Salesloft Rhythm for Sellers

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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.

The Salesloft homepage now provides 3 Focus Zones

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

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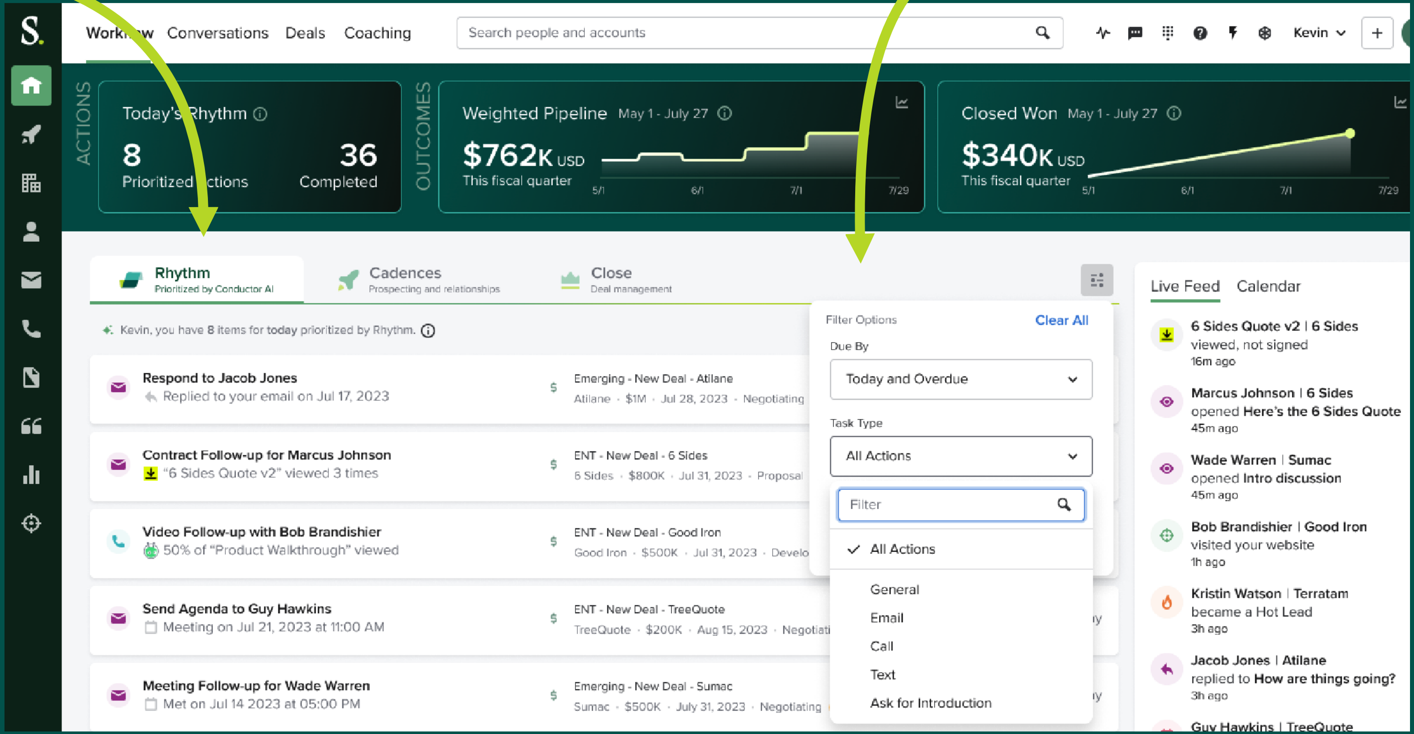
The Rhythm Focus Zone

