

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 <u>userid@connectandsell.com</u> 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.

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ConnectAndSell			
If your browser is slow when using ConnectAndSell Lightning, try using - check under File -> New Incognito Window.			×
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© 2015 ConnectAndSell, Inc. 🎔 in 🛛 Support 1.888.297.5313			

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:

• •	Connect/	AndSell ·	- Callin	g Lists	×													i
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Cor	nectAndSell 🕷 o	Call Lists	å Con	tacts	🔒 Reports	A My Sessio	n Call Me	S Dial I	n: +1 408724624	19 Agent: 95-263	B Pa	ass:	893-378			Q Ja	nie Wall Demo) *
CA	LLING LISTS				Pleas	se use 'Call M	e' or dial +1 4	08724624	9									
	Usage (Attempts/Day Conversations (Con	y for last	30 days y for las 30 days) Yo t Yo)	ou: 15 ou: 2	Your Co Your Co	ompany: 156 ompany: 70	Be	enchmark: 140 enchmark: 6	Your Goa Your Goa	al: 🕧 al: 💿	000	Team (Team (Goal: 💿 Goal: 💿		🐼 <u>Ma</u> QO <u>Man</u>	nage Greetin age Voicema	9. 11
		Con	version	s Yo	ou: 20%	Your Co	ompany: 100%	Be	enchmark: 20%	Your Goa	al: 🗿		Team (Goal: 💿				
														Fi	ter by User:	Janie V	Vall Demo	¥
	Name	Contac	cts	Dials	Conversation	s Coverage	Bad Data %	Object	Last Attempt	Avg # Attempts /			Owner	CallerId	Custom #		Priority	
	Follow Up Calls	27	35	82	46	100%	0%		3/9/2017	2	4	6	Janie Wall Demo	Randomized Custom Local Touch				\$
	Janie's Demo .CSV List	225	262	275	41	15%	0%		8/1/2017	1	4	6	Janie Wall Demo	 Randomized Custom Local Touch 				٥
	Load List(s) Refre	esh List fro	om CRM	D	elete Lists	Edit List Se	ttings	lew List	Export Lists									
						© 20'	15 ConnectA	ndSell, Inc.	⊮ in €	Support 1.888.2	297.5	313						

- 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.

ConnectAndSell - Calling Lists ×	.
← → C ☆ ③ start.connectandsell.com/ConnectAndSell/	ବ ☆ :
ConnectAndSell # Call Lists Contacts 🕀 Reports & My Session GO Dial in: +1 4087246249 Agent: 95-263 Pass: 893-378	Q, Janie Wall Demo≁
CALLING LISTS To get started, please check the box against one or more lists to call and press the "Load Lists" button.	
Usage (Attempts/Day for last 30 days) You: 🚯 Your Company: 🥨 Benchmark: 🕬 Your Goal: ෩ Team Goal: 💿	Tanage Greeting

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:

- <u>Randomized*</u> 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.
- <u>Custom</u> 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 #**
- 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.

••	• Con	nectAndSe	ll - Callin	g Lists														1 8
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Con	nectAndSell	🖀 Call List	ts 🛔 Con	itacts	🔒 Reports 🛛 🖉	My Sessio	n GO►	Dial In: +1	4087246249	Agent: 95-263 F	Pass: 8	893	-378		C	Janie Wall Der	no -	
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		c	onversion	s Yo	ou: 20%	Your Co	ompany: 100%	Be	nchmark: 20%	Your Goa	al: 🗿		Team	Goal: 💿				
														Fil	ter by User: Ja	anie Wall Demo	,	7
	Name	Cor	ntacts	Dials	Conversations	Coverage	Bad Data %	Object	Last Attempt	Avg # Attempts /			Owner	CallerId	Custom #	Priority		
	Follow Up Calls	27	35	82	46	100%	0%		3/9/2017	2	-	6	Janie Wall Demo	 Randomized Custom Local Touch 			\$	
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	Load List(s)	Refresh List	from CRM	D	elete Lists	Edit List Se	ttings	lew List	Export Lists	6								
						© 201	5 ConnectA	ndSell, Inc.	⊮ in €	Support 1.888.2	297.53	313						

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.

