Getting Your Team Ready for Rhythm

What's changing, how to prepare, and how to support your team through the transition

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Introduction

What is Rhythm?

Rhythm, powered by Salesloft's patent-pending Conductor AI, is a signal-to-action workflow that prioritizes what actions should be taken next based on signals from within Salesloft and your 3rd party integrations.

In other words, Rhythm ensures you're always taking the most important actions to hit your number.

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What to expect

Once your team has access to Rhythm, it will be automatically incorporated into your Salesloft homepage.

All users will benefit from an enhanced user experience. The Salesloft homepage will now include 3 focus zones--Rhythm, Cadences and Close. The specific appearance of your homepage and individual actions will depend on the Salesloft package purchased and the configuration of opportunity field data. (For example, customers with the Deals product will see a Deal Engagement Score icon in their action items.)

(Rhythm will still work even without the recommended configurations, however!)

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The seller's homepage

- Enhanced user interface
- Rhythm, Cadences and Close Focus Zones
- More integrated experience

Prioritized seller actions

- Conductor AI prioritizes seller actions based on deal priority + buyer engagement
- Cadence steps are prioritized based on buyer engagement behavior
- Prioritization takes place in real time

More Cadence capabilities

- New filters and groups
- The ability to run steps for an entire group
- A streamlined Cadences view

The addition of Plays

- Incoming signals (from both Salesloft and 3rd party integrations) can trigger a Play
- Tasks are then created based on the signal and prioritized by Rhythm

Cadences' core functionality

- Sellers will run Cadence steps as before
- No interruption to active Cadences
- No changes to Cadence creation process
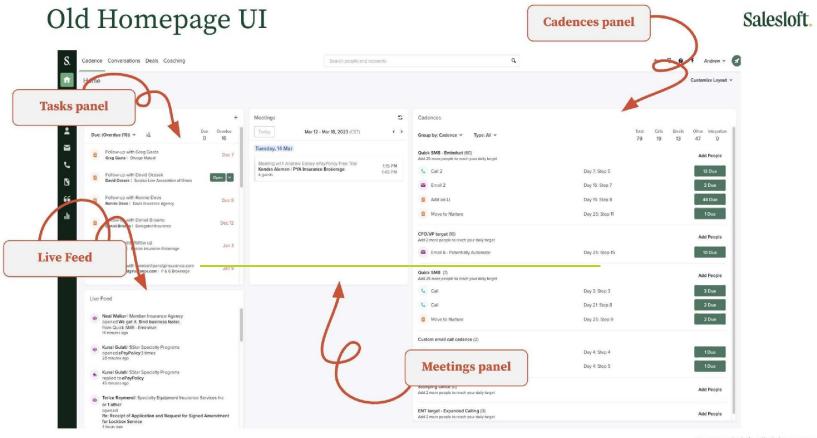
Personal workflow

- Sellers can sort and filter Cadence steps and Actions by due date, action, timezone and more, based on personal preference and work style

User roles + permissions

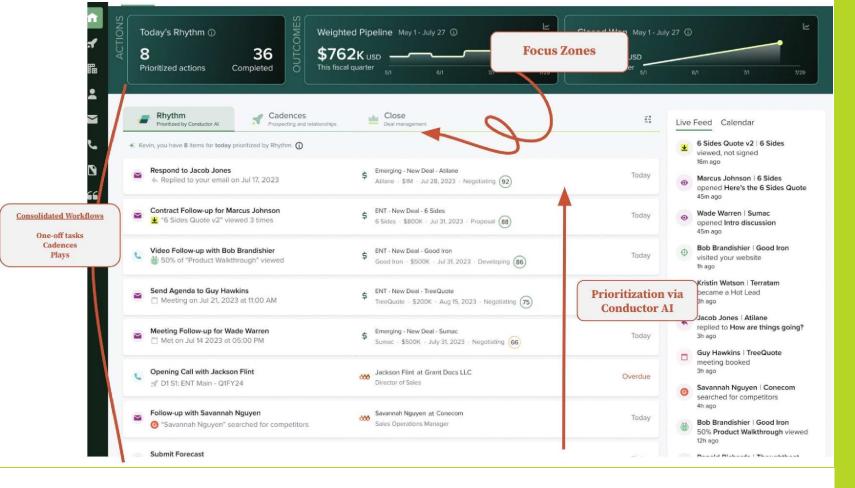- Current role(s) and permission settings are not affected

Automation rules

- Automation Rules are unaffected by Rhythm or Plays

Old Homepage UI

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Cadences panel

Tasks panel

Live Feed

Meetings panel

That was then...

The current Salesloft homepage with Actions + Outcomes dashboard and panels for Tasks, Meetings, Cadences and Live Feed.

The new homepage with Rhythm, Cadences and *Close focus zones, consolidated panels and Action prioritization via Conductor AI.

*Customers without Deals should configure Opportunity field mapping and enable Opportunity Sync for best experience.

