High Velocity Sales with Natterbox: Guide for Admins

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Introduction to High Velocity Sales

High Velocity Sales with Natterbox enables agents to use click-to-dial to initiate calls from either the work queue or Sales Engagement section of a record in High Velocity Sales, with these calls being automatically logged. The wrap up / disposition codes selected by agents can also be mapped to the HVS call result, which then drives the next step in the sales cadence.

Setting Up

We'll now break down what you'll need from a licence and technical pre-requisite perspective to get started.

Licence prerequisites

Your agents who will be using High Velocity Sales need to have the following licences from Salesforce and Natterbox:

Salesforce

- Sales Cloud
- High Velocity Sales

Natterbox

- Freedom

Technical prerequisites

Natterbox

Your Natterbox integration with Salesforce needs to be complete before you're able to proceed with the steps below.

You will need to have installed these - or more recent - package versions:

- Natterbox version 1.181.0
- CTI 2.25

Salesforce High Velocity Sales

High Velocity Sales needs to be configured and ready to use. Please follow the steps in the Salesforce High Velocity Sales Implementation guide if you have not already done so.

Hardware

Users need to be on a PC or Mac computer, with the requirements following those of Salesforce Lightning - see here

Computers need to have built-in speakers and a microphone or ability to connect to these devices externally.

Audio equipment

Users will need to have speakers and a microphone enabled. While it is possible to use inbuilt desktop / laptop speakers, attaching an audio headset with a microphone will give better sound quality for the user, as well as preventing background noise and feedback for other participants on the call. If connecting to an external device via Bluetooth, the user will perform this set up in their computer settings.

Web Browser

Users need to be on the latest stable version of Google Chrome.

Salesforce version

Users need to be on Salesforce Lightning.

Web RTC

The Natterbox webphone allows you to make and receive calls from your device without the need to install any software. To check that your network is ready to start using webphone, you can use the test tool here: https://test.webrtc.org/

For more details on how to use the webphone, please see our Client Advisories for Webphone and PBX

Steps to be completed during setup

Once you've completed the steps from the Salesforce High Velocity Sales Implementation guide, here's what you need to do to get Natterbox working in High Velocity Sales.

Make Natterbox Available for High Velocity Sales App

Go to:

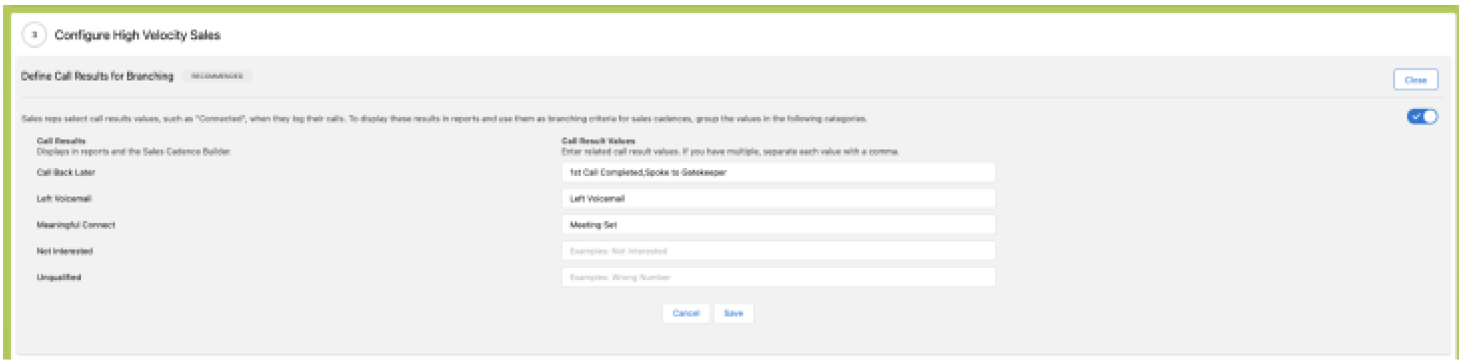
- **Setup**
- **App Manager**
- Find your **High Velocity Sales** app and click **Edit**
- Add **Natterbox CTI** to the **Utility Bar** and **Save**

Defining call outcomes

Go to:

- **Setup**
- Start to type "High Velocity Sales" in the search field
- Click on **High Velocity Sales** when it appears

Under step 3 of setup, **Configure High Velocity Sales: Define Call Results for Branching** is where you'll define how the **Wrap-Up codes** your users select in Natterbox Freedom relate to the **Call Results** in High Velocity Sales:



There is a choice of five **Call Results** which define what action to take next in the cadence. These are:

1. Call Back Later

2. Left Voicemail

3. Meaningful connect

4. Not interested

5. Unqualified

To set these up, you need to:

- Enable **Define Call Results for Branching** *(Section 3 of the High Velocity Sales Setup Wizard)* by ensuring this box underneath the Close button is ticked:

- Type in the Natterbox **Wrap-Up code** alongside each **Call Result** you want it to relate to (separate each by a comma if there is more than one **Wrap-Up code** per **Call Result**)*.