		Com	version	s Yo	ou: 20%	Your Co	mpany: 100%	Ber	nchmark: 20%	Your Goa	al: 🖸		Team G	ioal: 💿		
														Filte	er by User: Janie	e Wall Demo 🔹
	Name	Contac	ts	Dials	Conversations	Coverage	Bad Data %	Object	Last Attempt	Avg # Attempts /			Owner	CallerId	Custom #	Priority
	Follow Up Calls	27	35	82	46	100%	0%		3/9/2017	2	4	6	Janie Wall Demo	 Randomized Custom Local Touch 		Normal
•	My Prospecting List - Cold	225	262	275	41	15%	0%		8/3/2017	1	4	6	Janie Wall Demo	 Randomized Custom Local Touch 		High Normal \$

Recording a Greeting

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

Click Manage Greeting

ConnectAndSell	🖀 Call Lists	L Contacts	🔒 Reports	My Session	Call Me 🃞	Dial In: +1 (408)724-6249	Agent: 95-263	Pass: 893-378	Q Janie Wall Demo +
CALLING LISTS		(Please us	se 'Call Me' or dial	+1 (408)724-6	249			
Usage (Attempts/Day	for last 30 day	ys) You:	13 Your C	ompany: (156)	Benchmark: 140	Your Goal: 😑		Manage Greeting
Conversat	tions (Connect	s/Day for last day	30 You: (ys)	3 Your C	ompany: 70	Benchmark: 6	Your Goal: 🔖	Not Set	00 Manage Voicemail
	Po	sitive Outcom	ies You:	28.6% Your C	ompany: 100%	Benchmark: 20%	Your Goal: 😑		

- 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

ConnectAndSell	A Call Lists	Contacts	🔒 Reports	My Session GO	Dial In: +1 4087246249	Agent: 95-263 Pass: 893	-378	Q Janie Wall Demo v
CALLING LISTS			Pre	ss the 'Go' button to sta	art connecting			
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	30 Conve	0 days) ersions Y	′ou: 20%	Your Company:	100% Benchmark: 20%	Your Goal:	Team Goal: 💽	<u> </u>
						· · · · · · · · · · · · · · · · · · ·	•	

- 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

Name	Contacts	Dials	Conversations	Coverage	Bad Data %	Object	Last Attempt	Avg # Attempts /			Owner	CallerId
) Follow Up Calls	27 3	5 82	46	100%	0%		3/9/2017	2	4	6	Janie Wall Demo	 Randomized Custom Local Touch
My Prospecting L	st - Cold 225 26	2 275	41	15%	0%		8/3/2017	1	4	в	Janie Wall Demo	 Randomized Custom Local Touch

Session Settings

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

- 1) Filters
- 2) List Settings

Session Dial Settings Dialing Mode: Lightning Dialer	Х
Dialing Mode:	
Dialing Order: Top To Bottom System Optimized Start From Where I Left Off	
Time Zone Filter: Select All @ EST (167) @ PST (40) @ CST (47)	re
Country Code Filter: Select All United States 267	
Titles Filter: Select All V Unknown (255) VP (4) C-Level (3)	re
List Settings	
My Prospecting List - Cold	
Max Attempts Per Contact Per Day: 3 Max Attempts Per Contact In List: 20	
Minimum Delay Between Re-dials: 15 Minutes Connect on Hello Enabled	

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.