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



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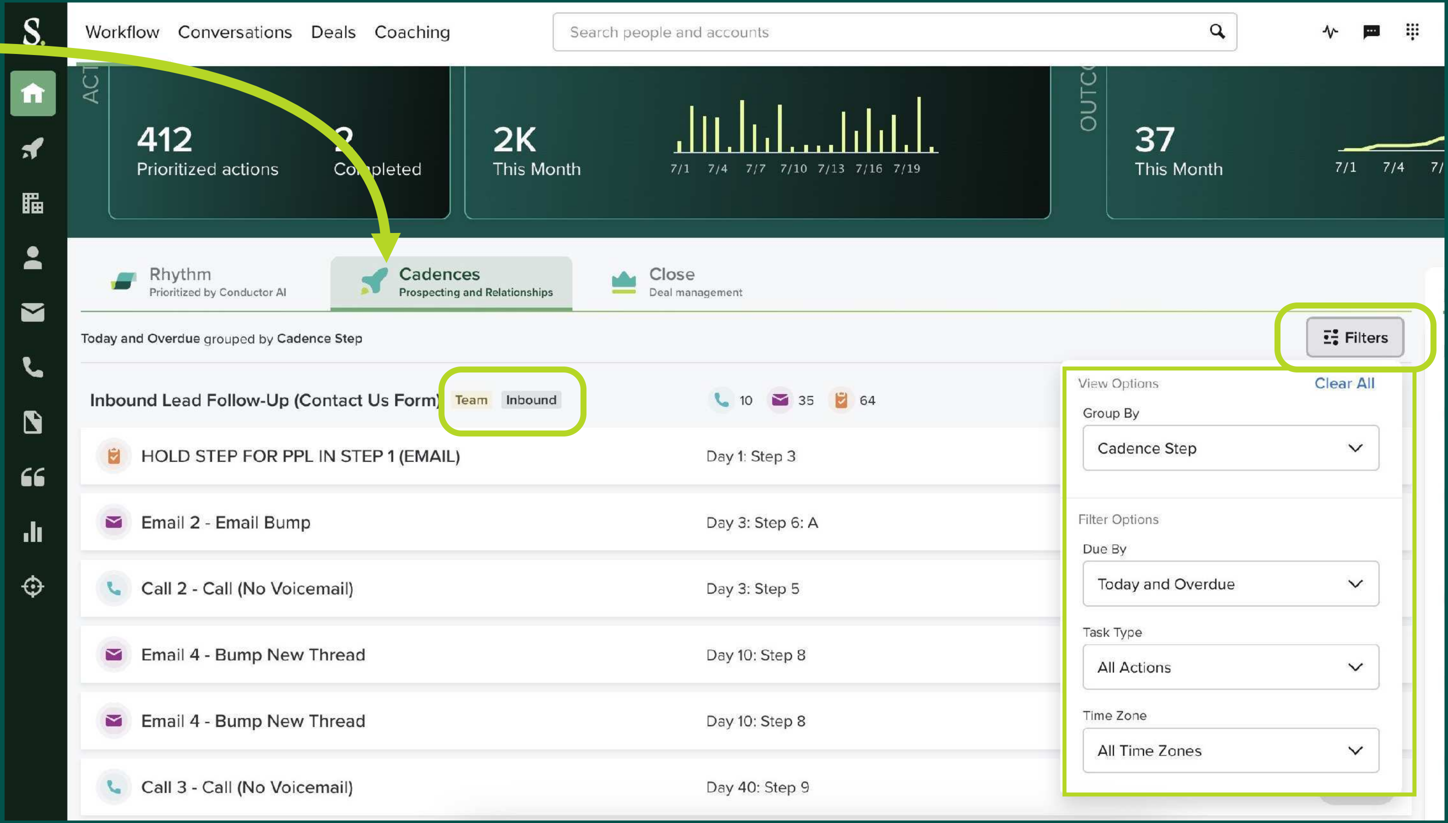
The Cadences Focus Zone

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.).



