



Salesloft
Rhythm
for
Sellers

Salesloft.

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.



The Salesloft homepage now provides 3 Focus Zones



Rhythm

Prioritized by Conductor AI



Cadences

Prospecting and relationships



Close

Deal management

The **Rhythm Focus Zone** synthesizes all of the things you *could* do today and prioritizes them in a way to help you consistently achieve your goals.

The **Cadences Focus Zone** is similar to today's Salesloft experience, providing you the same structure for high-volume, outbound execution. Within each Cadence step (or group), tasks are prioritized by Conductor AI ensuring your most engaged contacts are served first.

The ***Close Focus Zone** prioritizes closing workflows by the deals most likely to close, ideal for those last few days of the month when moving deals across the finish line is most critical.

*Customers without Deals should configure Opportunity field mapping and enable Opportunity Sync

The Rhythm Focus Zone

Cadence steps, Play actions, and one-off tasks are prioritized by Conductor AI with your most high-value task listed at the top.

To open an Action in the Rhythm focus zone, simply click on it.

You're automatically re-directed to the page where you can complete the Action, with fewer clicks!

Filter actions by due date, task type and time zone

Workflow Conversations Deals Coaching Search people and accounts Kevin v +

ACTIONS Today's Rhythm 8 Prioritized actions 36 Completed

OUTCOMES Weighted Pipeline May 1 - July 27 \$762K USD This fiscal quarter

Closed Won May 1 - July 27 \$340K USD This fiscal quarter

Rhythm Prioritized by Conductor AI

Cadences Prospecting and relationships

Close Deal management

Kevin, you have 8 items for today prioritized by Rhythm.

- Respond to Jacob Jones Replied to your email on Jul 17, 2023
- Contract Follow-up for Marcus Johnson "6 Sides Quote v2" viewed 3 times
- Video Follow-up with Bob Brandishier 50% of "Product Walkthrough" viewed
- Send Agenda to Guy Hawkins Meeting on Jul 21, 2023 at 11:00 AM
- Meeting Follow-up for Wade Warren Met on Jul 14 2023 at 05:00 PM

Filter Options Clear All

Due By Today and Overdue

Task Type All Actions

Filter

✓ All Actions

- General
- Email
- Call
- Text
- Ask for Introduction

Live Feed Calendar

- 6 Sides Quote v2 | 6 Sides viewed, not signed 16m ago
- Marcus Johnson | 6 Sides opened Here's the 6 Sides Quote 45m ago
- Wade Warren | Sumac opened Intro discussion 45m ago
- Bob Brandishier | Good Iron visited your website 1h ago
- Kristin Watson | Terratam became a Hot Lead 3h ago
- Jacob Jones | Atliane replied to How are things going? 3h ago
- Guy Hawkins | TreeQuote

The Cadences Focus Zone

Cadences are consolidated under one view, giving you the ability to run an entire Cadence.

Cadences are differentiated by Inbound, Outbound, Event and Other; steps are prioritized by Conductor AI based on customer engagement.

You can preview Cadence step groups and filter across timeframes (overdue, today, next week, etc.).

Workflow Conversations Deals Coaching

Search people and accounts

412 Prioritized actions 2 Completed

2K This Month

37 This Month

Rhythm Prioritized by Conductor AI

Cadences Prospecting and Relationships

Close Deal management

Today and Overdue grouped by Cadence Step

Inbound Lead Follow-Up (Contact Us Form) Team Inbound 10 35 64

HOLD STEP FOR PPL IN STEP 1 (EMAIL) Day 1: Step 3

Email 2 - Email Bump Day 3: Step 6: A

Call 2 - Call (No Voicemail) Day 3: Step 5

Email 4 - Bump New Thread Day 10: Step 8

Email 4 - Bump New Thread Day 10: Step 8

Call 3 - Call (No Voicemail) Day 40: Step 9

Filters

View Options Clear All

Group By

Cadence Step

Filter Options

Due By

Today and Overdue

Task Type

All Actions

Time Zone

All Time Zones

The Close Focus Zone

Workflow is prioritized by the deals most likely to close.

Action cards in the Close zone are focused on moving deals across the finish line.

