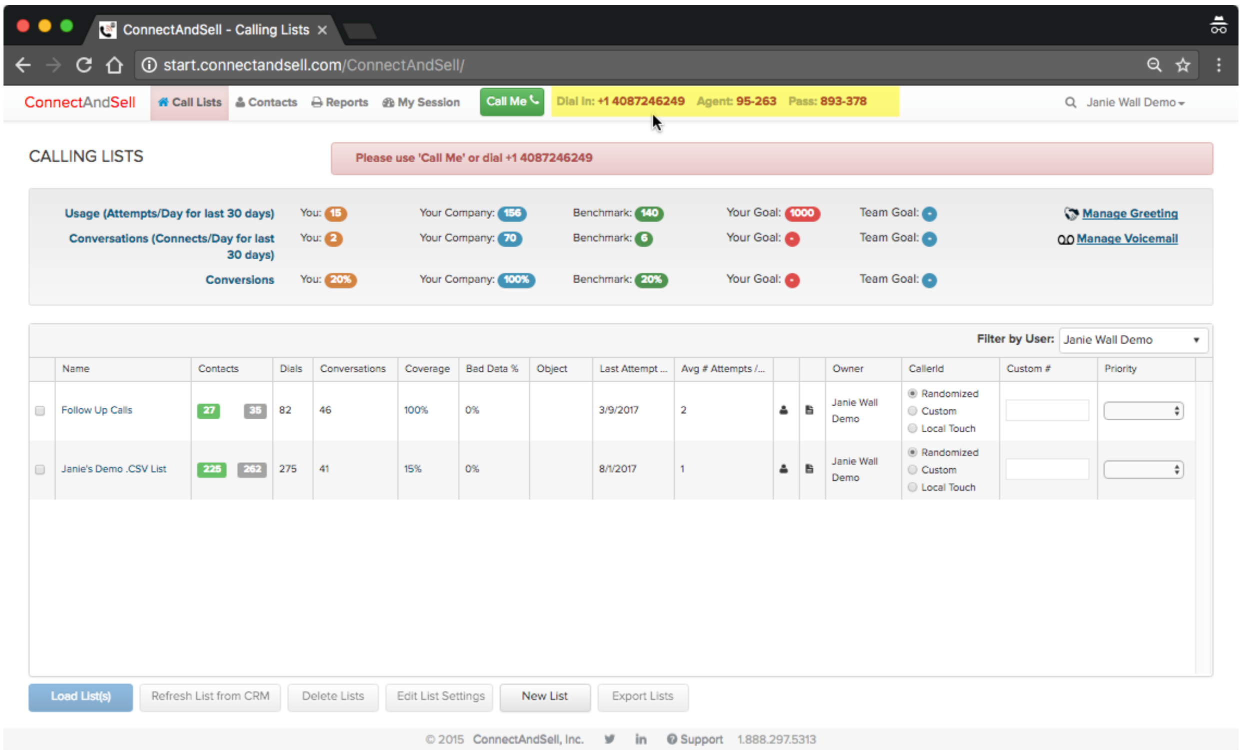
Logging into the application

- Log in to web page: You have received an email from userid@connectandsell.com with your login information. Step 3 is the link to access ConnectAndSell and in Step 2 you will find you login information.
- Click the link, enter your **User name** and **Password** and click **Log On.**



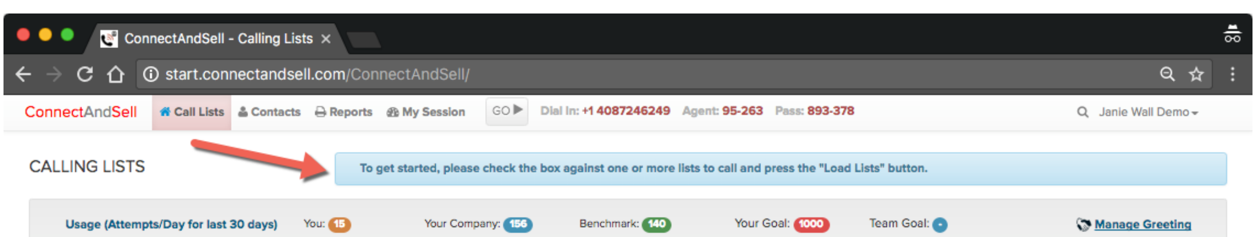
Logging into the phone bridge

While using ConnectAndSell, you will only dial one number; the ConnectAndSell Conference bridge! All calls will be delivered to you on the ConnectAndSell Conference bridge. To connection to the bridge:



- At the top of the page you will find your Dial In number. From your phone (desk phone, mobile or VoIP) dial the number
- You will be prompted to press “1”
- Enter your **Agent** number and **Pass** code

Once you are successfully logged into the ConnectAndSell Conference bridge, the red bar will turn blue in color.



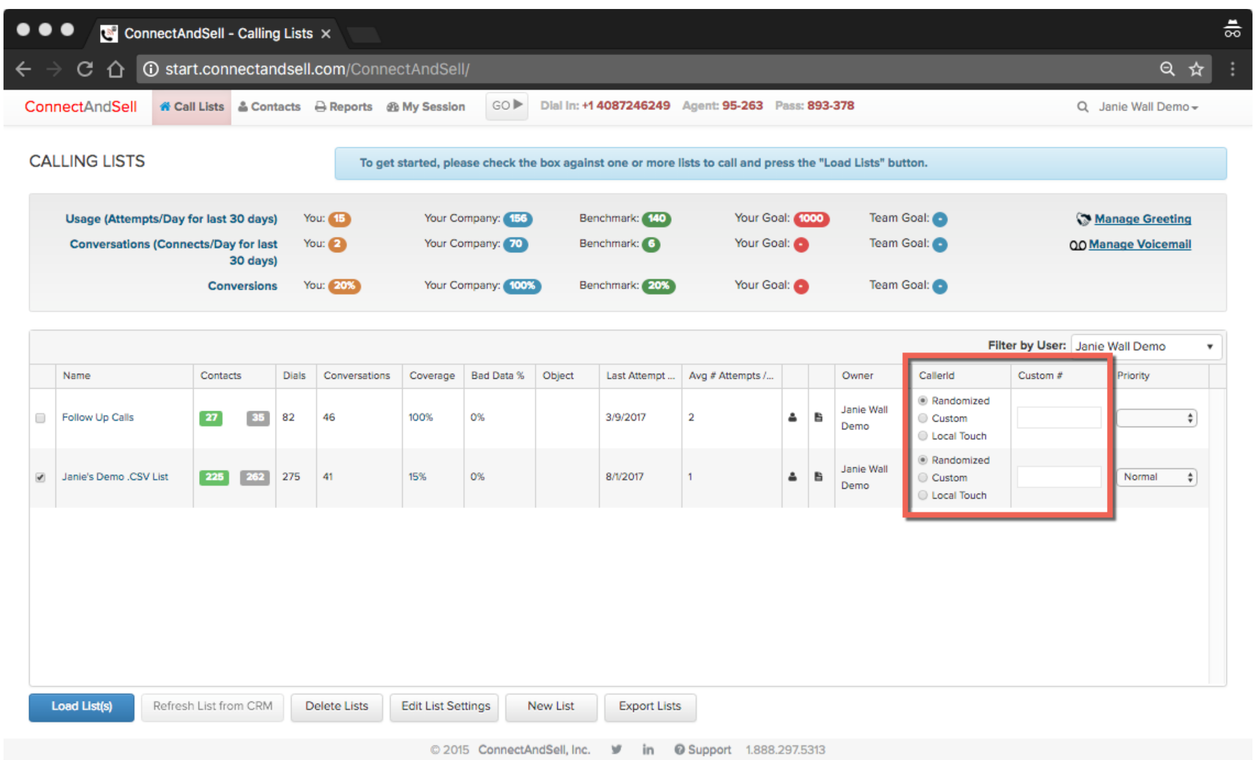
2: Starting a Session

Loading a List

Caller ID

When you are calling prospects using ConnectAndSell, a number will be presented on your prospects caller ID. There are 3 options for you to choose from:

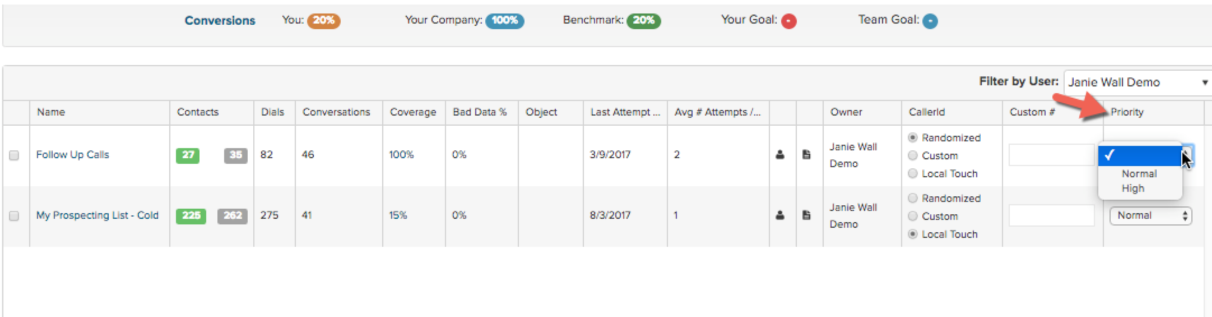
1) Randomized* – the caller ID will be randomized from various North American phone numbers. The numbers are real numbers and if a prospect attempts to call the number back, the phone will ring but not pick up. **This is the default setting and is the recommended setting.**
2) Custom – enter a custom number such as company main line or your direct line. This option should be used strategically. If you select Custom, enter the preferred number to the right in **Custom #**
3) Local Touch – a number that is more local to the prospect will be presented on the Caller ID. This setting is also to be used strategically as you are narrowing the potential caller ID's that are displayed.



