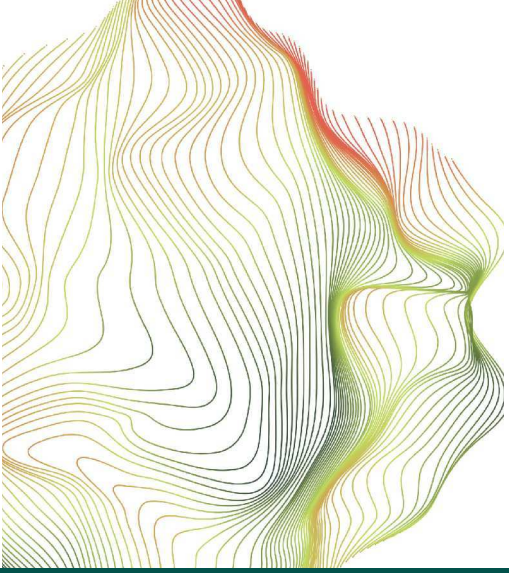


Rhythm for the Salesloft Administrator

*Configuration + Management tips for
optimum functionality*





Rhythm for the Salesloft Administrator

Configuration + Management
tips for optimum functionality

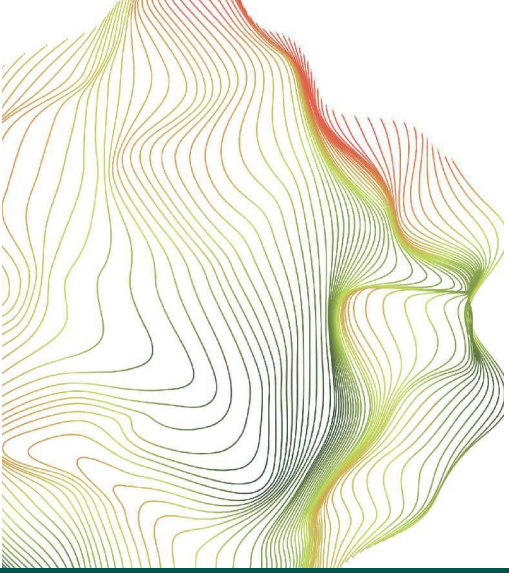
What is Rhythm?

Rhythm, powered by Salesloft's patent-pending Conductor AI, is an enhancement to your Salesloft platform. It functions as 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 that the team is always taking the most important actions to hit their number.

Click on the video icon below to watch a brief video (1:21) that explains how Conductor AI works.





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Will Rhythm work without additional configurations?

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!

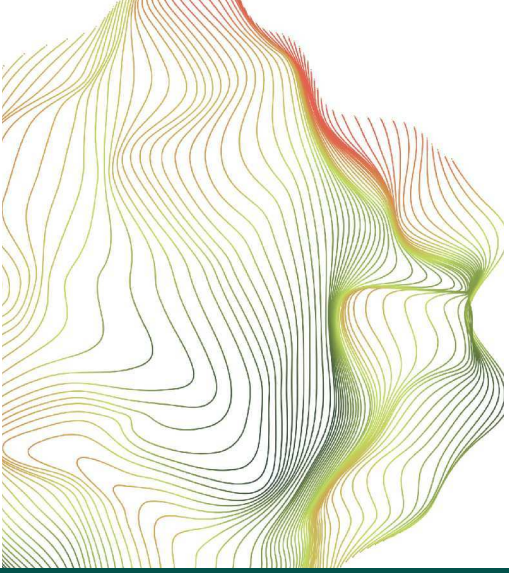
Likewise, the basic functionality of your Salesloft instance, including Cadences, will not be affected when your transition to Rhythm takes place.

What are the benefits of Rhythm to my team?

Rhythm creates outcome-driven, revenue-generating sales organizations that triumph across the full sales cycle. By leveraging powerful artificial intelligence and signals from partner integrations, **Rhythm turns buyer behavior into seller action in a single, prioritized workflow that is customized to the user.**

Powered by Conductor AI, Rhythm prioritizes your seller's workflow based on *buyer engagement* and *deal priority*, **enabling your sellers to focus their time on the actions that yield the best outcomes.** Conductor AI is continuously "learning" how seller actions are influencing outcomes--in real time. **As Rhythm gets smarter, your sellers's workflow does too.**

Plays **automatically convert buyer actions into best practice actions for sellers** then prioritizes these actions in the seller's workflow in real time (e.g., Meeting Reminder plays).