To complete an action, click on the card (example, "A"). You're automatically re-directed to the appropriate People page to complete that Action.

** Customers without Deals may have different view; Salesloft recommends enabling Opportunity Sync and mapping Opportunity fields

The screenshot displays the Salesloft interface, specifically the 'Close' focus zone. At the top, there's a navigation bar with 'Workflow', 'Conversations', 'Deals', and 'Coaching'. A search bar is also present. Below the navigation bar, there are three summary cards: 'Today's Rhythm' (8 Prioritized actions, 36 Completed), 'Weighted Pipeline' (\$762k USD, This fiscal quarter), and 'Closed Won' (\$340k USD, This fiscal quarter). A central navigation bar highlights the 'Close Deal management' tab. Below this, there's a list of action cards. The first card, 'Respond to Jacob Jones', is highlighted in green and marked with a green circle containing the letter 'A'. Other cards include 'Contract Follow-up for Marcus Johnson', 'Video Follow-up with Bob Brandishier', 'Send Agenda to Guy Hawkins', and 'Meeting Follow-up for Wade Warren'.



Q: If I don't have Deals, will Rhythm and Conductor AI still work for me?

Answer:

Yes! Conductor AI and Rhythm are available to all customers. Rhythm will utilize opportunity sync data for Customers without our Deals product. If opportunity fields are not mapped and synced with the CRM, actions in the Close Focus Zone will not contain opportunity data.

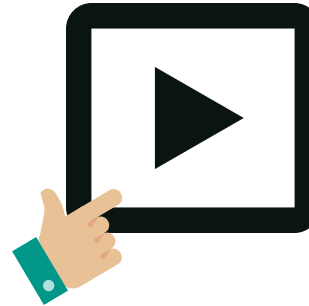
**Salesloft recommends mapping opportunity field data and enabling opportunity sync for non-Deals customers. Customers with Deals must configure Amount field.

Q: How does Rhythm prioritize my workflow?

Answer:

Actions are prioritized by deal importance and lead readiness. Rhythm then prioritizes these actions into the Workflow you see in your Rhythm, Cadences and Close focus zones, with the highest valued action listed first.

Click on the video icon below to watch a brief video (1:20) demonstrating how Conductor AI powers Rhythm!



**Salesloft recommends mapping opportunity field data and enabling opportunity sync for non-Deals customers. Customers with Deals must configure Amount field.

Anatomy of an Action

The screenshot displays a CRM interface with three main sections: **Rhythm** (Prioritized by Conductor AI), **Cadences** (Prospecting and relationships), and **Close** (Deal management). A notification at the top states: "Kevin, you have 8 items for today prioritized by Rhythm." The main list of actions includes:

- Respond to Jacob Jones** (Action icon) - Replied to your email on Jul 17, 2023
- Contract Follow-up for Marcus Johnson** (Action icon) - "6 Sides Quote v2" viewed 3 times
- Send Agenda to Guy Hawkins** (Action icon) - Meeting on Jul 21, 2023 at 11:00 AM

A red arrow points from the text "the 'signal'" to the "Respond to Jacob Jones" action. Another red arrow points from the text "Click the \$ icon to open the Opportunity Priority 'Key Factors'" to a green circle with a white dollar sign (\$) icon. This icon is associated with the opportunity "Emerging - New Deal - Atilane" (Atilane - \$1M · Jul 28, 2023 · Negotiating) which has a score of 92. A red-bordered box provides details for this opportunity:

Opportunity Priority for
Emerging - New Deal - Atilane

Key Factors

- 92 Deal Engagement Score
- Jan 30, 2023
- \$1M
- Negotiating (76%)

Powered by ConductorAI.