Configuring List Priority

You have the ability to set the list priority. In setting the list priority, you prioritize a **Normal** list versus a **High** priority list.

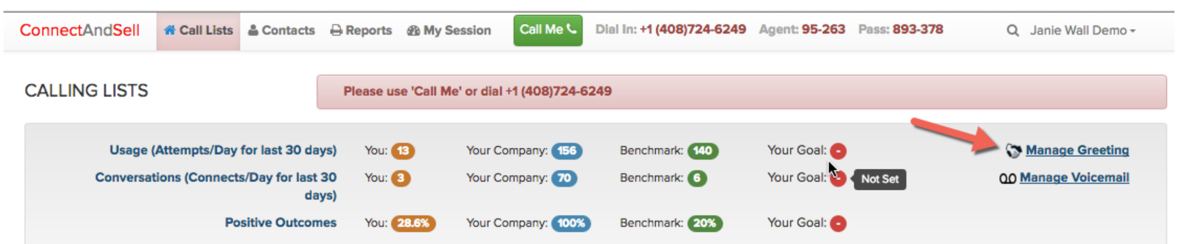
- To set the list priority, to the right of the list name, under Priority, select **Normal** or **High**.



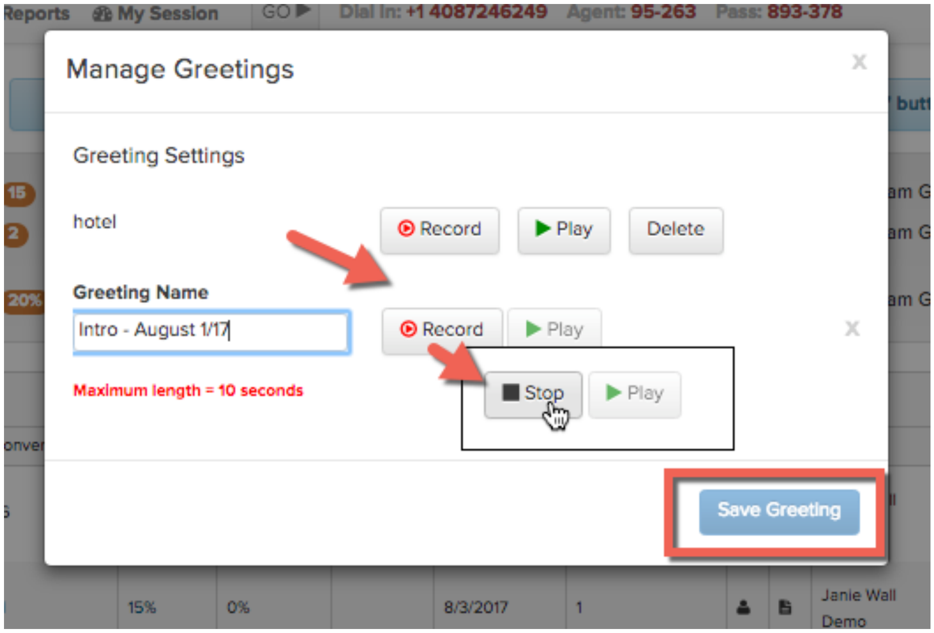
Recording a Greeting

If you choose to use a greeting, you will need to record a greeting before beginning your session.

- Click **Manage Greeting**



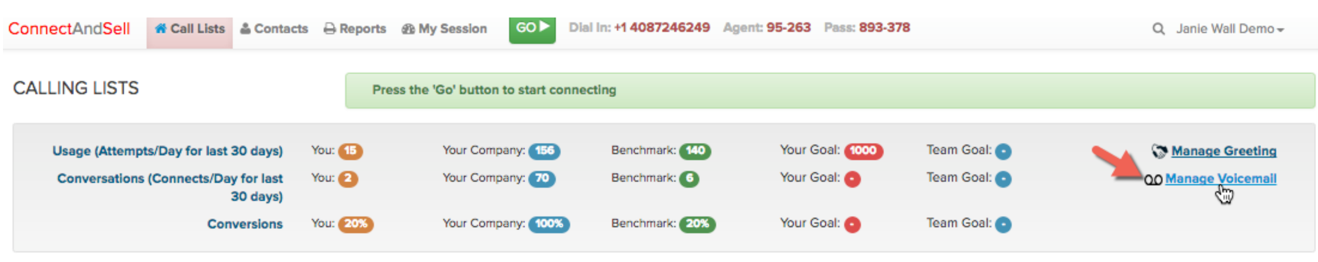
- Click **Add New Greeting**
- Enter a name for the greeting
- Click **Record** to begin recording. Note: Begin speaking as soon as you click the Record button. If you delay, there will be dead air at the beginning of your greeting.
- Click **Stop** when you are done – the Record button toggles to a Stop Button
- Click **Play** to hear what your Greeting sounds like
- Click **Save** when done



Recording a Voicemail

If you choose to use a voicemail, you will need to record a voicemail before beginning your session. Note: When using ConnectAndSell the need to leave voicemails for prospects is greatly reduced because you will get to speak to the prospect! it is not recommended that you use a voicemail for each session, rather meant to be used in a strategic manner.

- Click **Manage Voicemail**

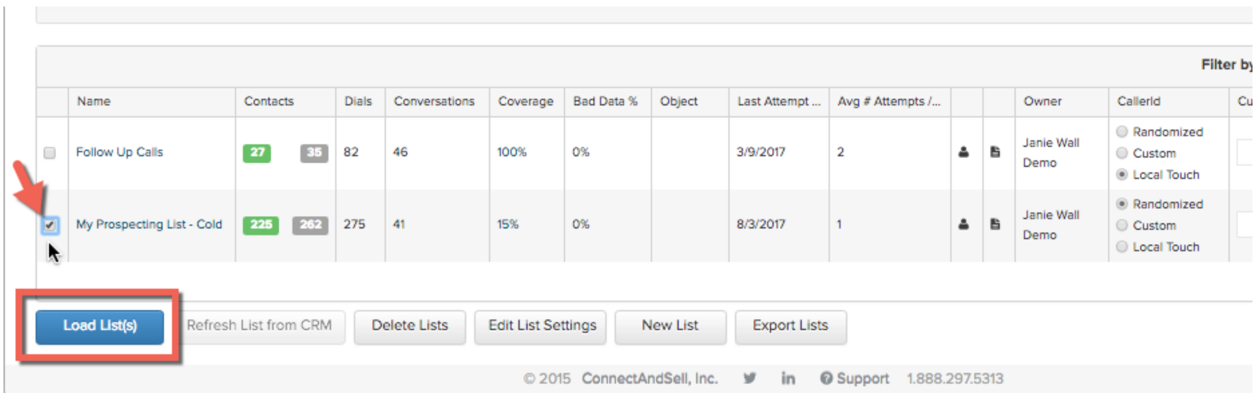


- Click **Add New Voicemail**
- Enter a name for the voicemail
- Click **Record** to begin recording. Note: Begin speaking as soon as you click the Record button. If you delay, there will be dead air at the beginning of your voicemail.
- Click **Stop** when you are done – the Record button toggles to a Stop Button
- Click **Play** to hear what your voicemail sounds like
- Click **Save** when done

Loading the list

When you are ready to load your list into an active session, select the list you want to load. Note that you can select more than one list to load.