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onnect/	AndSell	谷 Call Lists	å Contacts	🕀 Reports	🚯 My Session	GO ►	Diai in: +1 408724624	9 Agent: 9	5-263 Pa	ss: 893-37	78			0	Janie Wall Der	no v
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LIGHTN	IING SES	SION		Pres	s the 'Go' button	to start con	inecting									
Greeting:		Intro - Auç 🛊 🕨	Voicemai		None 🛊 🕨	Rema	ining Contacts: (221)	Dials: 0	Conversa	tions: Օ	Not Available	/Voicemail	• 🕐 🗉	ad Nur	nber: 🗿	
			_			-										
Conta	acts Disqual	fied: 24		Wrong	Number(s): 1		Do	Not Call Num	nber(s): 3							×
						_										
Search	Add Cor	tacts Save C	Calling Prefere	nce Rese	et Calling Preferer	ice										
Call?		Name	Priority	List Name	Company	Title	Contact Details	Session St	Contact	Next St	Most Recent	Attempts	Total Co	ΤZ	Notes	
	RRV	Amy Brown	Normal *	My Prospe	Courtyard By M	SVD WAV	(972) 490-7390	Active			Interest Call B	2	1 0	CST		
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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.

С	onnect	AndSell	☆ Call Lis	ts 🛔 Conta	cts 🔒 Rep	oorts 🙆 My S	Session	GO Dial In:	1 4087246	249 Ag	ent: 95-2	63 Pass: 893	3-378		Q	Ja	nie Wall Demo v	
L	IGHTN	NING SE	SSION		Pres	ss the 'Go' butt	on to start	connecting										
	Greeting		new 🛟	Voicema	il: Ooff)	None 🗘	Rema	ining Contacts:	Dials:0	Convers	sations:	Not Availab	le/Voicem	ail: 💽	Bad	Nur	mber: 🗿	
ſ	Cont	acts Disqua	alified: 28		Wrong) Number(s): 🚺	•	Do	Not Call Nu	ımber(s): (3						\$	ĸ
	Search	Add Co	ontacts Sa	ave Calling Pr	eference	Reset Calling	g Preferenc	e										
	Search	Add Co	ontacts Sa Name	ave Calling Pr	eference List Name	Reset Calling	Preferenc	contact Details	Session	Conta	Next S	Most Recen	Attemp	Total	C	TZ	Notes	
	Search	Add Co	ontacts Sa Name Amy Brown	Priority Normal \$	eference List Name My Pros	Reset Calling Company Courtyard By	Preference Title SVP W	Contact Details (972) 490-7390	Session Active	Conta	Next S	Most Recen Interest, Cal	Attemp 2	Total 1	C	тz С	Notes	
	Search Call? 2	Add Co	ontacts Se Name Amy Brown Chris Smith	Priority Normal \$	eference List Name My Pros My Pros	Reset Calling Company Courtyard By Emily Morga	Title SVP W Hotel O	Contact Details (972) 490-7390 (210) 225-5100	Session Active Active	Conta Not C	Next S	Most Recen Interest, Cal	Attemp 2 0	Total 1 0	c 2	TZ C	Notes	0
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- To begin, click **Search**.
- Enter Search criteria and click Search Contacts. Contacts meeting search criteria will appear.

Lists	Conta	ts 🔒 Rej	oorts 🚯 My S	ession	GO Dial in: +	1 40872462	19 Age	nt: 95-263	Pass: 893-3	378		Q Ja	anie Wall Der
	Search	Contact	(s)										×
\$	Please First Na	enter any	of the followin	g details to	search for matchi	ng contacts	nany Na	me'	,	"itle:			Ð
	First	lame		Last Na	ame	Н	lton	ine.		Title			
	Searc	n Contacts											
Sav	e Calling Pr	eference	Reset Calling	Preference	e								
	Priority	List Name	Company	Title	Contact Details	Session	Conta	Next S	Most Recen	Attemp	Total C	ΤZ	Notes

▶ 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.

Search	Clear	Search	Add Contacts	Save Ca	lling Preference	•	Reset	Calling Preference	Calling	Preferen	ce Saved	Successfully		
Sall? 🗌		Name	Priority	List Name	Company	Title		Contact Details	Session	Conta	Next S	Most Recen	Attemp	Тс
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	66	Chris Sm	ith Normal 🖨	My Pros	Hilton Bosto	Hote	I O	(617) 568-6700	Active				0	0
	66	Chris Sm	ith High \$	My Pros	Hilton Bosto	Hote	I O	(781) 932-0999	Active			User Not Av	2	0

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.