The
"action"

the "signal"

Anatomy of an Action

The screenshot displays a CRM interface with three main sections: **Rhythm** (Prioritized by Conductor AI), **Cadences** (Prospecting and relationships), and **Close** (Deal management). A notification at the top states: "Kevin, you have 8 items for today prioritized by Rhythm." The main list contains the following items:

- Respond to Jacob Jones** (Email icon): Replied to your email on Jul 17, 2023. Deal: Emerging - New Deal - Atilane (\$1M, Jul 28, 2023, Negotiating) with a score of 92.
- Contract Follow-up for Marcus Johnson** (Email icon): "6 Sides Quote v2" viewed 3 times. Deal: ENT - New Deal - 6 Sides (\$800K, Jul 28, 2023, Negotiating) with a score of 92. A **Deal priority** popup is shown for this item, listing key factors: "Closes in 5 days, 7/28/2023", "\$1M Contract", and "55 day avg. sales cycle".
- Video Follow-up with Bob Brandishier** (Video icon): 50% of "Product Walkthrough" viewed. Deal: ENT - New Deal - Good Iron (\$500K, Jul 28, 2023, Negotiating) with a score of 75.
- Send Agenda to Guy Hawkins** (Email icon): Meeting on Jul 21, 2023 at 11:00 AM. Deal: ENT - New Deal - TreeQuote (\$200K, Aug 15, 2023, Negotiating) with a score of 75.

The "action"

Partner signals

Completing an Email action in the Rhythm Focus Zone

The screenshot shows the Rhythm Focus Zone interface. At the top, there are three tabs: "Rhythm" (Prioritized by Conductor AI), "Cadences" (Prospecting and relationships), and "Close" (Deal management). Below the tabs, a notification states: "Kevin, you have 8 items for today prioritized by Rhythm." A list of items follows, with the first item, "Respond to Jacob Jones", highlighted by a red box. This item includes a reply icon and the text "Replied to your email on Jul 17, 2023". To the right of the item, it shows "Emerging - New Deal - Atlane" and "Atlane - \$1M - Jul 28, 2023". The second item is "Contract Follow-up for Marcus Johnson", showing "ENT - New Deal - 6 Sides" and "6 Sides - \$800K - Jul 31, 2023".

1 Click on the the action item--e.g., *Respond to Jacob Jones*-- to open it. You will be automatically re-directed to Jacob Jones' People page where an email window, addressed to Jacob Jones, is already opened (a).

The screenshot shows the People page for Jacob Jones. On the left, there is a profile card for Jacob Jones, COO at Atlane, with social media icons and a "Quick Actions" section containing icons for Call, Email, Cadence, Meeting, Task, Success, and Message. Below the profile card is a "Stats" section with a table:

Opened	Clicked	Replied
14	4	1

The main content area shows an email window titled "Respond to Jacob Jones" with a red circle 'A' over the title bar. The email content includes a greeting "Hey Jacob," and a paragraph starting with "This should answer your question regarding our discussion last week:" followed by a bulleted list of points. A red circle 'C' is over the first bullet point. The email ends with "Cheers, Kevin" and a signature. At the bottom of the email window, there is a "Complete and Advance" button with a red circle 'D' over it. On the right side of the People page, a sidebar titled "Rhythm" shows a list of action items, with "Respond to Jacob Jones" at the top (marked with a red circle 'B') and "Contract Follow-up for Marcus Johnson" below it (marked with a red circle 'E').

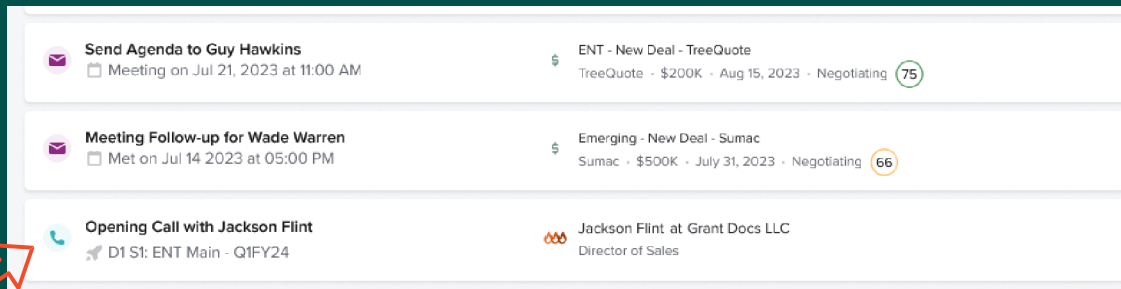
2 The Rhythm Focus Zone follows you and is now a sidebar located on the right. It shows your current action on top, with remaining action items listed underneath (b).