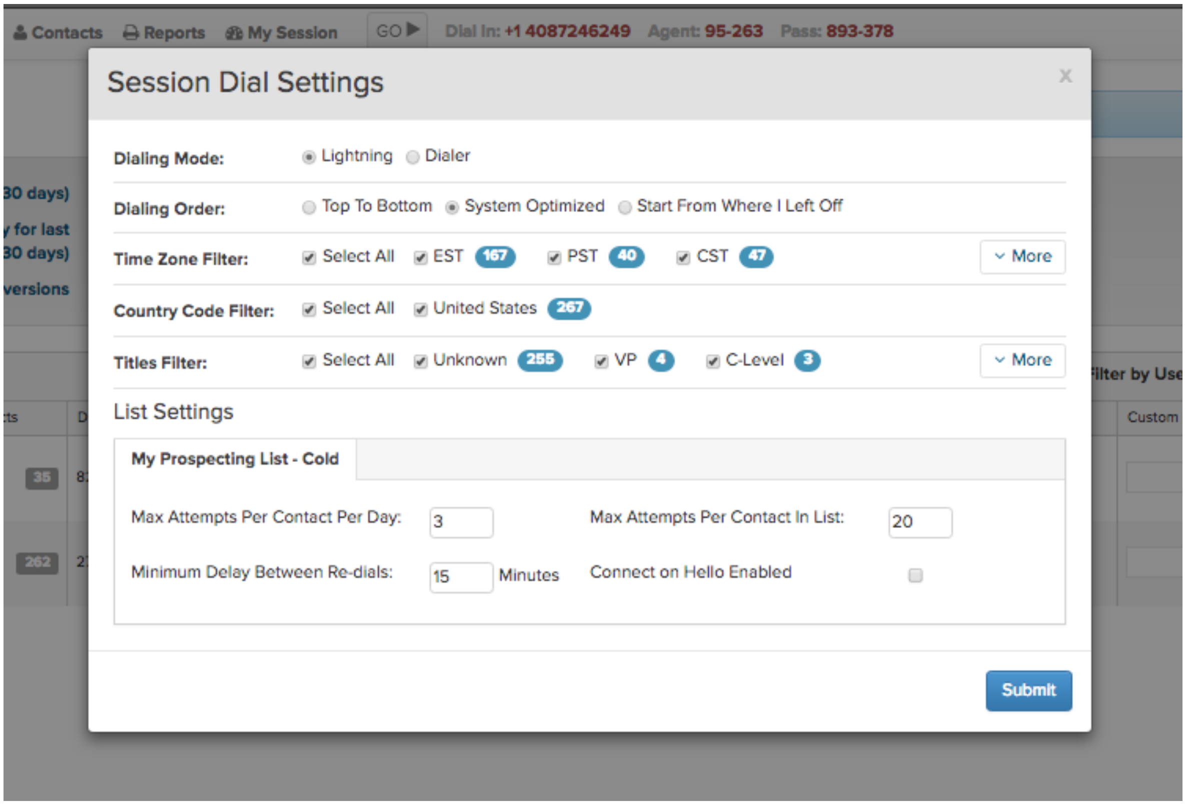
- Select the checkbox(es) to the left of the list name.
- Click **Load List**



Session Settings

Once you have selected the list you will be calling the following settings can be applied:

1) Filters
2) List Settings



Filters

There are 2 filter options:

1) Time Zone Filter – allows you to filter your prospects based on time zone location to ensure you are only loading and calling during the prospects business hours.
2) Country Code Filter – allows you to filter your prospects based on Country location.

List Settings

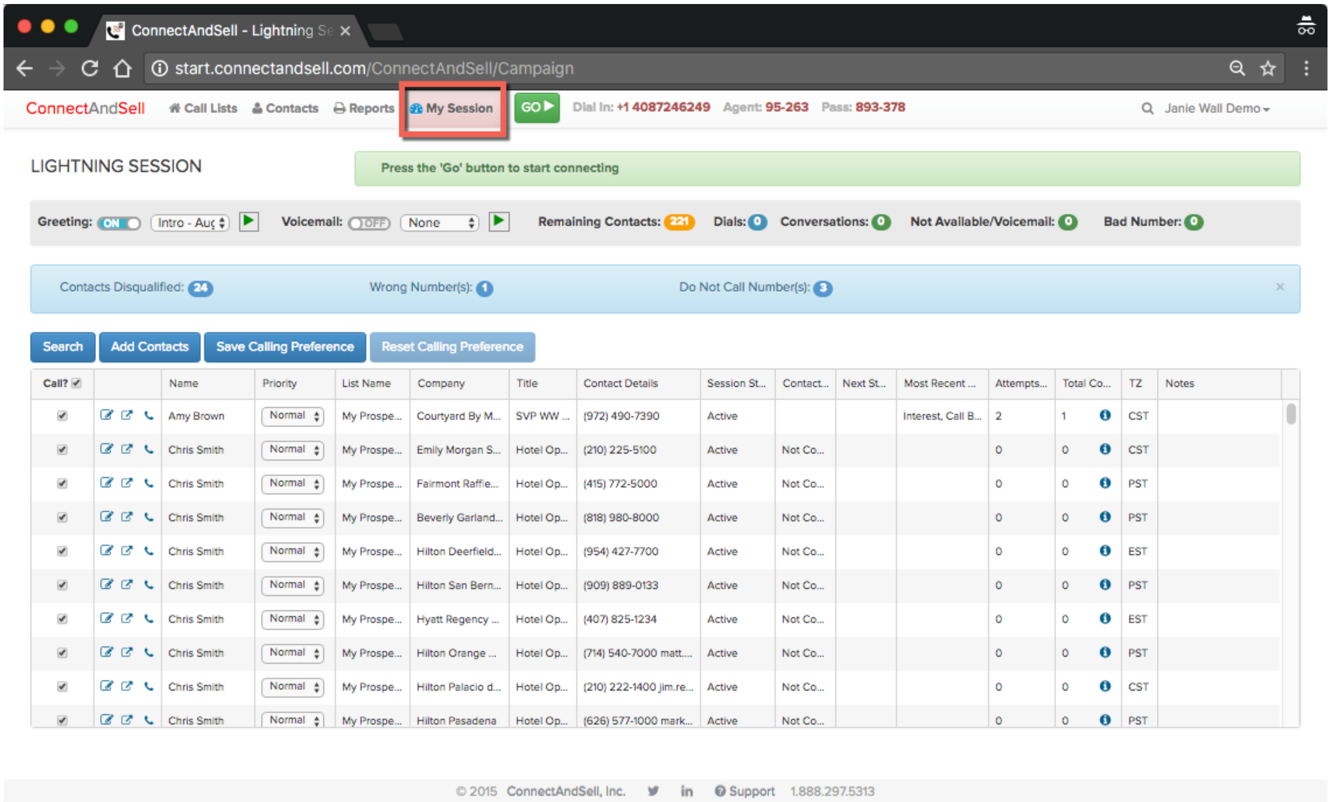
For each list loaded into the session, list settings can be applied to each

- Max Attempts Per Contact in List: limits the amount of times in total a prospect will be attempted

Note: if you have selected multiple lists for your session, you will be able to set the **List Settings** per list

The My Session Page

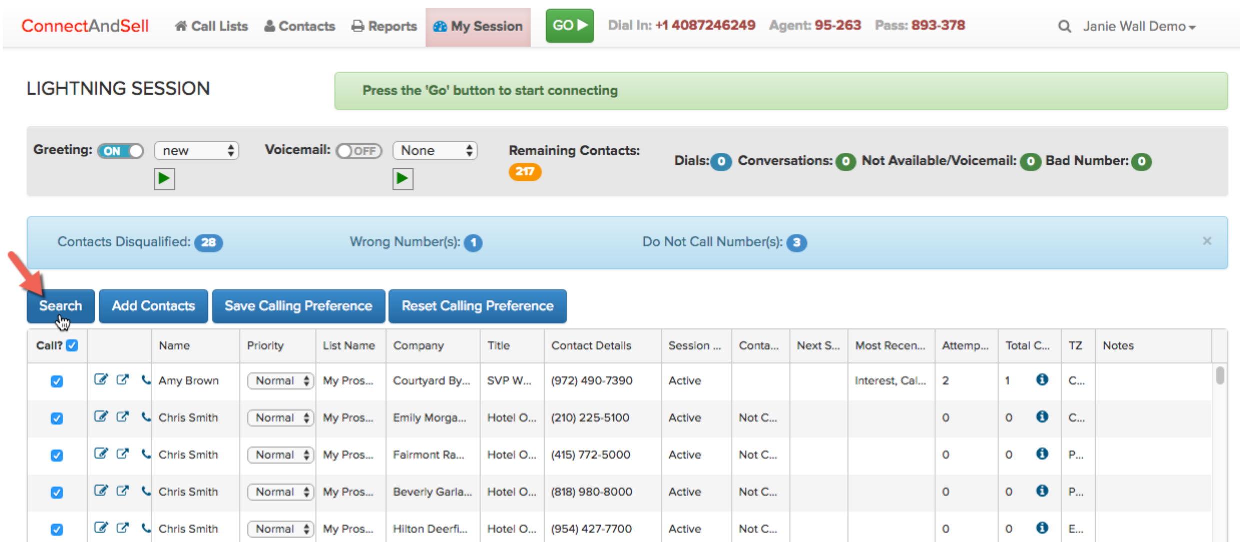
Once a list is loaded, you are working out of the **My Session** page.