* Please make sure you type in the **Wrap-Up code** exactly as it appears in Natterbox to ensure it maps correctly to the **Call Result**. There is no warning to tell you if you've got this wrong!

- Click **Save**

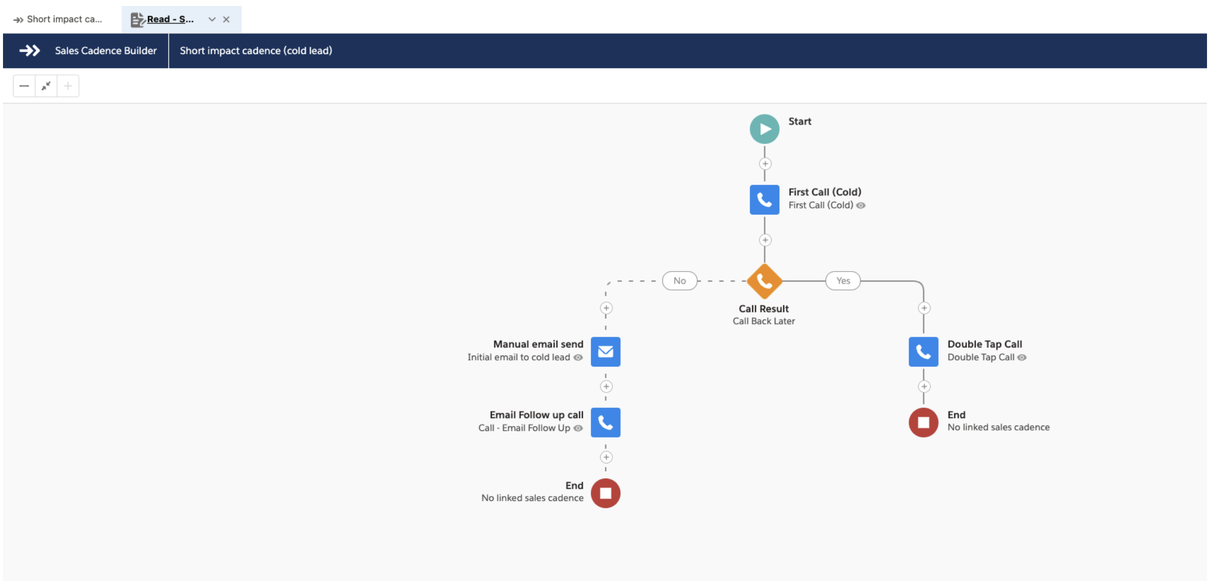
You can find your Natterbox **Wrap-Up codes** in the **Natterbox Call Centre Configuration** object in Salesforce. Please ensure you map these based on your **Outbound** wrapup codes.

Wrapup Codes (Outbound)

Locale Specific Labels: View Labels For Existing Locale...