Add your email content, inserting +, Templates, Snippets, or Availability (c) as needed. The People page contains Past Activities (including Recordings, Emails, Notes, etc.) that can be used for context when writing your email.

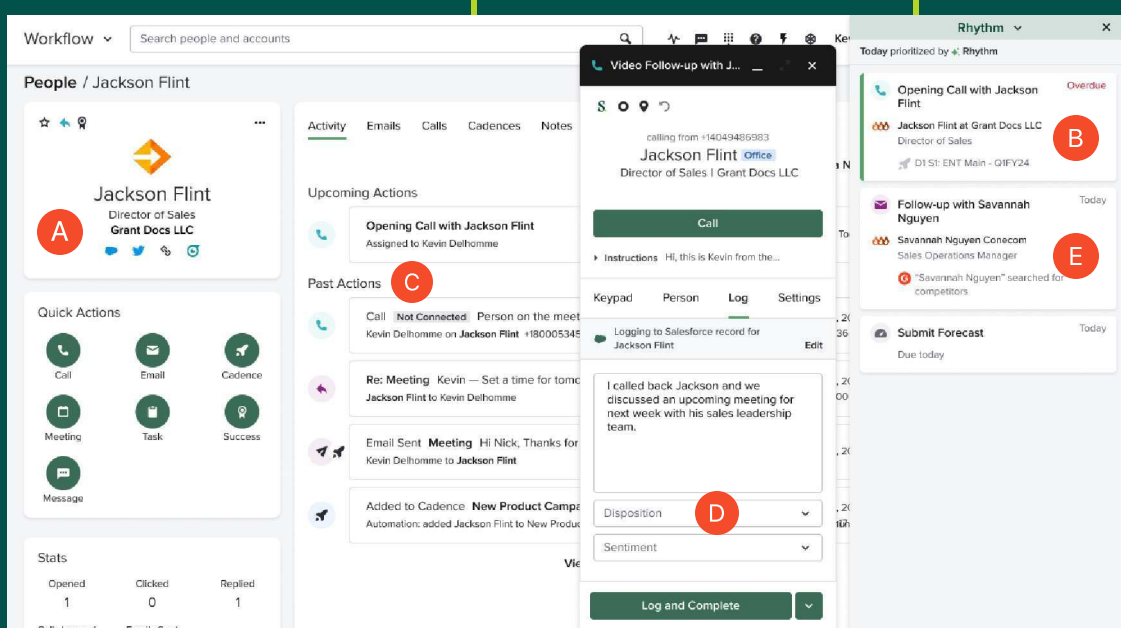
When you're done, click the Complete and Advance button (d) to move automatically to the next action in the Rhythm sidebar--*Contact Follow-up for Marcus Johnson* (e) -which opens automatically in Marcus Johnson's People page.

Completing a Call action in the Rhythm Focus Zone

1 Click on the the action item--e.g., *Opening Call with Jackson Flint*-- in your Rhythm Focus Zone to open it.



2 You will be automatically re-directed to Jackson Flint's People page where you can complete the call (a). The Rhythm sidebar, with remaining action items, is located on the right (b).



Review Past actions prior to making the call, if needed, for context (c). When ready, click the Call button to make your call.

Add your notes and record the Disposition and Sentiment using the drop down menu(s). Click the Log and Complete button to finish (d).

You will be re-directed automatically to the next action item in your Rhythm workflow--*Follow-up with Savannah Nguyen* (e)-- which will open in Savannah's People page.



Q: What are Plays?

Answer:

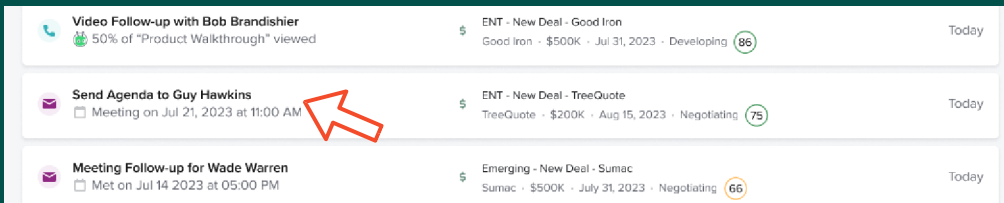
Plays are triggered by a specific buyer and/or seller activity. For example, when you (the Seller) schedule a meeting in Salesloft with a buyer, this will trigger a "Meeting Reminder Play".