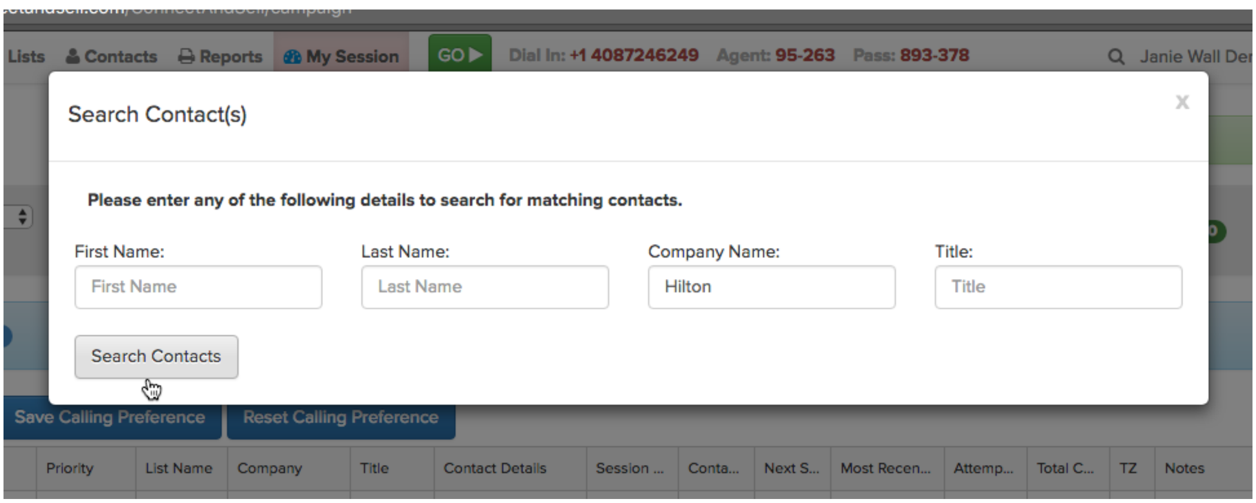
Removing Prospects

Before beginning a ConnectAndSell session, or during a session, you have the ability to remove contacts from your session.

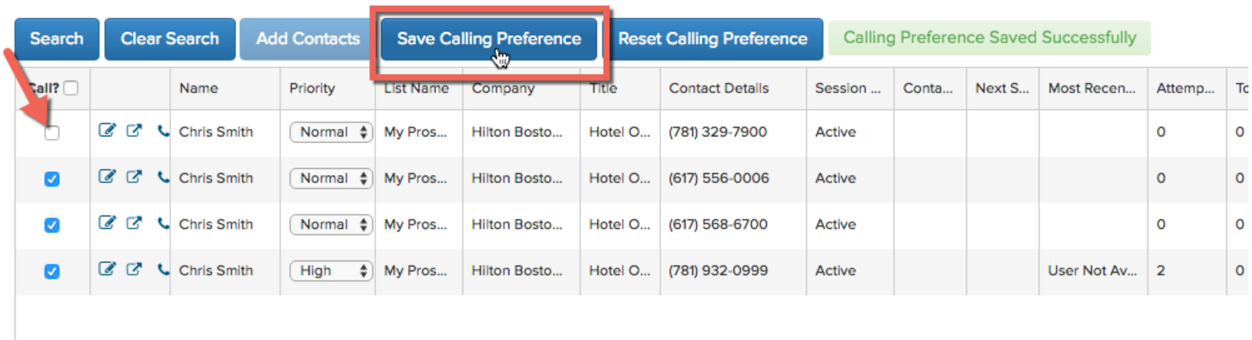
The Search function allows you to search for a First Name, Last Name, Company or Title.



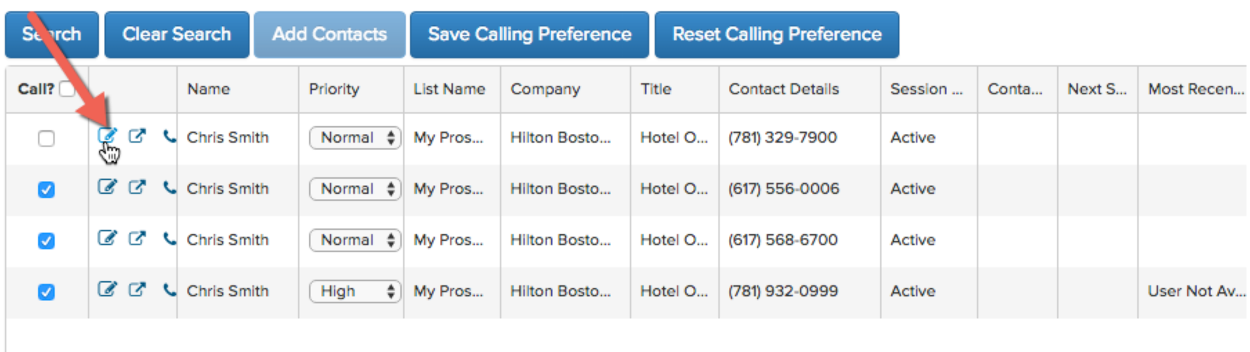
- To begin, click **Search.**
- Enter Search criteria and click **Search Contacts.** Contacts meeting search criteria will appear.

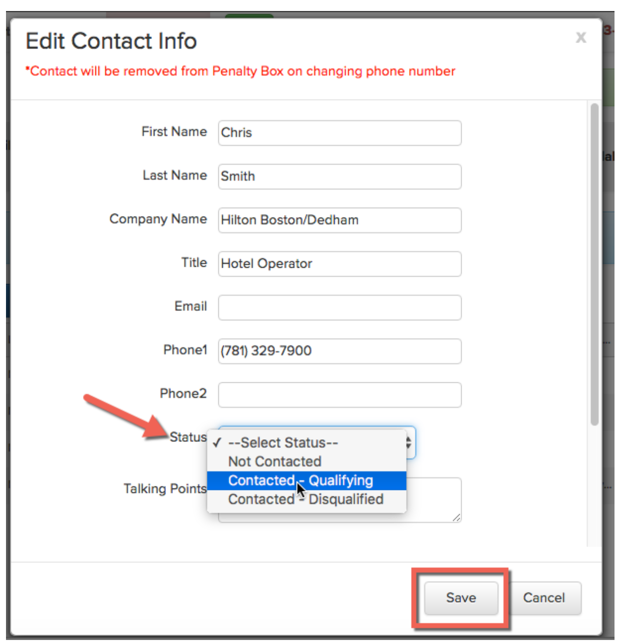


- To remove a contact from a calling session there are 2 options
  - Removing from calling list: to remove prospects from your list of callable prospects, simply de-select the checkbox to the left of the prospects name and clock **Save Calling Preference.**

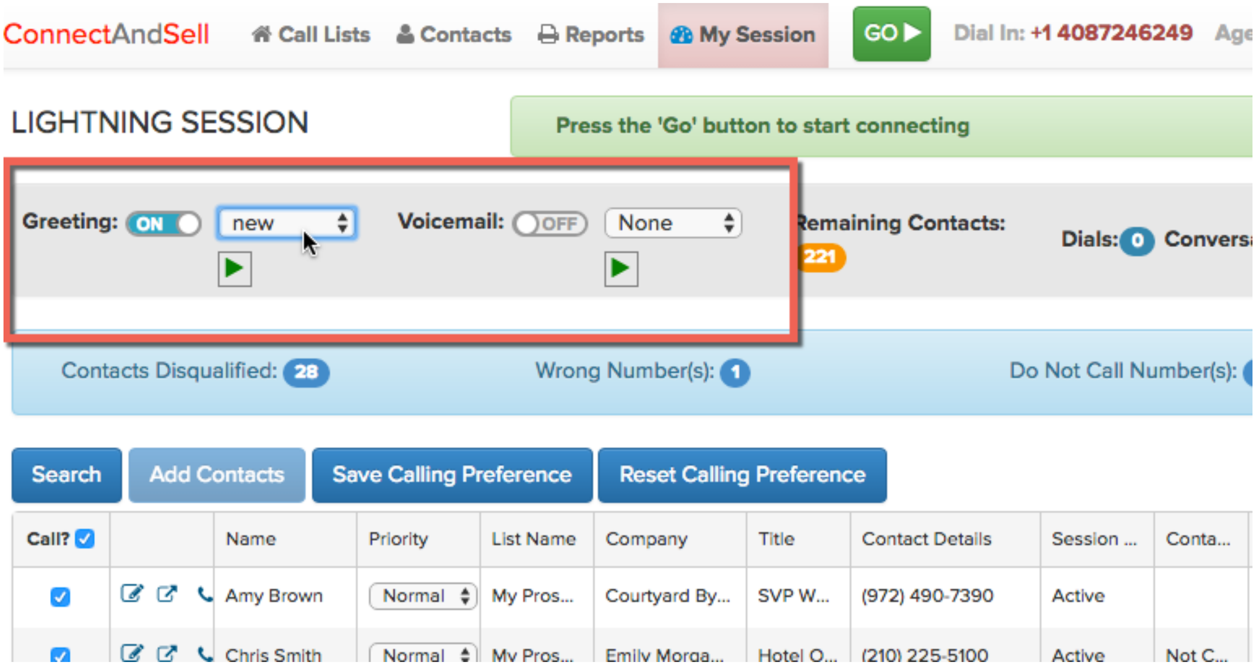


- Remove from all call lists: if you would like to remove a contact from your call list and ensure they are not called on any additional lists, you will need to change the Status of the contact. Click **Edit Contact Info,** change the **Status** and click **Save.**