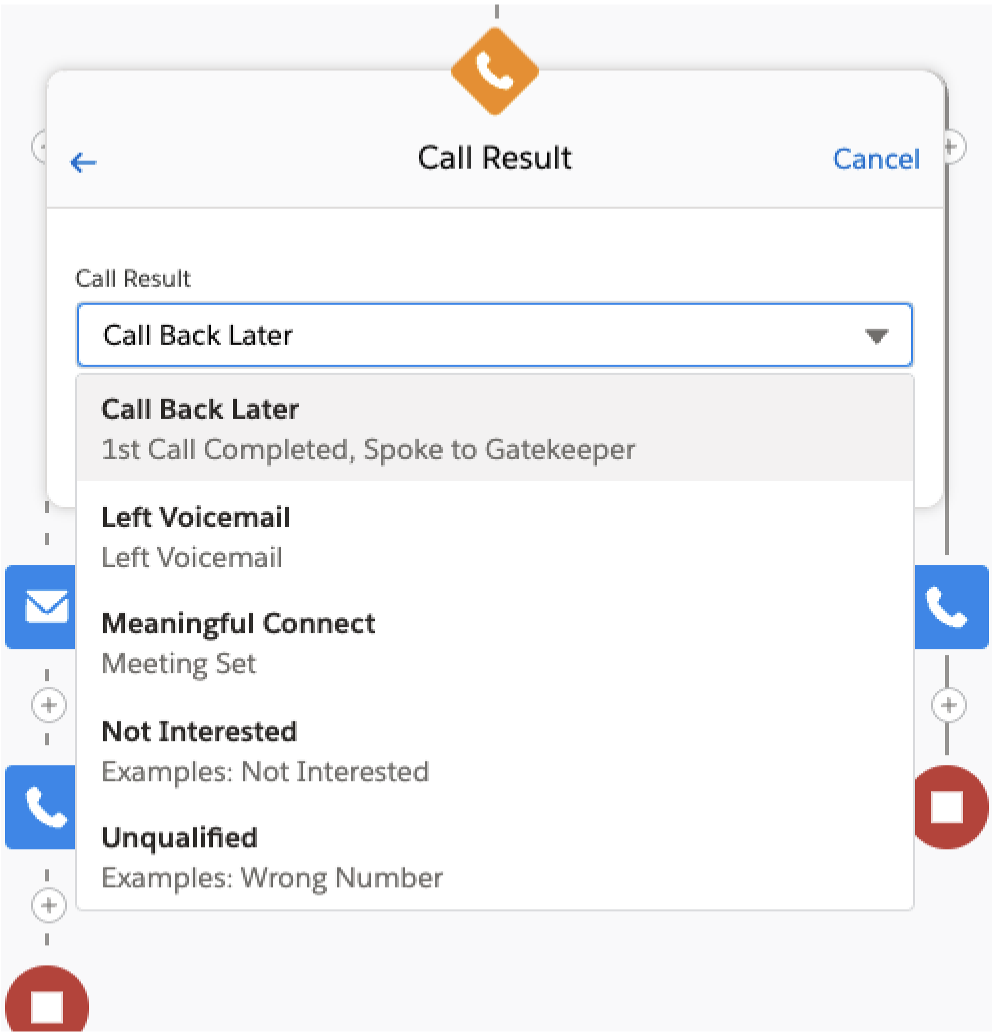
Label	Code
Call successful	0
Left voicemail	1
Appointment set	2
Able to pitch	3
Decision maker not reached	4

As you've mapped your **Wrap-Up codes** to **Call Results**, you'll now set up the next steps of the Sales Cadence.