The Meeting Reminder Play creates an email task due 24 hours before the scheduled start of the meeting anytime a meeting is booked with a buyer. This task will appear as an action item in your Rhythm Focus Zone.

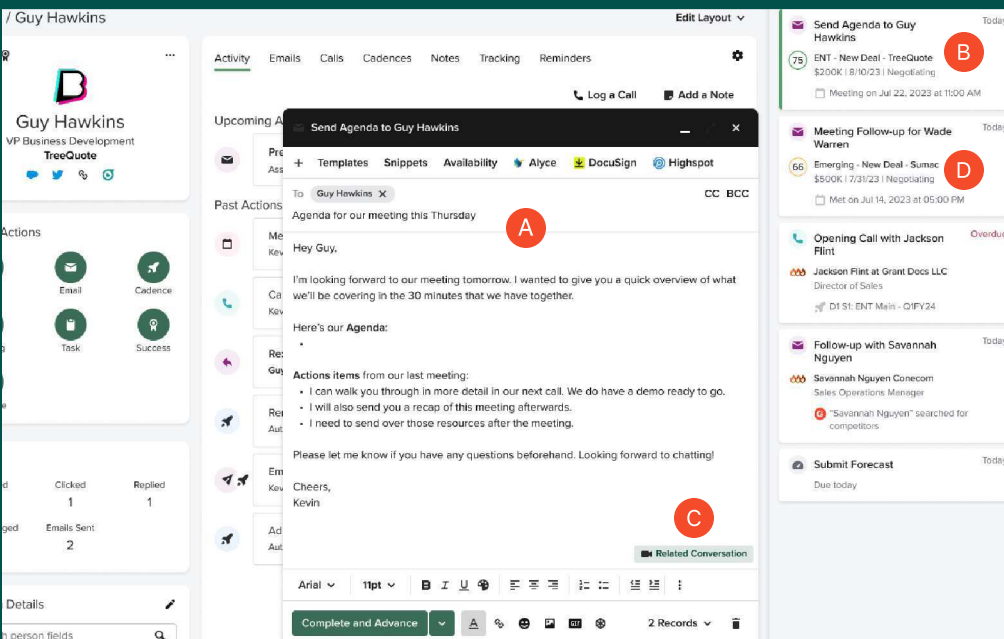
There are currently 5 pre-configured Plays (with more being added). Meeting Play actions utilize customizable email templates which open automatically in the recipient's People page, saving you time and effort.

Plays are created using a Framework; only Salesloft Administrators can create or edit Plays.


Completing a Play action in the Rhythm Focus Zone



1 Click on the the action item--*Send Agenda to Guy Hawkins*-- in your Rhythm Focus Zone to open it. You will be automatically re-directed to Guy Hawkins' People page where an email window with a [customizable] Meeting Agenda template, is already opened (a).



2 The Rhythm Focus Zone follows you to the People Page and is now a sidebar located on the right (b).

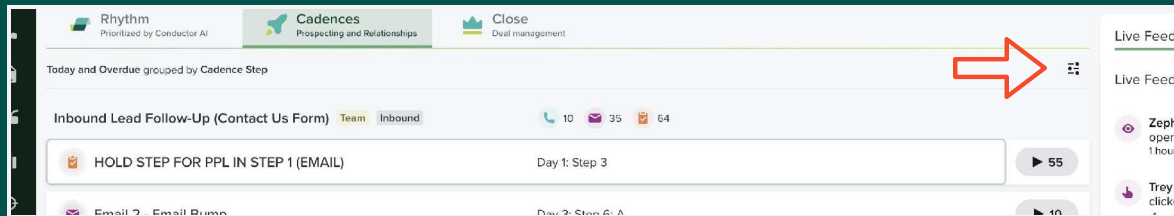
Mr. Hawkins' People page contains Past Actions (including calls, emails and notes) for context. There is also a  Related Conversation button (c) that will open the previous meeting recording complete with transcript, X-rays and Action Items that you can use as a reference when creating your Meeting Agenda.