Enabling a Pre-recorded Greeting/Voicemail



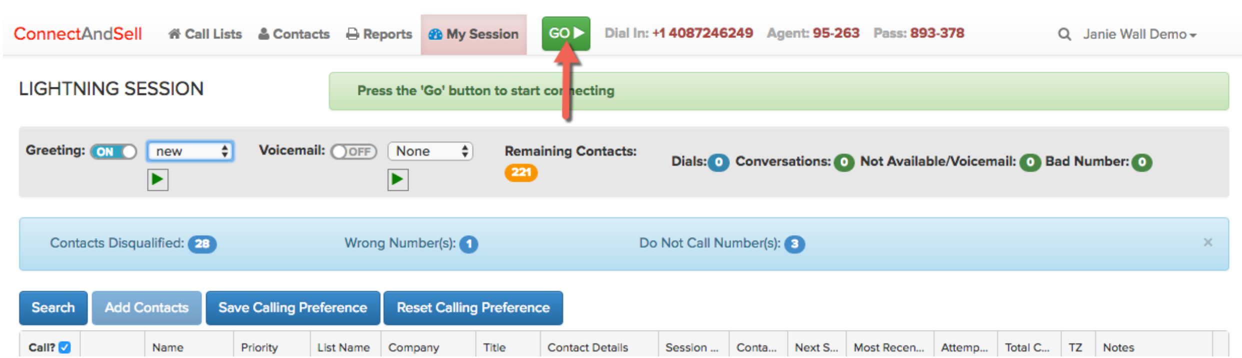
To enable a pre-recorded greeting or voicemail, after loading the list, from the **My Session** page,

- Turn your Greeting/Voicemail **On**
- Select Greeting/Voicemail you want to use

You are now ready to use ConnectAndSell with a Greeting!

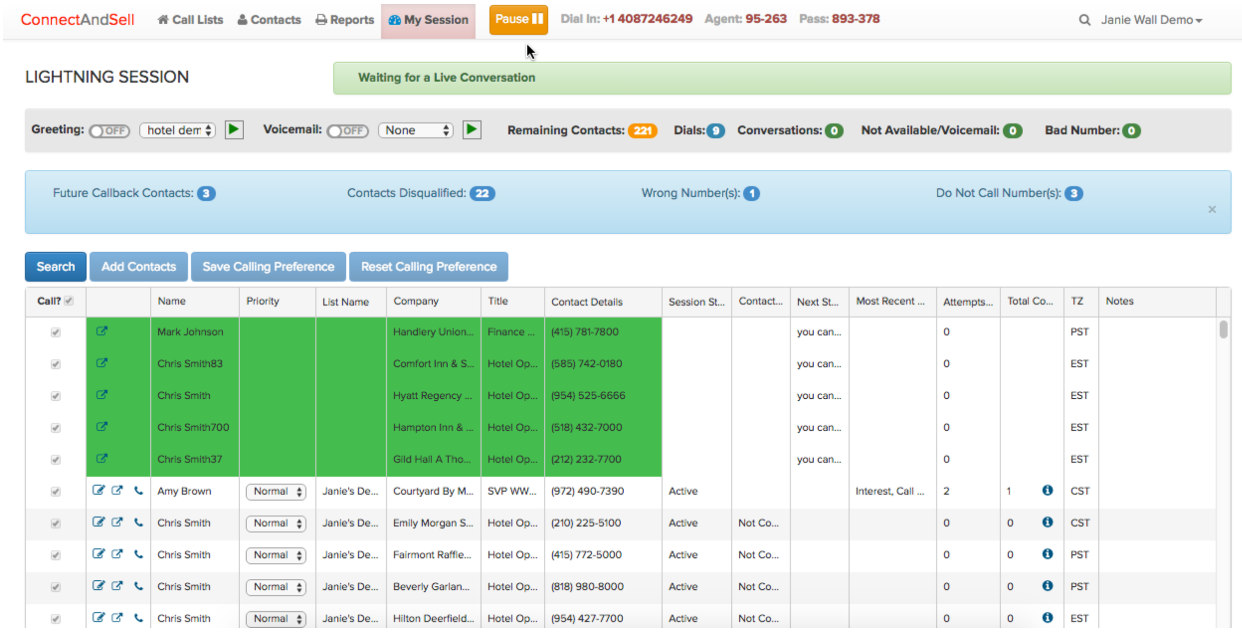
Starting your session

Once you have a list loaded and ready to have conversations, simply click the **Go** button!

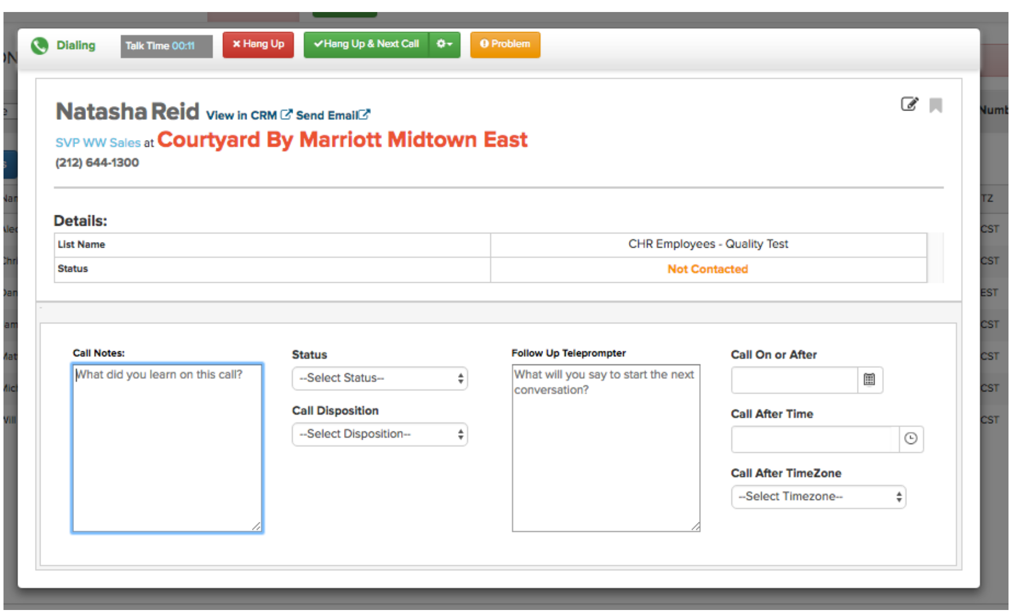


3: During a Session

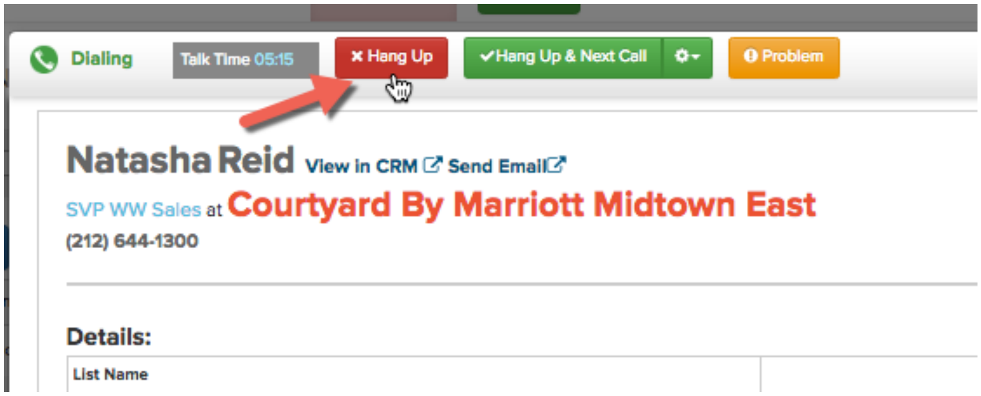
When a session is active, the dials that are being made are highlighted in green.



When a call is transferred, there will be a "Beep" in your headset (if using a Greeting, the Greeting will play and the Contact card will be displayed.



