

High Velocity Sales with Natterbox: Guide for Admins

Contents

Introduction to High Velocity Sales

 Setting Up

 Licence prerequisites

 Salesforce

 Natterbox

 Technical prerequisites

 Natterbox

 Salesforce High Velocity Sales

 Hardware

 Audio equipment

 Web Browser

 Salesforce version

 Web RTC

Troubleshooting

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





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 <u>Salesforce High Velocity Sales Implementation guide</u> 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 - <u>see here</u>

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: <u>https://test.webrtc.org/</u>

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





Steps to be completed during setup

Once you've completed the steps from the <u>Salesforce High Velocity Sales</u> <u>Implementation guide</u>, 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:

3 Configure High Velocity Sales	
Define Call Results for Branching HELEANNER	
Sales reps select call results values, such as "Connected", when they leg their calls. To display these results in reports and use them as it	ranching oritania for sales radences, group the values in the following nategories.
Call Results Displays in reports and the Sales Cadence Builder.	Gall Besuit Values Entar related call result values. If pou have multiple, separate each value with a comma.
Call Back Later	fet Call Completed,Spoke to Gotokweper
Left Voicemail	Left Voicemeil
Misaninghal Connect	Monting Set
Net Interested	Examples: Not Interested
Unqualified	Escreptes: Wang Number
	Canoel Save





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 Existin	g 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



➡ Work Queue	Contact Short impact cadence (cold lead)			+ Follow Edit Add to Nurture List	New Opportunity New Case	General Inquiry
Sales Cadences My Feed My List						
Sorted by: Last Modified Date 💌 🍸 C ⁴	Sales Cadence State Name Title Account N Running James Caller A Natterbo	ame Phone Email				
Active					16 - WIL (// / / // / / // / / // / / // / / // / / // / / / / // / / / // / / / / / / / / / / / / / / / / / / /	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
\checkmark Short impact cadence (cold lead) (1)	Contact Owner	Email	Sales Engagements			C
✓ Double Tap Call (1)	Name James Caller	Phone t. 44	Last engaged: 📞 Call 3d ago			
Aunning 2 Days Overdue	Voucher Code	Mobile	Engagements within 30 days:			V
	Gift Card Amount	Reports To	€ > 0	4°, O	5 0	2 0
	Account Name Natterbox	Certification Level	Salas Cadonas Stors			
	Title	Facebook Picture //	Short impact cadence (cold lead)			
	Created By Text	Call Contact	Step 3			
	Tree	Dros Siese Last Astivity	Branch on Call Result			
	1924	Days drifte Last Activity	Call Back Later? Yes 3 days ago			
	Last Activity Date	Department	D 0:#			2 Dave Ovacrius
	Contact value		Double Tap Call : Double Tap Call			2 bays overage
	/			Call		
	Customer ref					
* Natterbox	_ G ^a) Date		Sales Cadence Completed			
= notterbox a	A 0			View All Sales Cadence Steps		
Availability Keypad Dial	anguage					
In Meeting Q. Search name	I sh		New Task New Event Log a Call Ema	ail		
VIEW CALL LOGS	· · · · · · · · · · · · · · · · · · ·					
1 <u>2</u>	3 of or SMS 0			Create a task		Add
4 5	6 dditional Information		Email insights only		Eiters All time - All	astivities - All turnes
7 9	9 v Infeator	Mailinn Arlehase	Disabled			
PQRS TUY	WXYZ	SW1A 2AA			Refre	esh • Expand All • View All
* 0	#	ST. JAMES'S	V Upcoming & Overdue			
		London Statiet Contra	Call - To check in after their holiday			14-Oct 💌
Dial Rec	101	Buckongham Palace	> (a) Call - To close			06-Oct 💌

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

Reports To		قر 0	> 0 ×	б 0
Add to Sal Keep track of the next ema A record can be added to or	les Cadence ill or call with a sales cadence. Ny one sales cadence at a time.			
Sales Cadence Solet Timpact cadence (cold lead) X	Sales Cadence Creator Simon Woodward			Add to Sales Cadence
Target Assignee Record owner Me Me Another High Velocity Sales user	Last Modified Simon Woodward, 8/24/2021, 5 Description A one/two day cadence for a ne	::30 PM sw lead/prospect who does not know mu	ch about us	Create a task
Related opportunity Search opportunities	٩		Add Cancel	
		✓ Upcoming & Overdue		