Once you're ready to send your Agenda email, click the Complete and Advance button at the bottom.

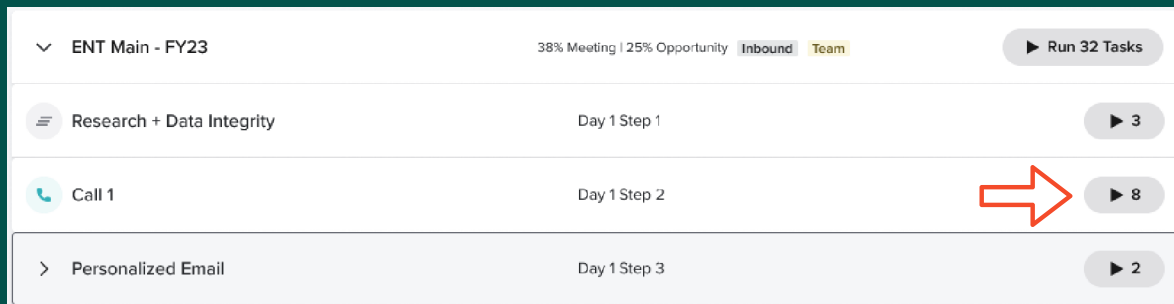
You'll advance to the next action in the Rhythm sidebar-- *Meeting Follow-up for Wade Warren* (d) - which will open automatically in Wade Warren's People page.

Completing a Cadence step in the Cadences Focus Zone

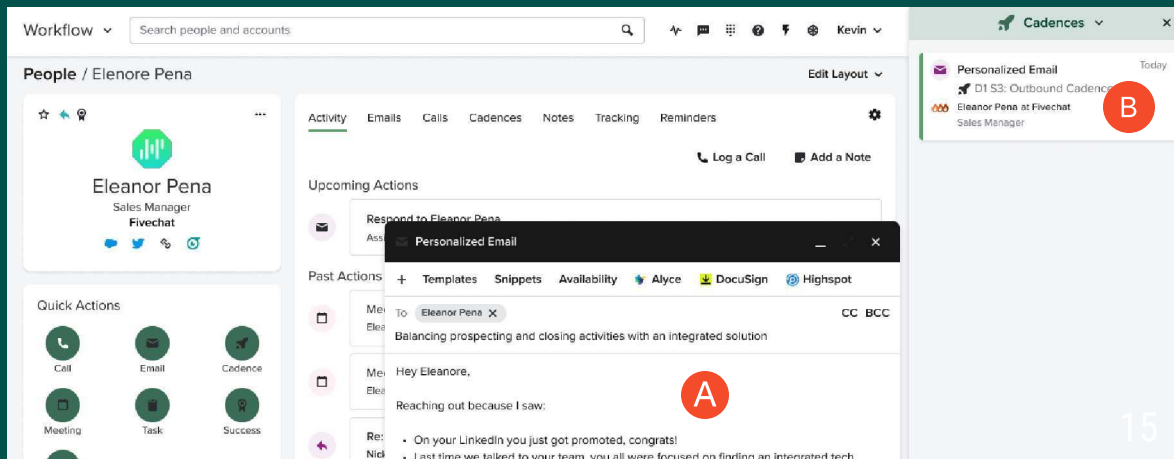
1 You can click on the View Options icon (a) to filter Cadences by Due Date, Task Type and/or Time Zone; or sort by Due Date or Group.