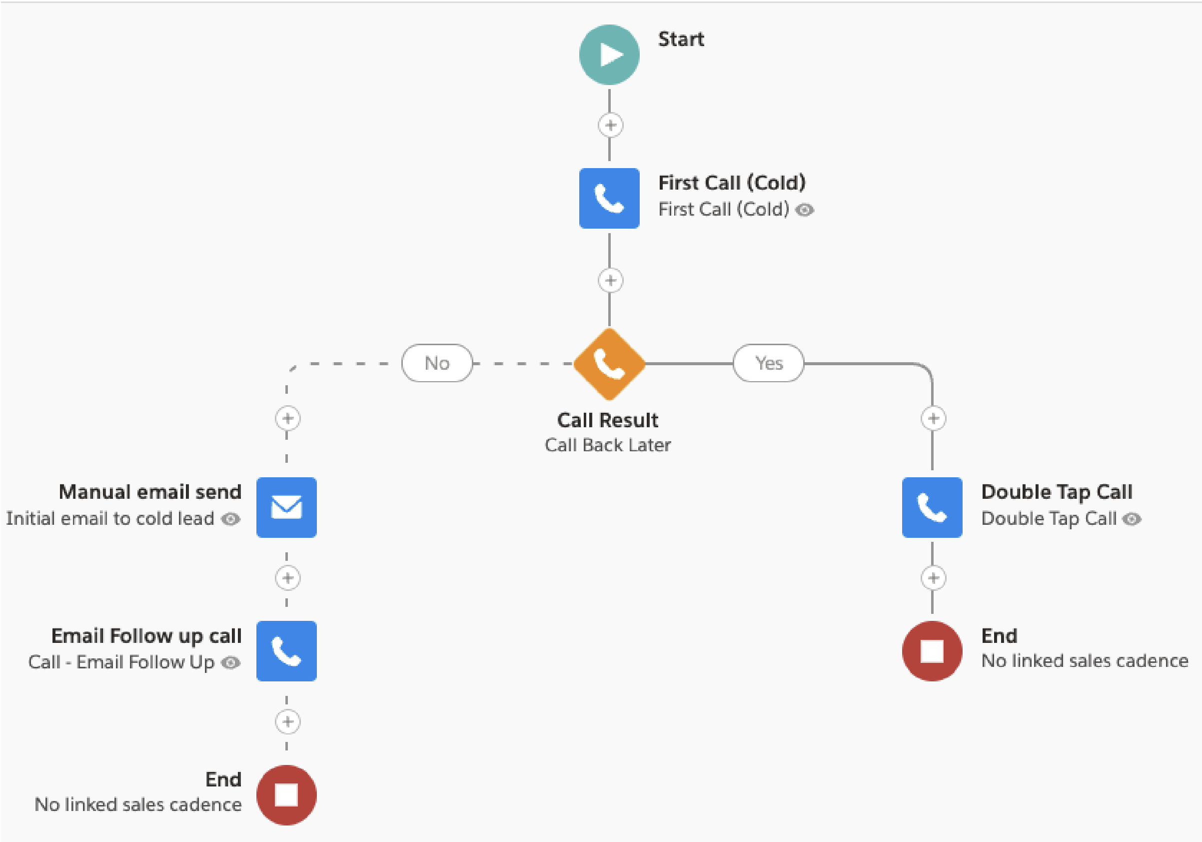


In this example, we can see the first action of the Sales Cadence is **First Call (Cold)**, when this action is created it is also possible to include a Salesforce Call Script that corresponds with that cadence step. The outcome of which has two potential next actions: **Manual email send** or **Double Tap Call.**

Clicking on **Call Result** will show the five possible **Call Results** and their corresponding **Wrap-Up codes** you've mapped them to below:



For example, when an agent chooses the "Spoke to Gatekeeper" **Wrap-Up code**, this is mapped to the "Call Back Later" **Call Result** which then sends the agent down the right branch of the sales cadence to the next action which is **Double Tap Call**.

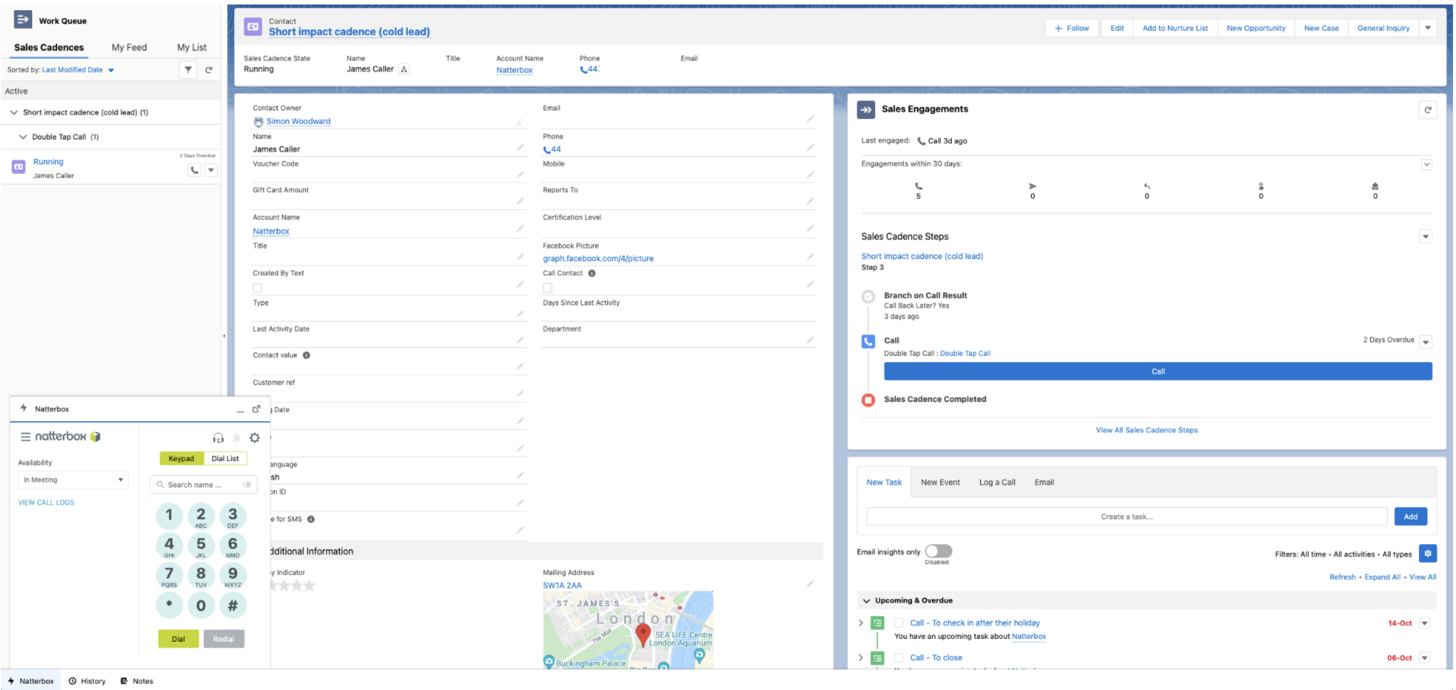


Any other **Wrap-Up code** and therefore **Call Result** will go down the left branch which is **Manual email send**.