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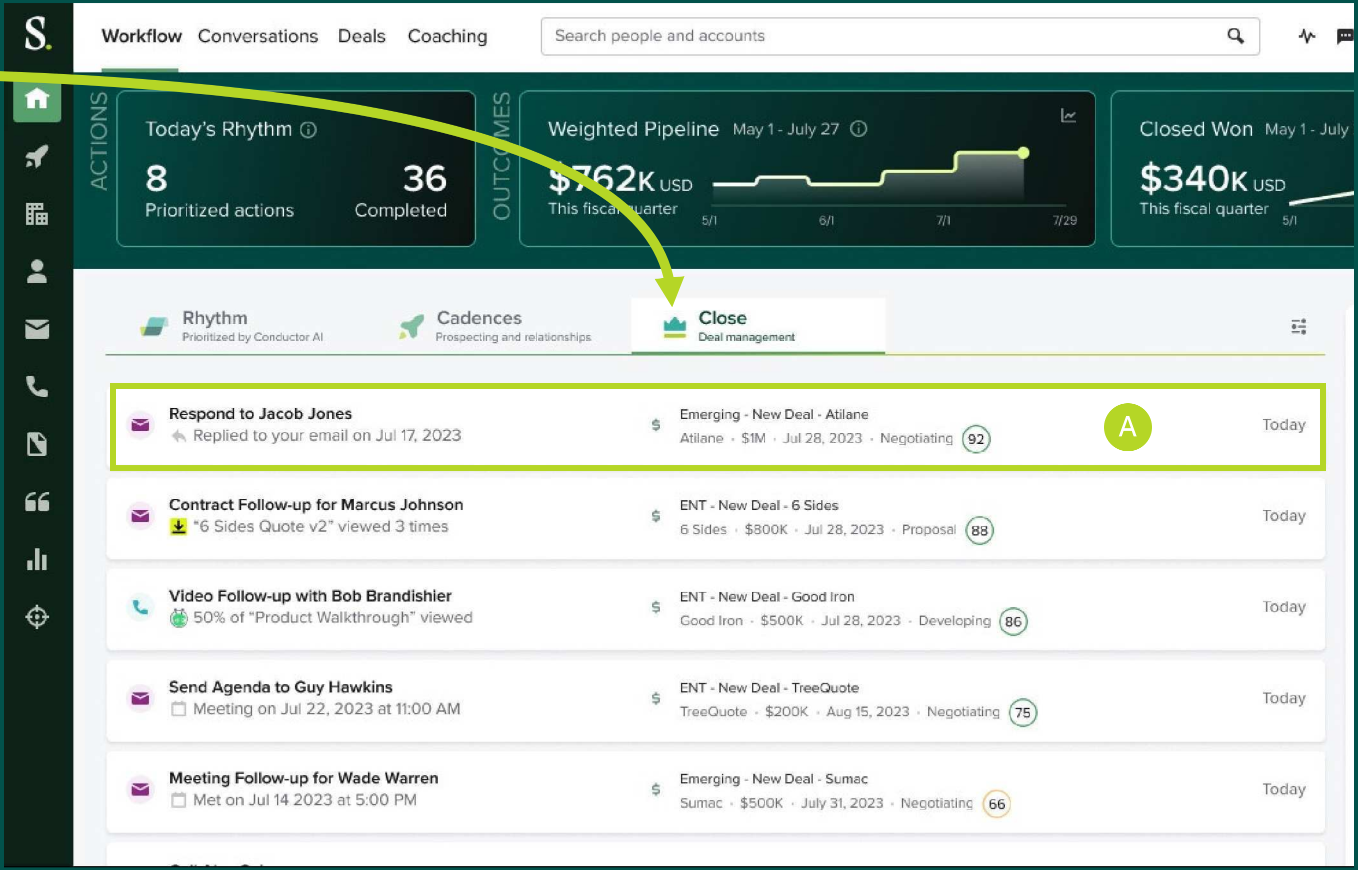
The Close Focus Zone

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



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.