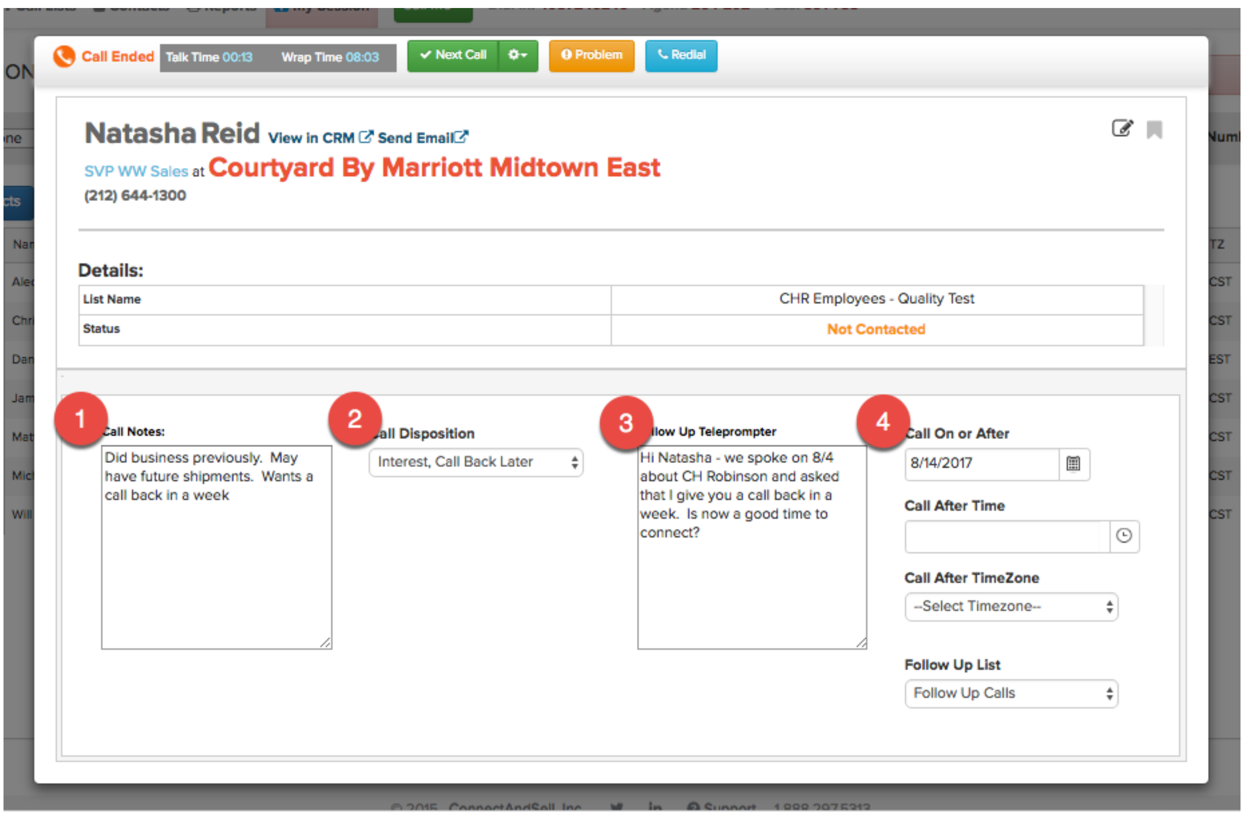
Once the call is Complete, click **Hang Up** to end the call.



4: Documenting your conversation

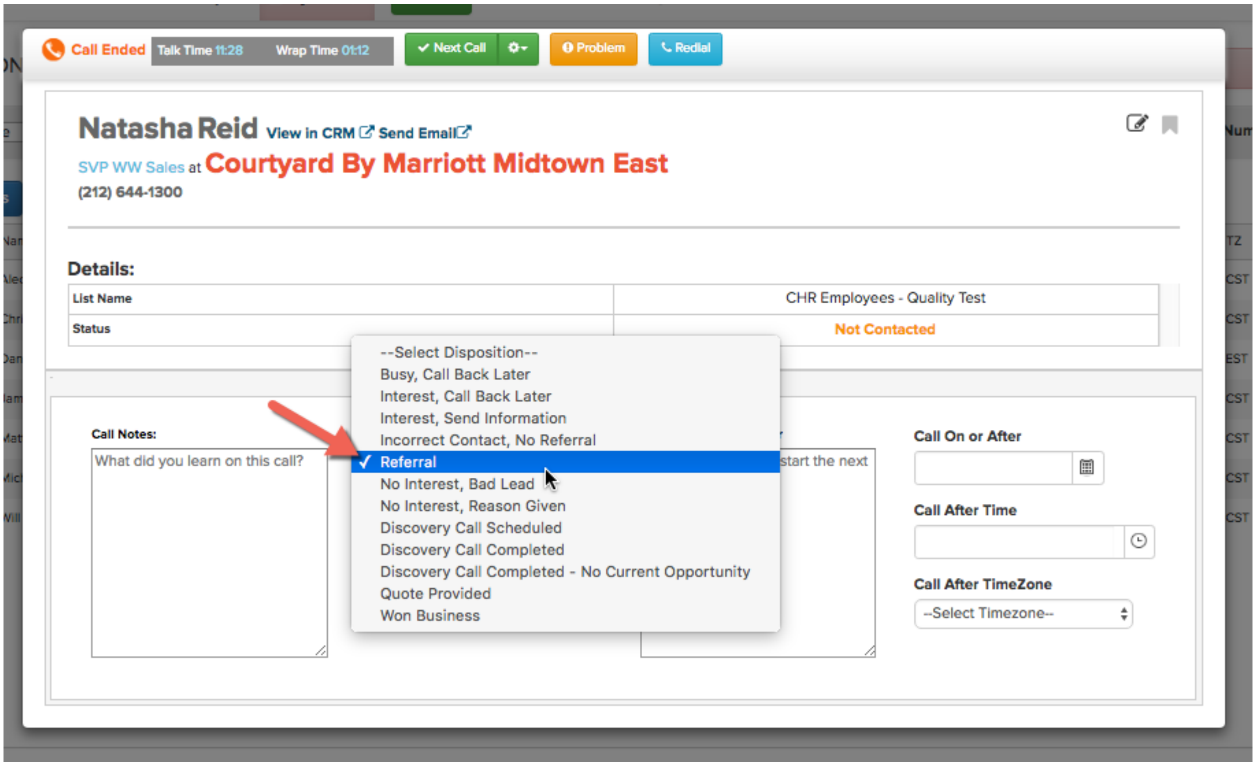
Documenting a Conversation

- Enter **Call Notes** that describe what happened in the conversation
- Select the **Call Disposition** that best describes the outcome of the call
- If appropriate based on your call enter a **Follow Up Teleprompter** that describes what you want to talk to this prospect about the next time you are connected to them
- If you have entered a Follow Up Teleprompter, select a **Call After Date** (This is the "due date" for the Next Step)
- Optionally select a Call Priority