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



⇒ Work Queue		
Sales Cadences	My Feed	My List
Sorted by: Last Modified Date	e 🔻	T C
Active		
✓ Short impact cadence	(cold lead) (1)	
✓ First Call (Cold) (1)		
Lames Caller		۹. 💌

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





Editor Castoners May Proceedings	e nyse ¥ p	Struct Impact cadence (cald lead) Ima Cablor Tols Raming Americation & Tol	Accurrant from the		a false	AR ARTIST	the Res Sportally	See Loss	leveral tracks	
infer .										_
V Direct impact anderson (solid lead) (0	(3 Sman Roochant		Todes Engagements						a
V Double Tay Gall (1)		North Annual Color	From Control of Contro	Last sequent 15, that the set						
C Annual Contract	A A	Vessiver Lade	tanin .	Engagements estimin 10 days						
James Caller		Officiant Amount	/ Bacch Te	v		5				
				*						
		Notestan States	/	2 Address of Designations						
		Tite	Facularity Robert	Continued astrony bold had						
		Emoted By Text	fal instant 🙂	The T						
			× 11	- Branch on Ead Basel						
		1.04	/	Coal Block (unter 1 No. 3 dept age						
		Last deficitly lines	/ Baston	/ C1 Cat						1.1
* Inteller		- of state #		South Review Review			that input sales and	inal - Brain Tay	ia	18
		+ percel				Carl Do	able Tao Call			
	NOTE 1414-1	(Cales Cadence Completed			and any yes are calling inst	tree spinkley : have	and setting	104
James Coller	dente const	v			100	off Dates Cashers Mart	wantani ka kaswa pisu ia wakia mali pilikuk	met, but plot unv	004610-0	,,
Th.				_			104			
Unit To CLARGE TIME		a constant and a constant				114	researcher my risk, is he arrent fahre die Die outfieller angeh	eros, inperioder	hale obtained proof higher pairing from	phone -
Annalais +				New York AmeriCante Logis C	at that	har-	impactant this			
Append to		111 INT #			0	and the second s	VENUMBER OF STREET	NOT BETORN?		
10000		1					another one rate processions are acuted material to \$707	ri, angariana kula	6,110	
		Altional Information		Enall insights only		9.0	A CANON BELL'OND			
		is the second	NUMPERATION DATE:			100	many people do prochara in many people do prochara in	banket Bancinal		
Ο .	000	0	TAT. AND A TO TA SA	v Operating & Decelor		10	and the state period parts for	uner" unermanentiam	a dia i	
-		-	hand a n					<u> </u>		
Therefore (Therefore)										
1							2			





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

	Wrap Up Details	SAVE FOR LAT
NOTES		
Spoke to the rece	entionist need to call back	later
Spoke to the rect	eptionist, need to can back	later
Outbound Wrapup	Code	
		-
		•
1st Call Complete	d	
2nd Call Complete	ed	
Meeting Set		
Meeting oet		
Spoke to Gatekee	eper	
	Spoke	to Gatekeeper
ISREGARD		Done

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



→ Sales Engagements				Last refreshed a few seconds ago
Last engaged:				
Engagements within 30 days:				\checkmark
قب 1	► 0	÷ ٥	6 0	8 0
Sales Cadence Steps Short impact cadence (cold lead)				•
Step 3				
Branch on Call Result Call Back Later? Yes a few seconds ago				
Call Double Tap Call : Double Tap C	all			
		Call		
Sales Cadence Complete	d			
		View All Sales Cadence Steps		

B Work Queue		
Sales Cadences	My Feed	My List
Sorted by: Last Modified Da	ate 🔻	T C
Active		
✓ Short impact cadence	e (cold lead) (1)	
✓ Double Tap Call (1)	1)	
E Running James Caller		%

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

3 Configure High Velocity Sales					
Define Call Results for Branching					_
				Clos	
Sales reps select call results values, such as "Connected", when they log their o	alls. To display these results in reports and use them as b	ranching criteria for sales cadences, group the values in the following categories.		C	S
Displays in reports and the Sales Cadence Builder.		Can result values Enter related call result values. If you have multiple, separate each value with a comma.			
Call Back Later		1st Call Completed, Spoke to Gatekeeper			
Lett voicemail Meaninchil Connect		Lett votemas			
Not Interested		Recting dec			
Unqualified		Examples: Wrong Number			
		Cancel Save			
	Call Result Values Enter related call result 1st Call Completed, Sp Left Voicemail Meeting Set	values. If you have multiple, separate each value with toke to Gatekeeper	a comma.		
	Examples: Not interes	ted dur			
	Examples: wrong Nun				
		Cancel Save			

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