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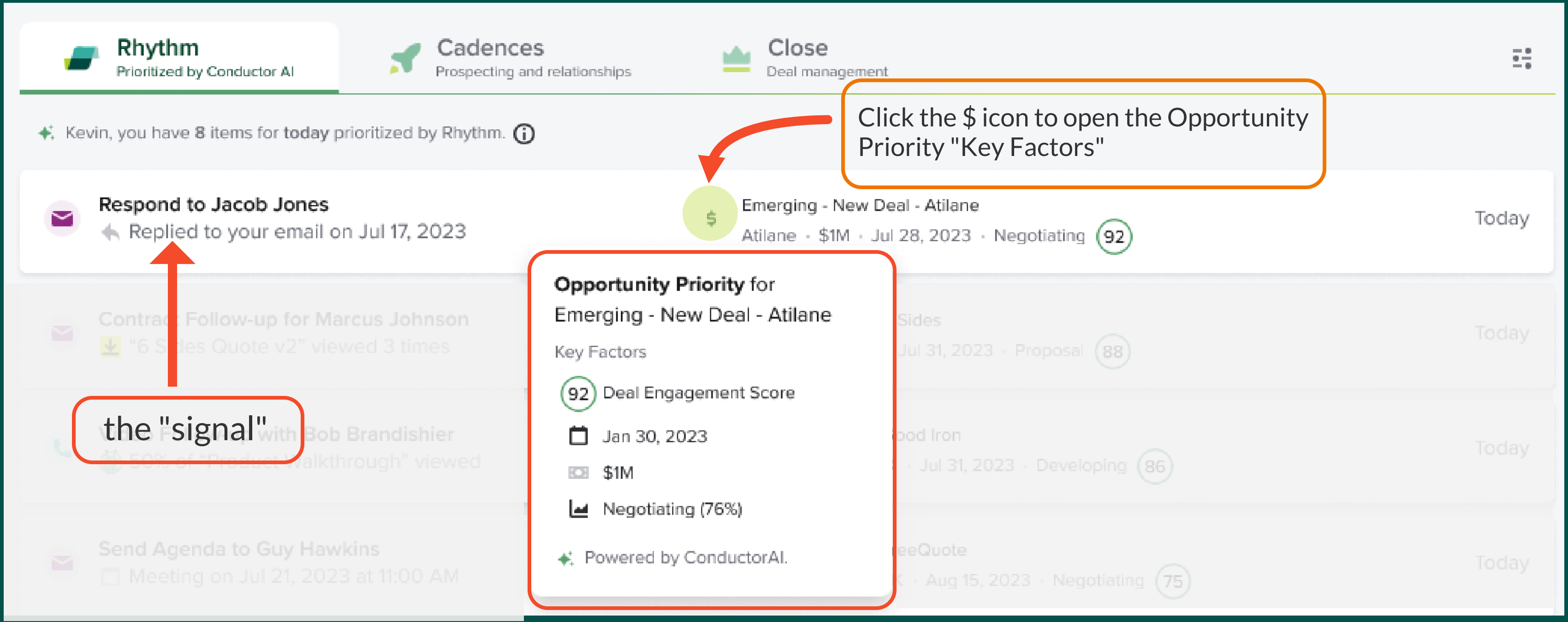
Anatomy of an Action

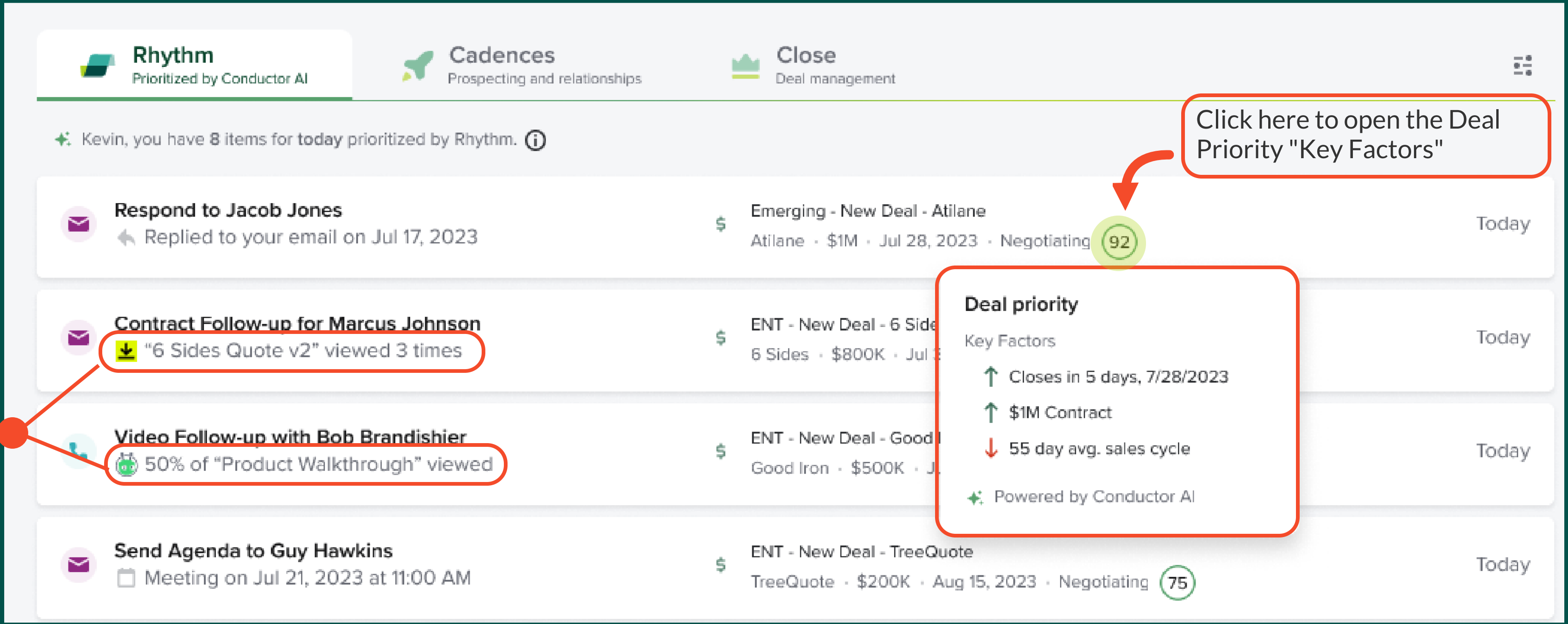
The "action"