***Follow ups created in ConnectAndSell will be added as unsequenced Call Tasks assigned to you in Outreach

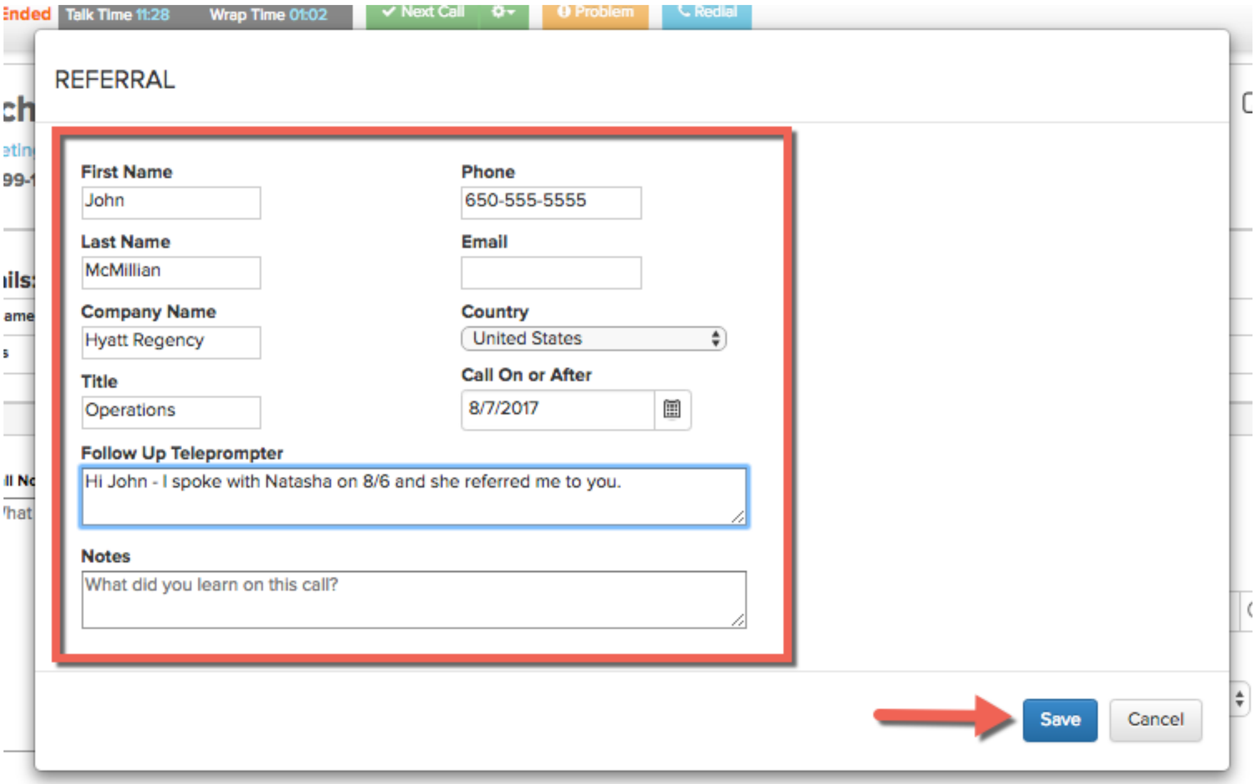
Documenting a Referral



On the Call Connected Pop Up window click the Disposition dropdown list and select **Referral**.

- Complete the **First Name**, **Last Name**, **Company Name**, **Title**, **Email** and Country fields
- Record **Call Notes** that describe the conversation you had with the referring contact
- Enter a **Follow Up Teleprompter** that applies to the referral; be sure to include details about the referring contact and their relationship to the referral contact.
- Enter a **Call After date** that corresponds to when you would like to be connected to the referral. Note: if the Call After Date is the current date, the new contact will be injected into the current session and called on priority. If the Call After Date is any day after, the contact will be added to the **Follow-up Call List.**
- Click **Save.**

***Referrals added in ConnectAndSell will be added to Outreach wil result in a new prospect being created in Outreach with an unsequenced call task assigned to you.



5: Voice Nurturing: follow-up calls

What is a follow-up call?

Most times, people aren't ready to buy from you the moment they pick up the phone. On average, in only 5% of the cases, you will book a meeting on the first call. This is the nature of cold calling.

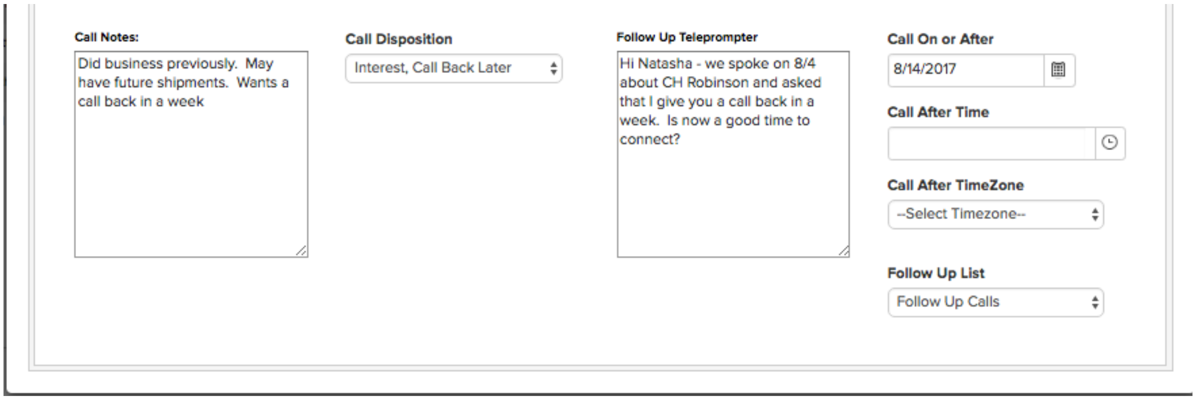
Where you **WIN** and where your opportunity lies is in the remaining 95% of your list!

After Incorrect Contacts and Disqualified Contacts fall out, you are most likely left with 50-70% of your original list which fall into one of these conversation outcomes.

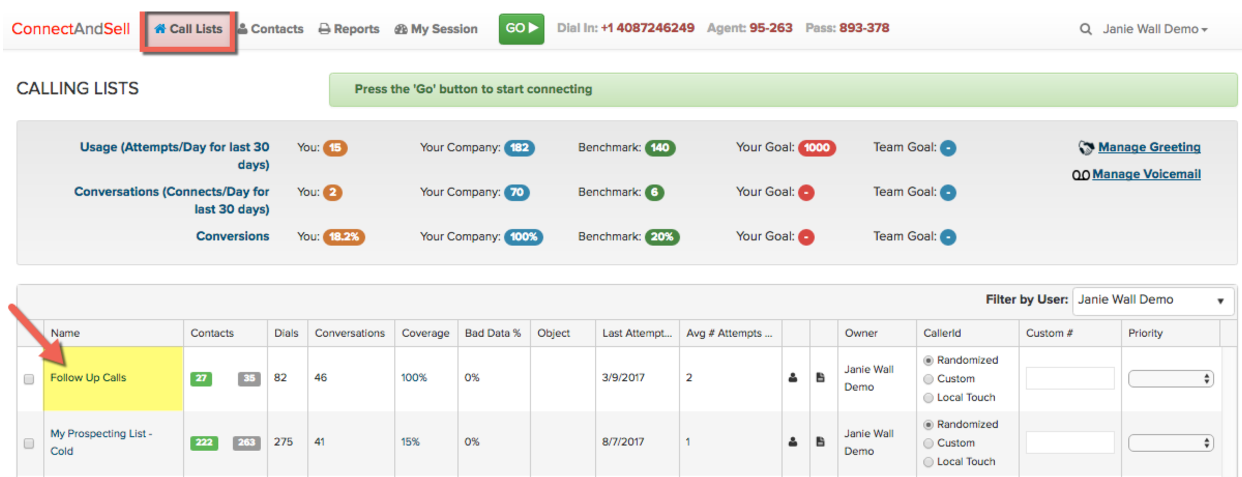
- Busy, Call Back Later – Yes follow up!
- Interest, Call Back Later - Yes follow up!
- Interest, Send Information - Yes follow up!
- Referral- Follow up with the right person
- No Interest, Reason Given - Yes follow up!
- No Interest, No Reason Given - Yes follow up!

Schedule a follow-up

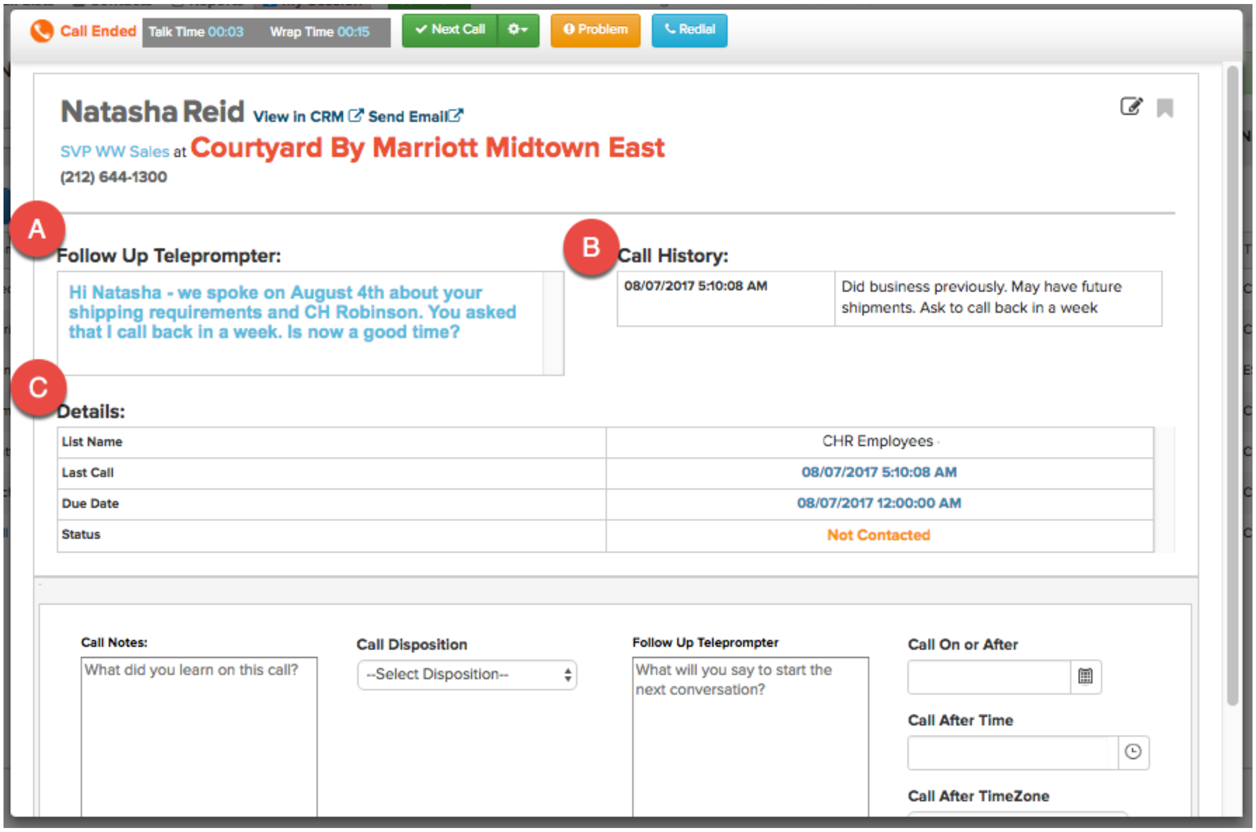
To schedule a follow-up call, enter a **Follow Up Teleprompter** and a **Call On or After** date.