Search	Clea	ır S	Search	Ad	d Contacts	Save Ca	lling Preference	Rese	t Calling Preference				
Call?			Name		Priority	List Name	Company	Title	Contact Details	Session	Conta	Next S	Most Recen
	C C	c	Chris Smit	h	Normal \$	My Pros	Hilton Bosto	Hotel O	(781) 329-7900	Active			
	66	c	Chris Smit	h	Normal \$	My Pros	Hilton Bosto	Hotel O	(617) 556-0006	Active			
	66	c	Chris Smit	h	Normal \$	My Pros	Hilton Bosto	Hotel O	(617) 568-6700	Active			
	66	c	Chris Smit	h	(High \$	My Pros	Hilton Bosto	Hotel O	(781) 932-0999	Active			User Not Av

Edit Contact Info *Contact will be removed from	Penalty Box on changing phone number	х
First Name Last Name	Chris	
Company Name	Hilton Boston/Dedham	
Title Email	Hotel Operator	
Phone1 Phone2	(781) 329-7900	
Status	✓Select Status Not Contacted	
Talking Points	Contacted Disqualified	
	Save	1

Enabling a Pre-recorded Greeting/Voicemail

Connect	AndS	ell	A Cal	Lists	🚨 Conta	cts 🔒 Re	ports	🚯 My S	iession	GO 🕨	Dial In: +	1 4087246	249 Age
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Greeting	I: ON	D	new	¢	Voicema	ail: OFF)	Non	e 🛊	Rema 221	aining Cont	acts:	Dials:0	Convers
Cont	acts Dis	qu	alified: 28			Wrong	g Numb	per(s): 1	,		Do	Not Call Nu	ımber(s):
Search	Add	I C	ontacts	Save	e Calling Pr	eference	Rese	et Calling	Preferen	ce			
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	60	c	Chris Smith	1	Normal \$	Mv Pros	Emily M	Morga	Hotel O	(210) 225-5	5100	Active	Not C

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!

ConnectAndSell & Call Lists	🛎 Contacts 🛛 🔒 Reports	My Session GO	Dial In: +1 408724624	19 Agent: 95-26	3 Pass: 893-378	Q J	anie Wall Demo -
LIGHTNING SESSION	Press the '	Go' button to start cor nect	ting				
Greeting: ON new 🗘	Voicemail: OFF None	Remaining Co	ontacts: Dials: 0 C	Conversations: 0	Not Available/Voice	mail: 🕕 Bad Nu	mber: 0
Contacts Disqualified: 28	Wrong Numb	er(s): 1	Do Not Call Num	nber(s): 3			×
Search Add Contacts Sav	e Calling Preference Rese	t Calling Preference	Details Session C	Conta Next S	Most Recen Attemp	Total C TZ	Notes