Anatomy of an Action

The "action"

Partner signals



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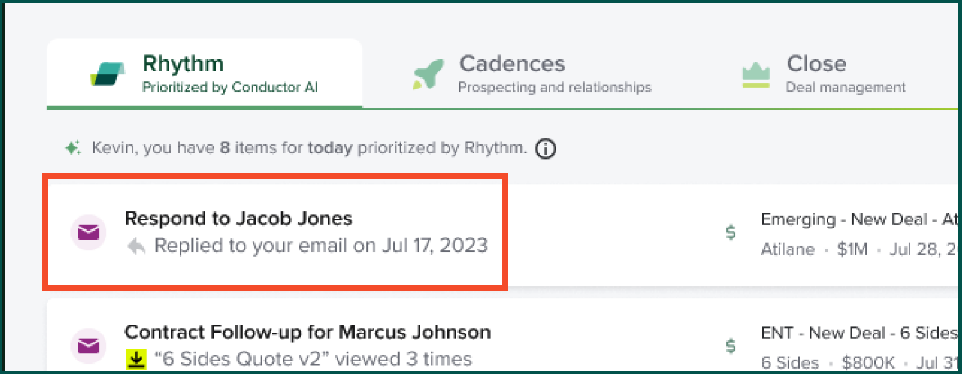
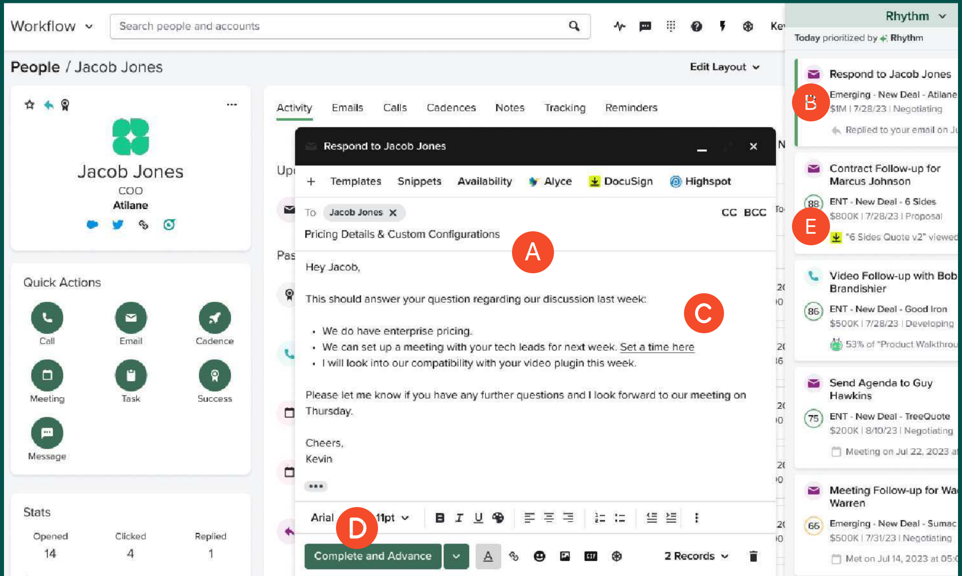
Completing an Email action in the Rhythm Focus Zone



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).