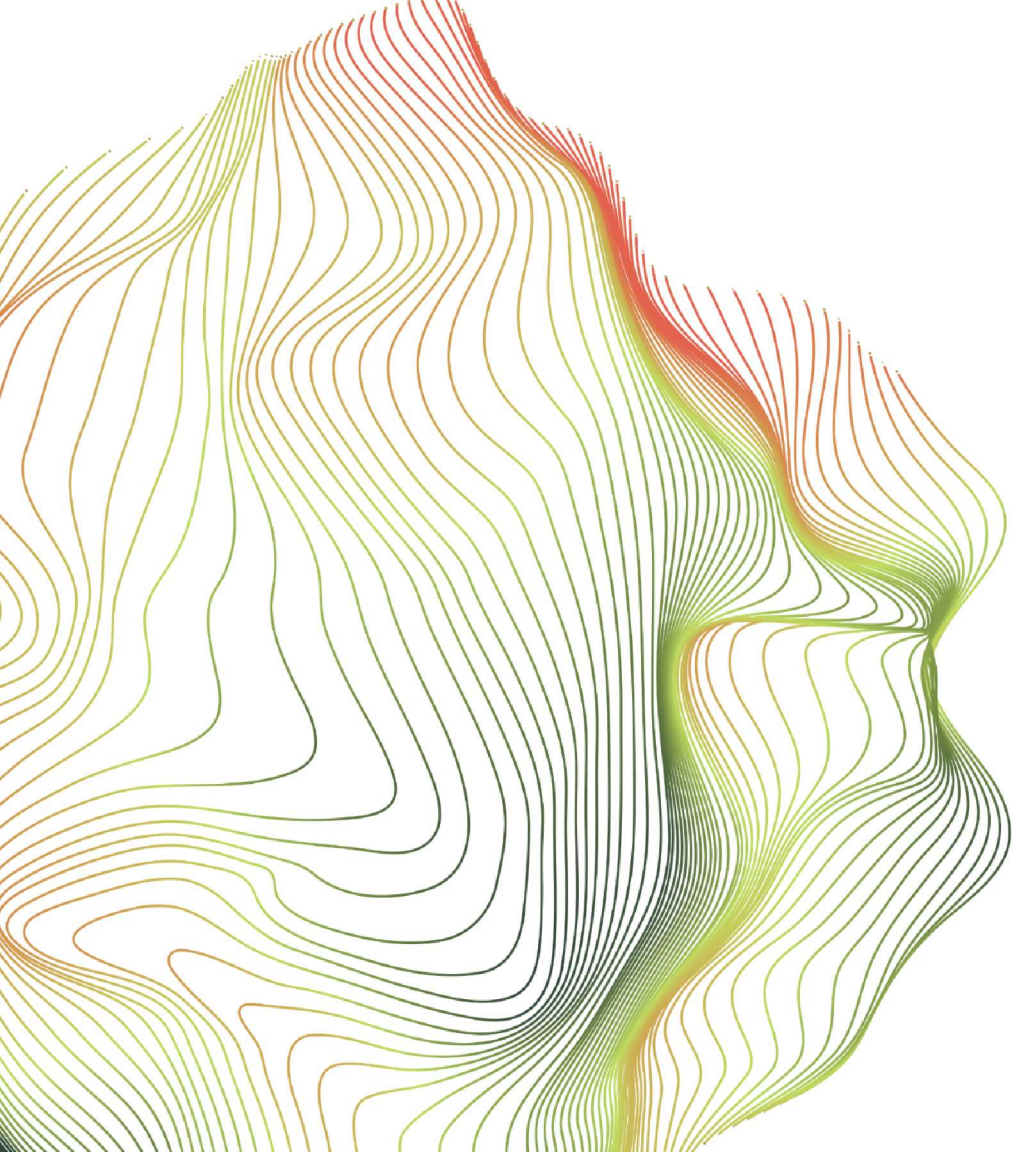
2 All due steps associated with a Cadence will display. To open a step, click the gray button to the right.



3 The step to be completed will open directly in the recipient's People page, along with an email window, Navigator window or dialer pad (if the step is an email, LinkedIn or phone step) (a). The Cadences focus zone will follow you and appear as a side panel on the right (b).



Once you complete the step, you'll automatically be moved to the next step, which will open in that recipient's People page.



Would you like to watch
a six minute demo of Rhythm
in action?

Yes, show me the video!

No, thanks...maybe later?





Resource Page

Live support with role-specific webinars offered several times per week thru the end of October. Click [HERE](#) for a schedule.

Helpful links

[Your Rhythm Workflow](#) article

[Rhythm micro-demo \(6:02\)](#)