3: During a Session

Connect	AndSell	☆ Call Lists	🔓 Contacts	🖨 Reports	My Session	Pause 🚺	Dial In: +1 408724	46249 Ager	nt: 95-263	Pass: 89	3-378			Q	Janie Wall Demo v
LIGHTN	ING SES	SION		Wait	ing for a Live Cor	versation									
Greeting:	OOFF)	hotel dem 🛟 🕨	Voicema		None 🛟 🕨	Remai	ning Contacts: 221	Dials: 🕥	Converse	ations: 이	Not Available	/Voicemail:	🚺 Ba	d Num	ber: 🗿
Future	e Callback C	iontacts: 3		Contac	cts Disqualified: 💽	2	Wro	ong Number(s): 1			Do Not Call	Number(s)	3	×
Search	Add Con	tacts Save (Calling Prefere	ence Res	et Calling Prefere	nce									
Call? 🗹		Name	Priority	List Name	Company	Title	Contact Details	Session St	Contact	Next St	Most Recent	Attempts	Total Co	ΤZ	Notes
×.	C.	Mark Johnson			Handlery Union	Finance	(415) 781-7800			you can		0		PST	0
	ø	Chris Smith83			Comfort Inn & S	Hotel Op	(585) 742-0180			you can		0		EST	
	Ø	Chris Smith			Hyatt Regency	Hotel Op	(954) 525-6666			you can		0		EST	
	ø	Chris Smith700			Hampton Inn &	Hotel Op	(518) 432-7000			you can		0		EST	
×.	ø	Chris Smith37			Gild Hall A Tho	Hotel Op	(212) 232-7700			you can		0		EST	
ø	CC.	Amy Brown	Normal \$	Janie's De	Courtyard By M	SVP WW	(972) 490-7390	Active			Interest, Call	2	1 0	CST	
Ø	88 L	Chris Smith	Normal \$	Janie's De	Emily Morgan S	Hotel Op	(210) 225-5100	Active	Not Co			0	0 0	CST	
ø	80 L	Chris Smith	Normal \$	Janie's De	Fairmont Raffie	Hotel Op	(415) 772-5000	Active	Not Co			0	0 0	PST	
Ø	88.	Chris Smith	Normal \$	Janie's De	Beverly Garlan	Hotel Op	(818) 980-8000	Active	Not Co			0	0 0	PST	
đ	88.	Chris Smith	Normal \$	Janie's De	Hilton Deerfield	Hotel Op	(954) 427-7700	Active	Not Co			0	0 0	EST	

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.

VP WW Sales at Courtyard 212) 644-1300	RM 🖾 Send Email 🖾 By Marriott Midtown	East		
etails:				
ist Name		CHR Employee	s - Quality Test	
tatus		Not Con	ntacted	
Call Notes: What did you learn on this call?	Status Select Status +	Follow Up Teleprompter What will you say to start the next	Call On or After	
		conversation?		
	Call Disposition		Call After Time	
	Call DispositionSelect Disposition		Call After Time	•
	Call Disposition		Call After Time Call After TimeZone	Θ

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

Natasha Reid View in CRM ^C Send Email ^C SVP WW Sales at Courtyard By Marriott Midtown (212) 644-1300	East		I	
Details:				
List Name	CHR Employee	es - Quality Test		
Status	Not Co	ntacted		
All Notes: Did business previously. May have future shipments. Wants a call back in a week	about CH Robinson and asked that I give you a call back in a week. Is now a good time to connect?	Call After Time	©	
		Call After TimeZone		
		Select Timezone	ŧ	
	LA	Follow Up List		
		Follow Up Calls	\$	

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

Documenting a Referral

Natasha Reid View in CR SVP WW Sales at Courtyard (212) 644-1300	M ^{CP} Send Email ^{CP} By Marriott Midtown East	n East				
Details:						
list Name		CHR Employees	s - Quality Test			
Status		Not Con	tacted			
Call Notes:	Busy, Call Back Later Interest, Call Back Later Interest, Send Information Incorrect Contact, No Referral		Call On or After			
What did you learn on this call?	✓ Referral No Interest, Bad Lead	start the next				
	No Interest, Reason Given Discovery Call Scheduled		Call After Time	0		
	Discovery Call Completed Discovery Call Completed - No Current Opportu Quote Provided	inity	Call After TimeZone			
	Won Business		Select Timezone	¢		

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.

irst Name	Phone		
John	650-555-5555		
ast Name	Email		
McMillian			
Company Name	Country		
Hyatt Regency	United States	\$	
itle	Call On or After		
Operations	8/7/2017		
ollow Up Teleprompter			
Hi John - I spoke with Natasha d	on 8/6 and she referred me to you	I.	
lotes			
What did you learn on this call?			

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.