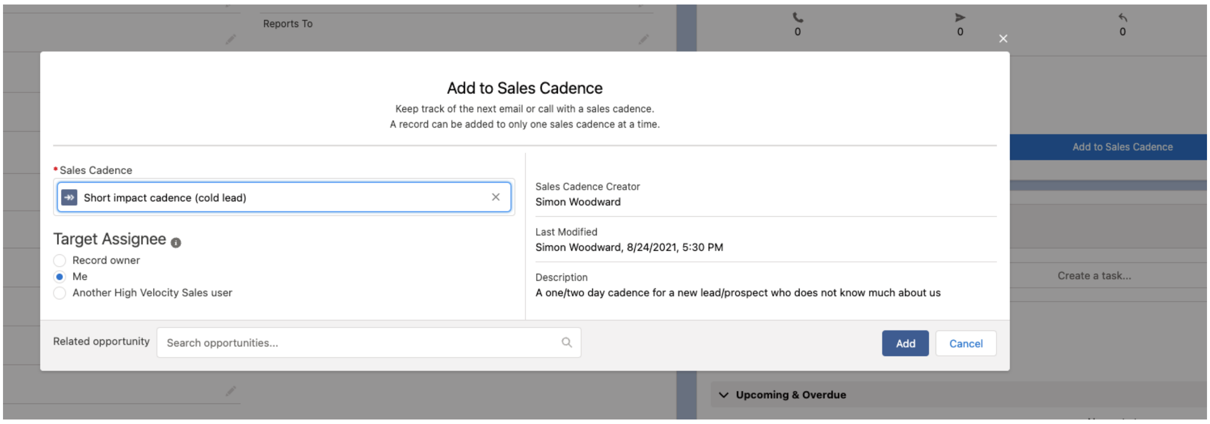
Note it is possible to add in an additional **Call Result** and create as many different branches as you need to.

Now go to the **Contact**[1] record:

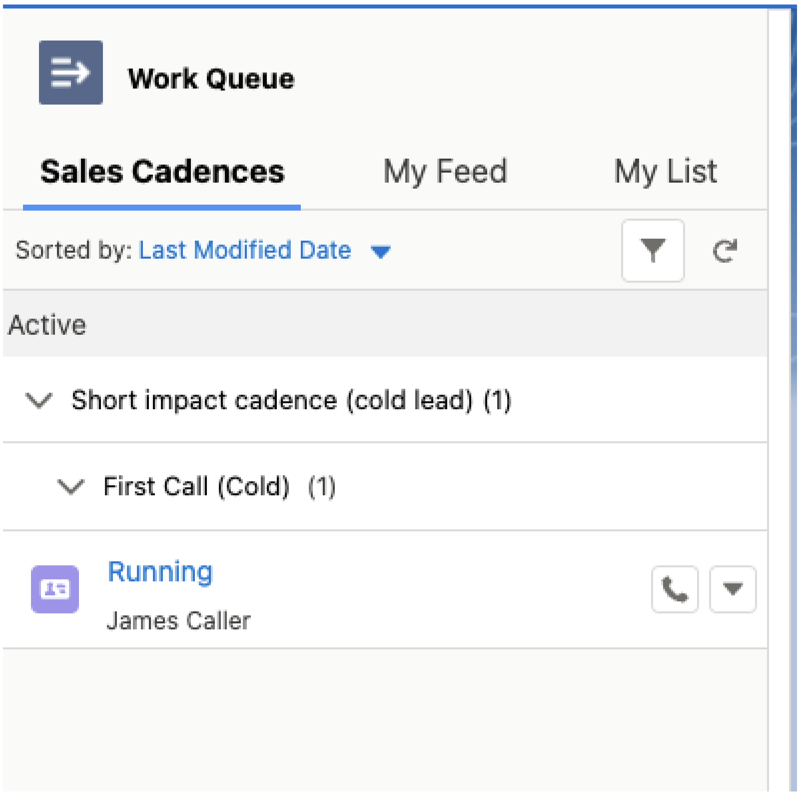
[1] Note **Opportunities** can also be added to a Sales Cadence



and click **Add to Sales Cadence** to add the Contact to a sales cadence:



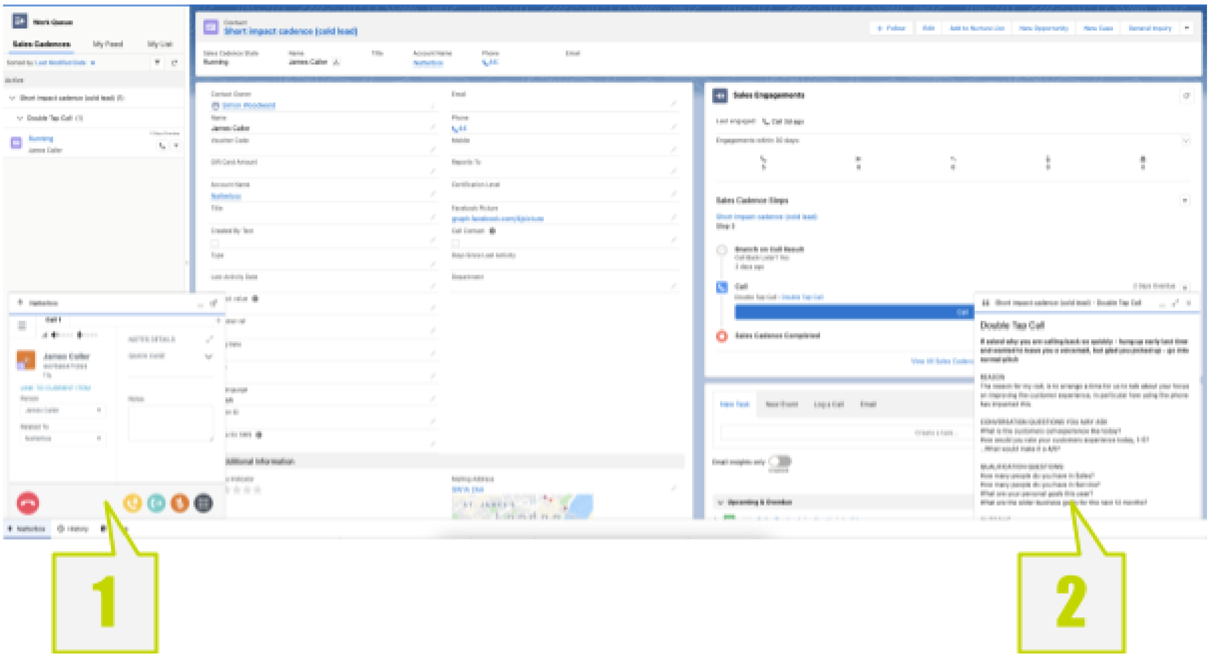
Upon clicking **Add**, a cadence step now appears in the **Work Queue** on the left side of the screen:



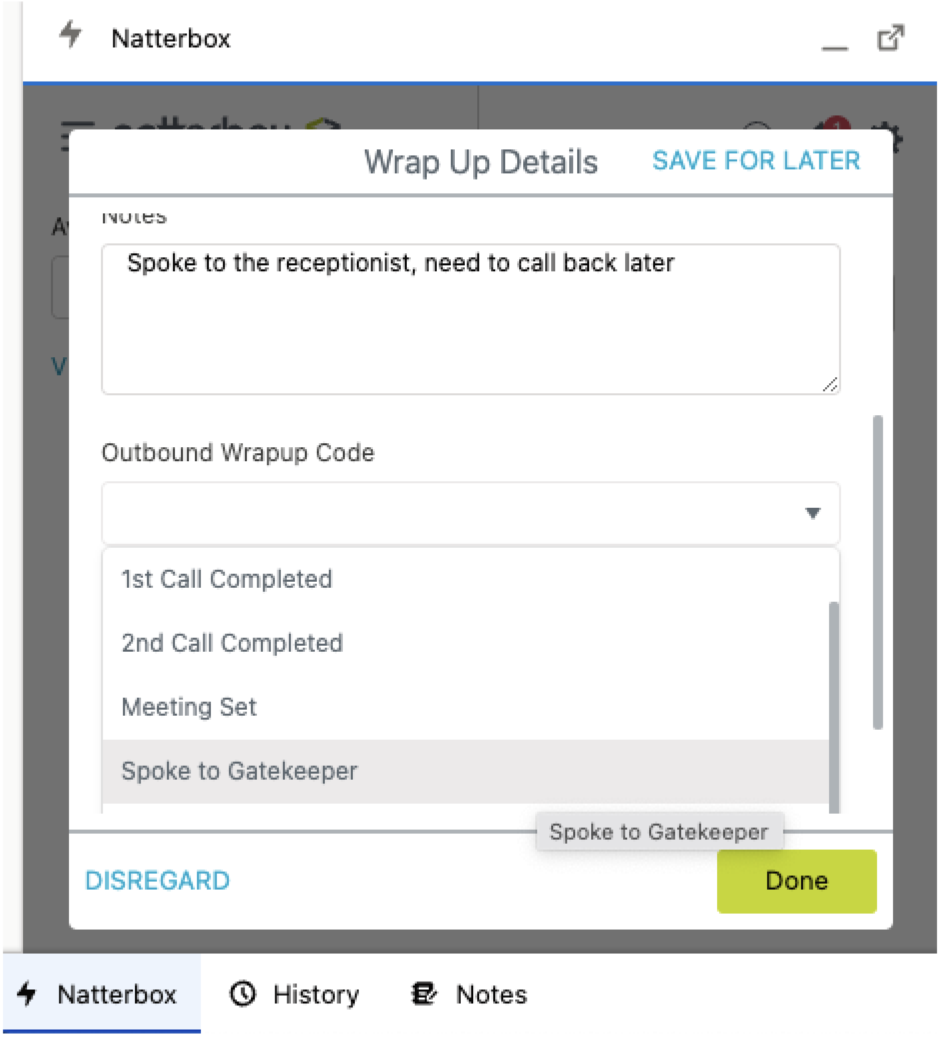
Hovering over the phone icon shows the user that they can **Click to Dial** the number.