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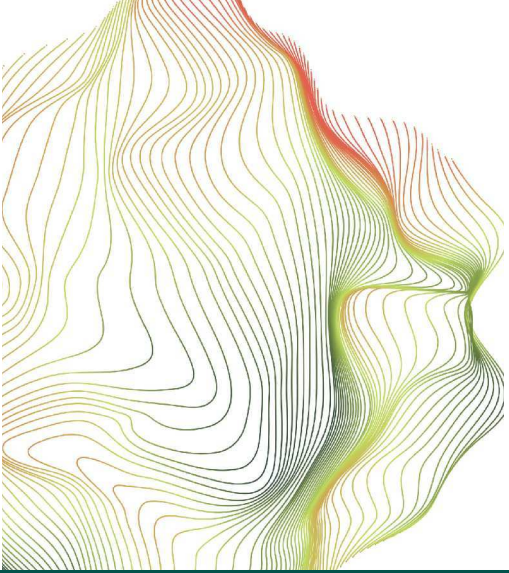
What changes should I expect?

Enhancements to the user's experience will depend upon the package purchased by your organization. (For example, users with the Deals product will see a Deal Engagement Score next to action items in the Rhythm focus zone.)

All users will get a streamlined homepage, action prioritization by Rhythm, the addition of Plays, and faster Cadence step completion with less clicks.

What do I need to do as an Administrator?

- Prepare users and stakeholders for the transition to Rhythm
- Read on to enable Plays and confirm configurations based on package
- Attend our live webinar "Rhythm Configuration & Management" offered three times per week (See [Schedule](#))
- Check out the "Getting Ready for Rhythm" job aid found [HERE](#)



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Plays

Plays help your sales team stay on top of sales activities and close deals by automatically generating seller actions based on incoming signals.

Create Play

5 Plays

Search by Play Name or Signal

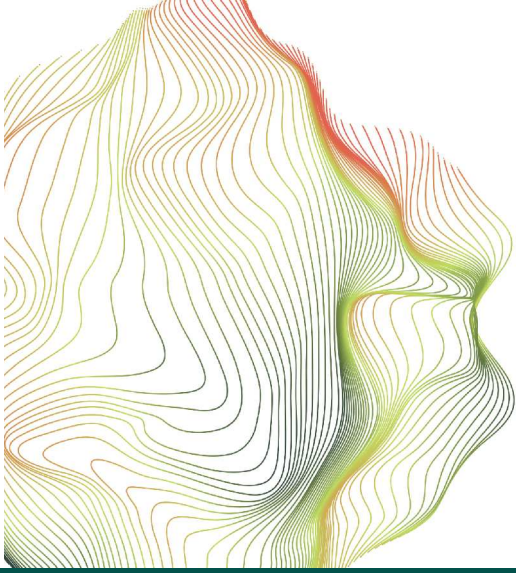
Play Name	Signal/Action	Last Updated	
<input checked="" type="checkbox"/> Meeting Follow-up	When meeting is completed email	Jul 17, 2023, 3:49 PM	...
<input checked="" type="checkbox"/> Meeting Follow-up + Recording	When meeting is completed AND Recordin... email	Jun 21, 2023, 1:52 AM	...
<input checked="" type="checkbox"/> Meeting Follow-up + Action Items	When meeting is completed AND Recordin... email	Jun 21, 2023, 1:52 AM	...
<input checked="" type="checkbox"/> Email Follow-up	When an email reply is received email	Jun 21, 2023, 1:52 AM	...
<input checked="" type="checkbox"/> Meeting Reminder	When meeting is booked email	Jun 20, 2023, 8:27 PM	...

What is a Play?