Call Notes:	Call Disposition	Follow Op Teleprompter	Call On or After	
Did business previously. May have future shipments. Wants a	Interest, Call Back Later 🔹 🛊	Hi Natasha - we spoke on 8/4 about CH Robinson and asked	8/14/2017	
call back in a week		that I give you a call back in a week. Is now a good time to	Call After Time	
		connect?		(
			Call After TimeZone	
			Select Timezone	ŧ
			Follow Up List	
			Follow Up Calls	¢

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

С	onr	ectAndSell 🖪 Ca	II Lists	≜ Co	ntacts	🔒 Reports	My Sess	sion GO	Dial In	: +1 40872462	49 Agent: 95-20	53	Pass:	893-378		Q	Janie Wall Demo	Ŧ
CALLING LISTS Press the 'Go' button to start connecting																		
Usage (Attempts/Day for last 30 Yo days)				ou: 15	: 15 Your Company: 182			Benchmark: 140		Your Goal: 1000		Team G	Team Goal: 💿		Tanage Greeting			
	Conversations (Connects/Day for Yo last 30 days)			ou: 2	Your Company: 70			Benchmark: 6 You		Your Goal: 😑 Team 🤇		Goal: 💿		Manage Voicemail				
	Conversions Yo			DU: 18.2%	Your Company: 100% Benchmark: 20%		Your Goal: 😑 Team		Team G	ioal: 😑								
J	Filter by User: Janie Wall Demo 🔹																	
		Name	Contac	:ts	Dials	Conversations	Coverage	Bad Data %	Object	Last Attempt	Avg # Attempts			Owner	CallerId	Custom #	Priority	
		Follow Up Calls	27	35	82	46	100%	0%		3/9/2017	2	•	6	Janie Wall Demo	 Randomized Custom Local Touch 			\$
		My Prospecting List - Cold	222	263	275	41	15%	0%		8/7/2017	1	۵	6	Janie Wall Demo	 Randomized Custom Local Touch 			٥

What is looks like when you connect with a follow up

SVP WW Sales at Courtyard By Marriott Midtor (212) 644-1300	wn East	C 🗖						
A Follow Up Teleprompter:								
Hi Natasha - we spoke on August 4th about your shipping requirements and CH Robinson. You asked	08/07/2017 5:10:08 AM	Did business previously. May have future shipments. Ask to call back in a week						
Details: List Name Last Call Due Date Status	08/0	CHR Employees - 07/2017 5:10:08 AM 07/2017 12:00:00 AM 07/200 AM 07/2000 AM 07/2000 AM 07/2000 AM 07/2000 AM 07/2000 AM 07/200						
Call Disposition Call Disposition What did you learn on this call? -Select Disposition	What will you say to start the part conversation?	Call On or After						
	HEAL GUIVEISBUUIT	Call After Time						

- 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

Call Ended Talk Time 00:03 Wrap Time 03:34 Vext Call Ov O Pro	blem C Redial	
Natasha Reid View in CRM ⁽²⁾ Send Email ⁽²⁾ SVP WW Seles at Courtyard By Marriott Midtown East (212) 644-1300		
Follow Up Teleprompter:	Call History:	
III Matacha analis an Assault 4th about	08/07/2017 5:10:08 AM	Did business previously. May have future

Logging out

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

ln: +1 4	4087246249	Agent: 9	5-263 P	ass: 893-378	-	-	Janie Wall Demo -
:ts: 22	Dials: 0	Converse	ations: 0) Not Availabl	e/Voicema	il: (My Profile Change Password Company Settings Manager Settings List Management Schodule Session
D	o Not Call Nur	mber(s):					Support B Help
		1					ເቀ Log Off
ils	Session S	Contac	Next St	Most Recent	Attempt	Tot	Coaching
90	Active			Interest, Call	2	1	Open Test Dialog
00	Active	Not Co			0	0	 Administration Company Administration
)0	Active	Not Co			0	0	𝘌 Diagnostics
00	Active	Not Co			0	0	PST

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
- 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