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

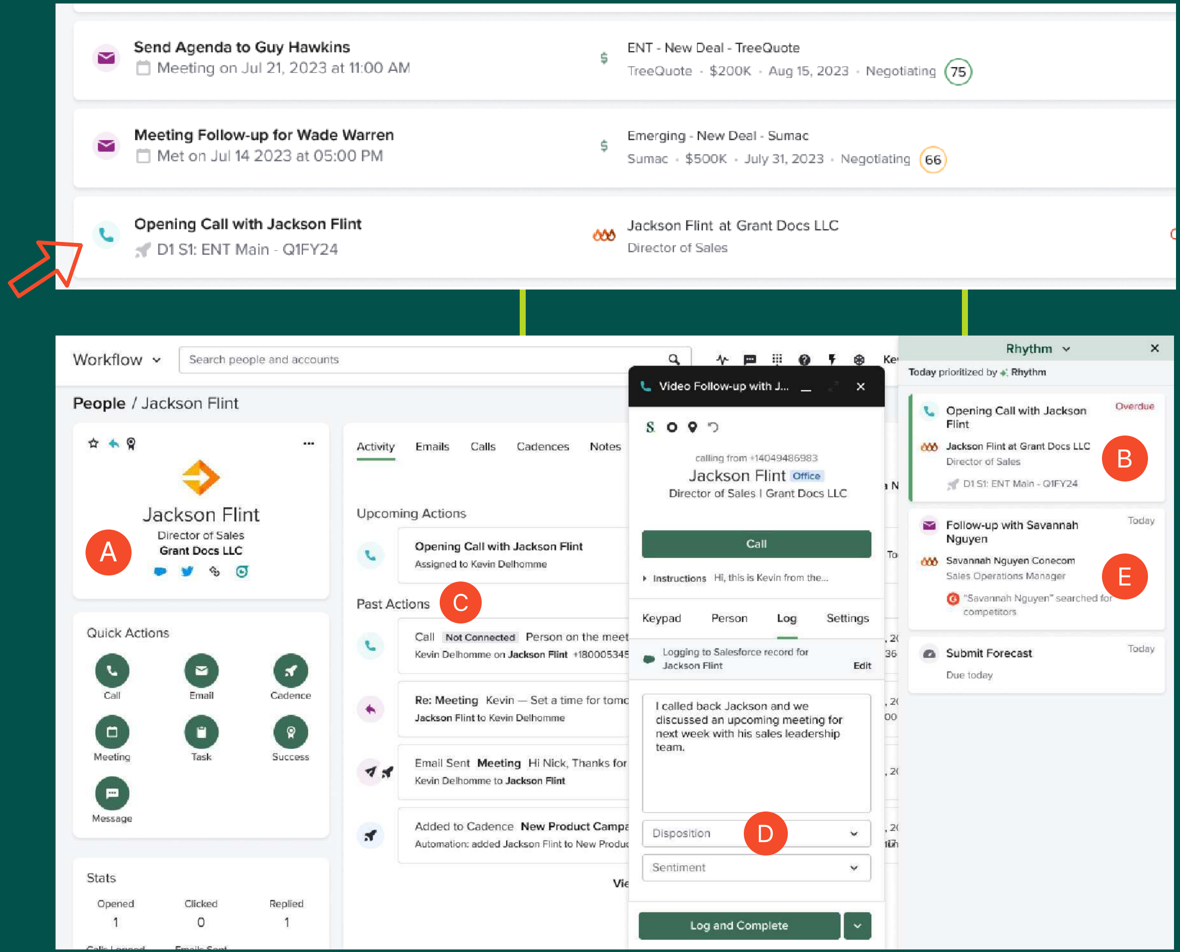
1. Click on the the action item--e.g., *Opening Call with Jackson Flint*-- in your Rhythm Focus Zone to open it.