Once the information is entered and the call is saved, the prospect will be moved to the **Follow Up List.**



What is looks like when you connect with a follow up



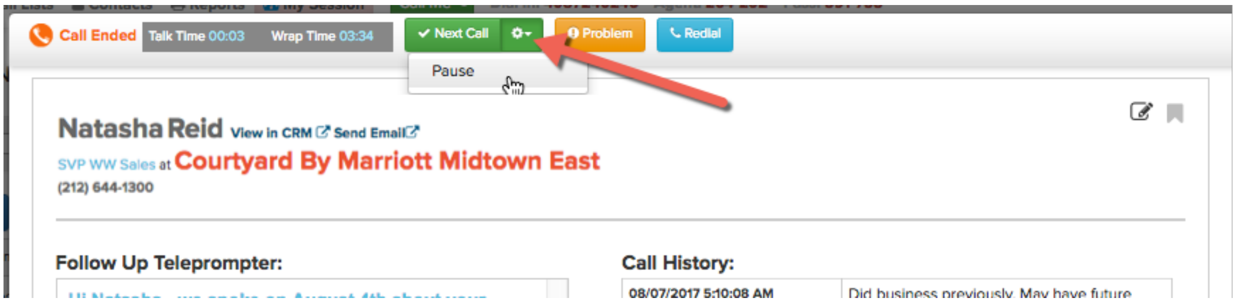
- The **Follow Up Teleprompter** you took on the initial conversation is displayed in blue at the top of the pop up window
- Your **Call notes** from previous calls are Displayed in the **Call History** area
- The date of your **Last Call**, the Due Date for the follow-up and Status will be displayed here.

6: Ending a session

Pausing a session

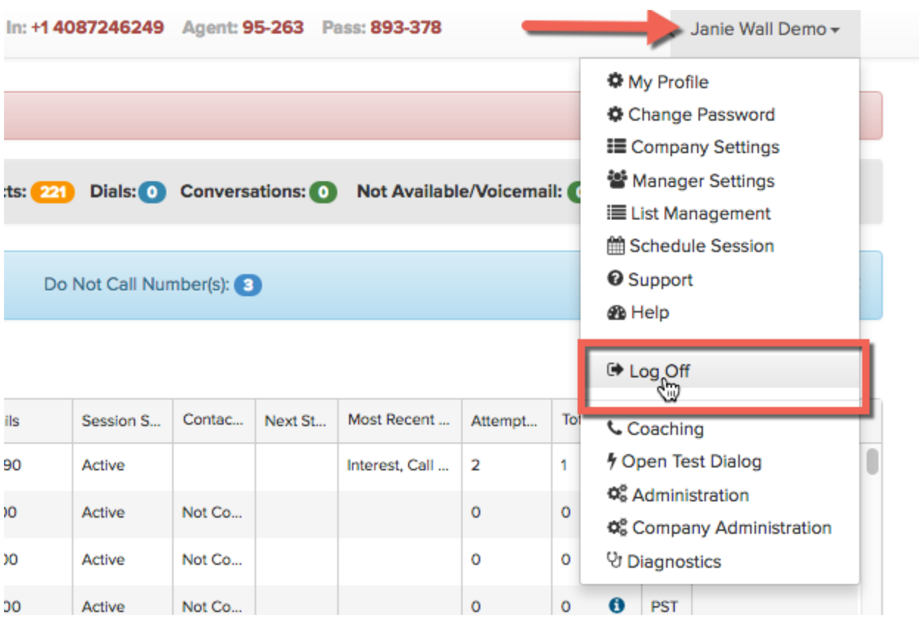
When you are in an active session and would like to Pause or end a session

- Click the gear icon next to the **Next Call** button and click **Pause**



Logging out

When you are ready to end your session, simple click your name in the top right hand corner and click **Log Off.**



7: How to get help if you need it

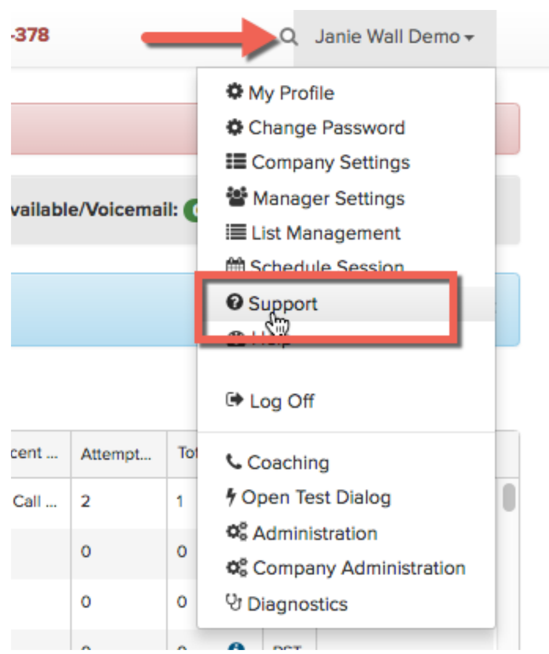
ConnectAndSell Support is available to you from 12:00am to 5:00pm Pacific Monday to Friday. To contact ConnectAndSell Support:

Call Support:

1-888-297-5313

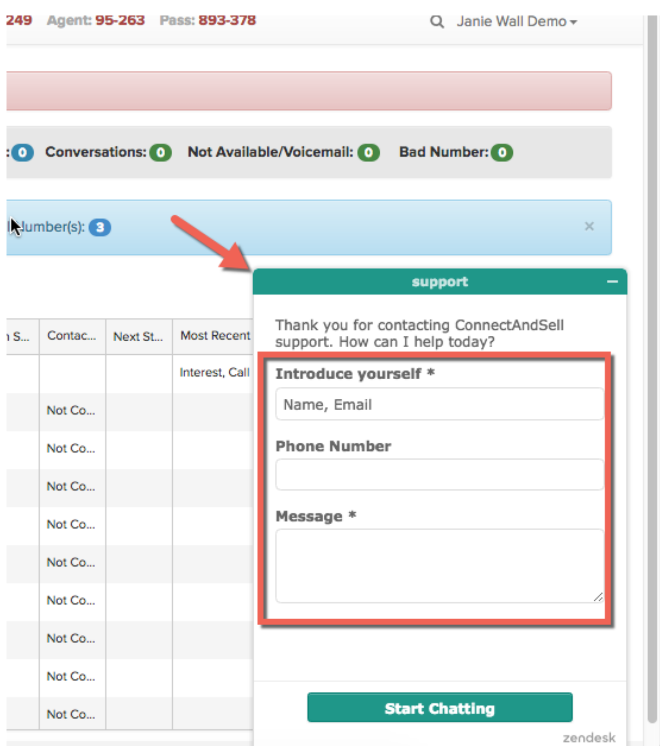
Email Support:

support@connectandsell.com



Live Chat with Support:

- From within ConnectAndSell, click your name form the top right-hand corner and click **Support.**
- Enter your **Name, Email, Phone** and **Message.** A ConnectAndSell Support Agent will connect with you shortly!



Appendix: Creating Call Lists from Salesloft Call Tasks

Creating a Call List

1. Click the Call Lists link at the top of the page
2. Click the New List button
3. Enter a name for the list
4. Confirm the data source selected is Outreach
5. Click Next
6. Enter your Salesloft Login email exactly as it appears in your Salesloft Profile (SalesLoft>Settings>Personal Settings>Profile) (*You will only need to complete this step the first time you create a list)
7. In the New Call List window select the “My Cadence” or “Team Cadence” radio button
8. Select the appropriate cadence from the dropdown list
9. Click the Next button
10. Once the List preview is generated and you confirm that contacts are being pulled in as expected click Submit
11. You will see a Success message confirming the list was successfully created, Click the Close button