Clicking this icon will initiate a call from Natterbox:

1. Natterbox Freedom: here the user can make notes that will then be saved against the task in Salesforce
2. A Call Script will appear (if one has been created in the Salesforce Call Script object and assigned to the cadence step) here

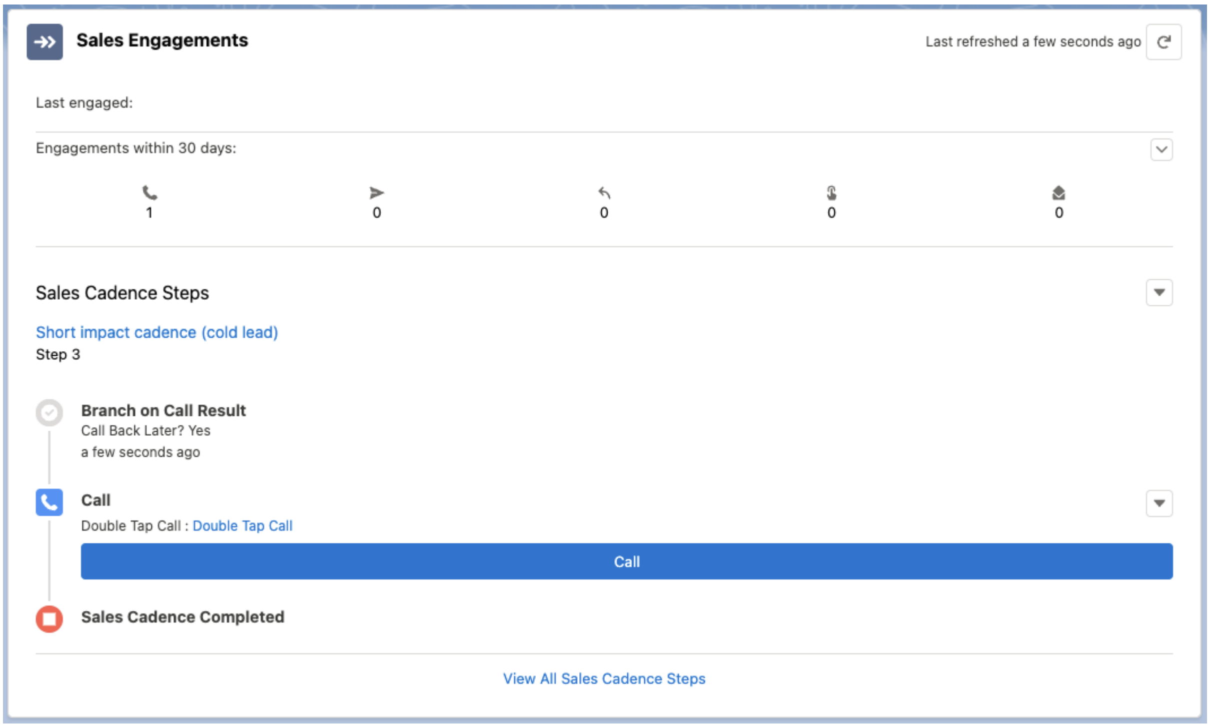

1
2

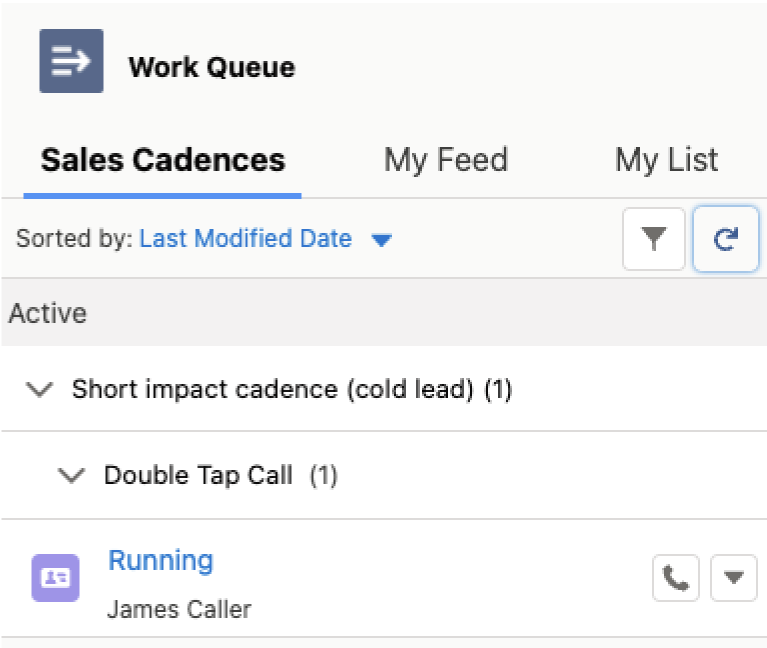
Once the call has ended, the user is presented with the Natterbox **Wrap-Up codes**:



If the user chooses “Spoke to Gatekeeper” this will:

- Be logged as a **Task** in Salesforce
- Be mapped to the **Call Result**, “Call Back Later”
- Move to **Double Tap Call** as the next step in the sales cadence