Rhythm & Conductor AI

Rhythm, powered by Conductor AI, is a signal-to-action engine.
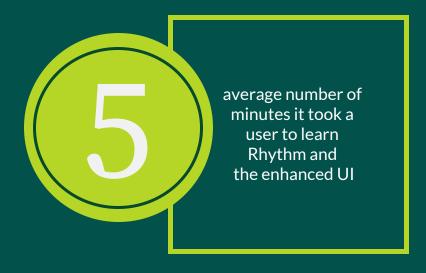
Your benefits:

AI See better outcomes across the full sales cycle.

Conductor AI prioritizes the seller's workflow.

Sellers can meet buyers where they are using signals from across the partner ecosystem.

5 average number of minutes it took a user to learn Rhythm and the enhanced UI

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Would you like to see a brief video (1:20) that explains how Conductor AI works?

Click the Play icon below.

Recommended actions

There are several configurations you will want to enable, in order to maximize the benefits from all that Rhythm has to offer. These configurations can be completed prior to *OR* after Rhythm has been turned on in your instance. Regardless of when you take the recommended actions, Rhythm will still be operational for your team...so don't worry!

Likewise, the basic functionality of your Salesloft instance, including Cadences, will not be affected when your transition to Rhythm takes place.

Read on for our recommendations based on package and permission status (User or Admin).

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Do you have Deals as part of your package?

We recommend that Admins confirm proper configuration of their CRM and Deals. You may have taken the steps in this checklist already, but in case you haven't (or if you need a refresher) we've included links to how-to articles for each tip.

- ☑ Confirm Salesloft and CRM sync (for Salesforce and Dynamics CRM users). Need help?

- ☑ Map Opportunity fields, including Deal Amount. Need help?

- ☑ Align Opportunity stages. Need help?

- ☑ Map CRM users in the User Management table. Need help?

- ☑ Consider removing People from archived Cadences so that you have a "fresh start" to manage prioritized tasks in Rhythm. Need help?

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Don't have Deals? Rhythm can utilize your synced Opportunity data.

We recommend that Admins confirm proper configuration of their CRM and Opportunity fields. You may have taken these steps already, but in case you haven't (or need a refresher) we've included links to how-to articles for each tip.

- ☑ Confirm Salesloft and CRM sync. <u>Need help</u>?

- ☑ Map the following Opportunity fields to allow Rhythm to prioritize tasks by open opportunity: Amount, Stage, Probability, Close Date, Created by CRM ID, and Created Date. <u>Need help</u>?

- ☑ Align Opportunity stages to stages in your CRM. <u>Need help</u>?

- ☑ Map CRM users in the User Management table. <u>Need help?</u>

- ☑ Consider removing People from archived Cadences so that you have a "fresh start" to manage prioritized tasks in Rhythm. <u>Need help</u>?

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Are you an end user?

You may have taken the steps in this checklist already, but in case you haven't (or if you need a refresher) we've included links to how-to articles for each tip.

- ☑ Confirm Salesloft and CRM are connected in Personal Settings. Need help?

- ☑ Attend a live "Getting Ready for Rhythm" webinar. See Resources for a link to the webinar schedule.

- ☑ Enable Calendar Sync so that Meetings Reminder and/or Meetings Follow-up Plays can function when booking meetings outside of Salesloft. Need help?

- ☑ Watch this Rhythm "micro-demo"!

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Your Change Management Plan

An effective change management plan will align everyone on the platform changes initiated by the Rhythm launch, including the introduction of Plays, Focus Zones, Conductor AI and our enhanced User Interface.

When talking with your team, be sure to include details about the "what, when and why", with emphasis on these specific benefits:

- Conductor AI focuses sellers on the deals and buyers that are most likely to convert and prioritizes actions and Cadence steps in real time.
- Plays can automatically generate actions in response to signals from buyer and/or seller.
- Integration with CRM and third parties means that sellers can spend their day in one application, reducing unnecessary context switching and disruption to workflow.

Read on for three change management best practice tips...

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1. Create a clear roadmap.

Provide details to stakeholders including when the change will take place, what they can expect, and what resources will be provided to support users through this change.

2. Highlight the benefits.

It takes most users only 5 minutes to learn Rhythm and the enhanced UI! And while core functionality of Salesloft remains the same, Rhythm and Conductor AI will make sellers even more efficient while improving positive outcomes.

3. Communicate often.

Use team meetings, 1:1s, and other forms of internal communication to prepare team for change and point them to Salesloft's many Resources. All customers will receive their scheduled access date at least 30 days prior to transition.

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Resource Page

Live support with role-specific webinars offered several times per week beginning July 20th thru the end of October. Click HERE for a schedule.

Helpful links

Conversations: Resource Guide

Deals: Resource Guide

Confirm Salesloft and CRM Sync

Mapping Opportunity Fields

Edit Opportunity Stage Settings

Rhythm micro-demo (6:02)

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