Plays automatically convert incoming signals from partner integrations into actions for your sellers. For example, if "Meeting Reminder" is enabled, a seller will see an Action in their Rhythm focus zone prompting them to send a templated email message to the customer prior to the scheduled meeting date and time.

Plays can be created from scratch or from a framework (like Cadences). There are currently five (5) Plays that have already been created for you, however more will be added over time. Admins can enable all Plays or select them individually.

To enable Plays, go to Team Settings > Play and enable by toggling the blue button.



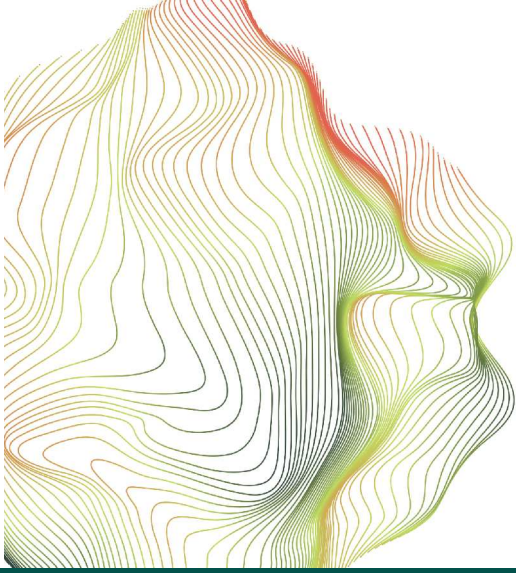
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Does your Salesloft instance include Deals?

As a best practice, Salesloft recommends 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) there are links to Knowledge Base articles following each tip.

- Enable Opportunity sync in Team Admin settings** (available for Salesforce and MS Dynamics CRM customers) [🔗](#)
- Bi-directionally map the following Opportunity fields: Close date, amount, probability, stage, Created by CRM ID, Created Date** [🔗](#)
- Align Opportunity Stages** [🔗](#)
- Enable CRM Sync** [🔗](#)
- Map CRM users in the User Management table** [🔗](#)



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

As a best practice, Salesloft recommends 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) there are links to Knowledge Base articles following each tip.

- Confirm Opportunity sync in Team Admin settings [🔗](#)

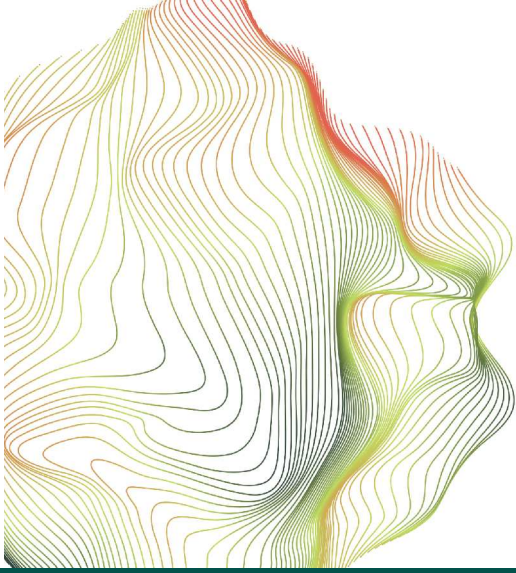
- Map the following Opportunity fields to allow Rhythm to prioritize tasks by open opportunity: [🔗](#)
 - Amount
 - Stage
 - Probability
 - Close Date
 - Created by CRM ID
 - Created Date

- Align Opportunity Stages [🔗](#)

- Enable CRM Sync [🔗](#)

- Map CRM users in the User Management table [🔗](#)

** Link to related article in Salesloft's Knowledge Base is indicated by [🔗](#) symbol.




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How do I enable partner integrations?

Salesloft's Integrations expand the capabilities of your Revenue Workflow Platform. To enable partner integrations, open Team Settings > Integrations and toggle individual integrations ON.

Click the video icon (right) to see a .gif demo 

Additional Resources for Admins

Rhythm Configuration & Management webinars
(Every T/Th @ 3pm EST and Wed @ 10am ET each week)

Salesloft Admin Guides found [HERE](#)

Get certified as a Salesloft Administrator!
More information [HERE](#)