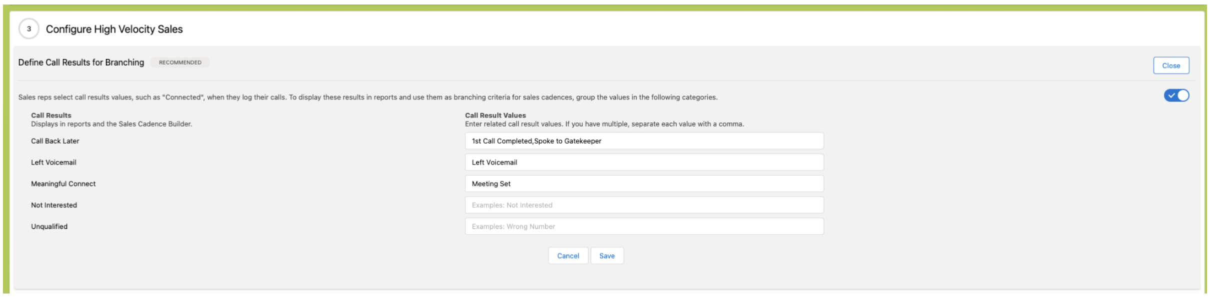
If the user had selected a different **Wrap-Up code** this would instead have gone to the other action of "Manual email send".

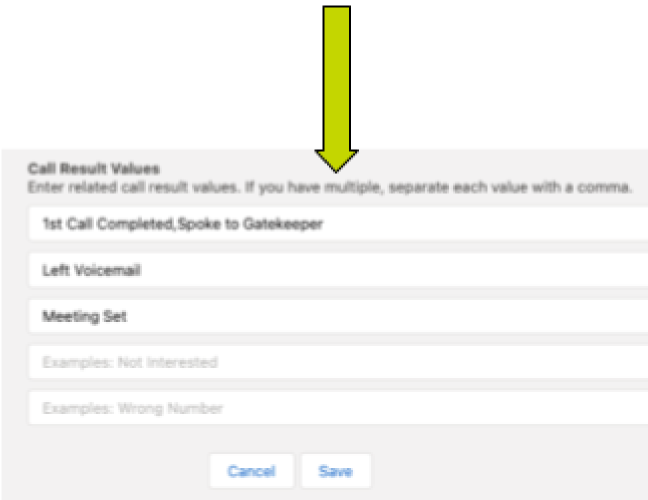
Troubleshooting

The next step of the sales cadence doesn't appear in Work Queue after I've selected a Wrap-Up code

In Step 3 of the High Velocity Sales setup wizard, please make sure you've entered the **Wrap Up code** exactly as it appears in Natterbox.

If you want more than one **Wrap Up code** to map to a **Call Result**, make sure these are separated by commas, with a space after each comma





If either of these steps are not followed, the next step will not appear in the Work Queue