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:

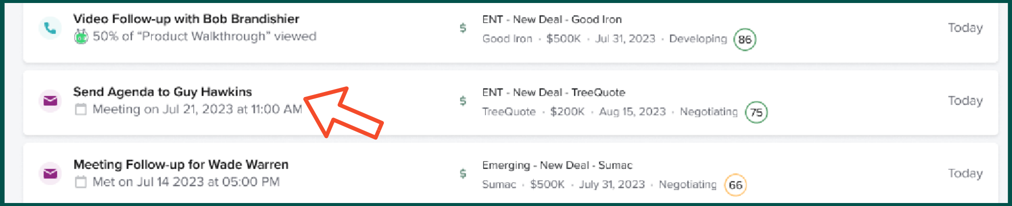
Plays are triggered by a specific buyer and/or seller activity. For example, when you (the Seller) schedule a meeting in Salesloft with a buyer, this will trigger a "Meeting Reminder Play".

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.

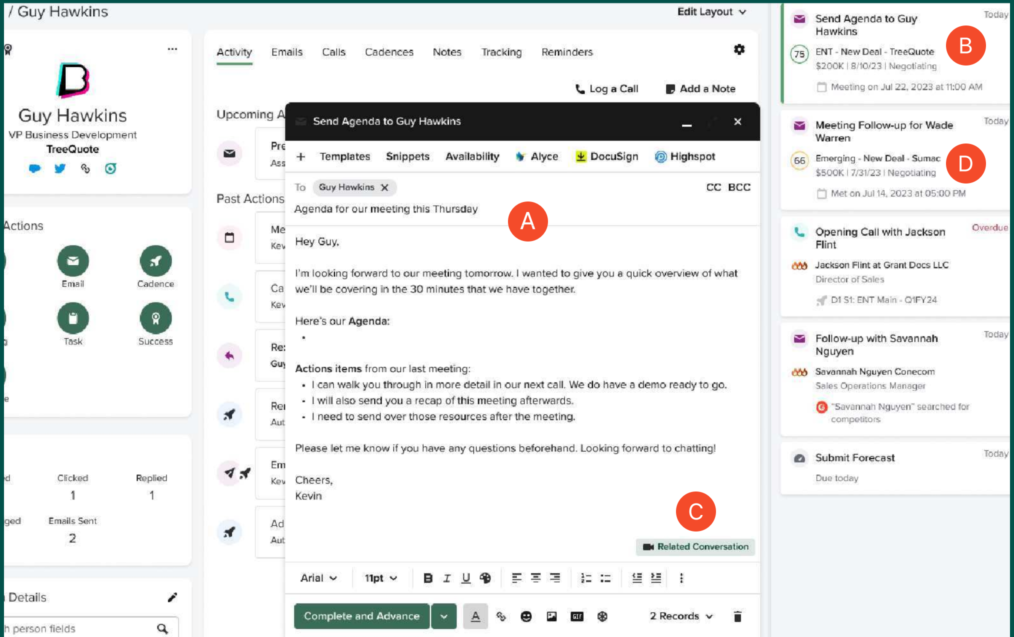
There are currently 5 pre-configured Plays (with more being added). Meeting Play actions utilize customizable email templates which open automatically in the recipient's People page, saving you time and effort.

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).

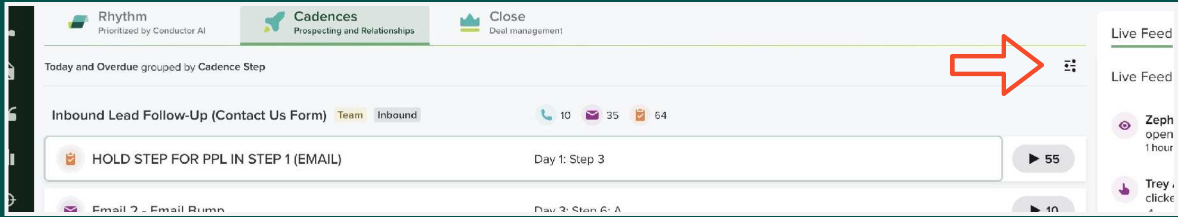
Mr. Hawkins' People page contains Past Actions (including calls, emails and notes) for context. There is also a Related Conversation button (c) that will open the previous meeting recording complete with transcript, X-rays and Action Items that you can use as a reference when creating your Meeting Agenda.

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

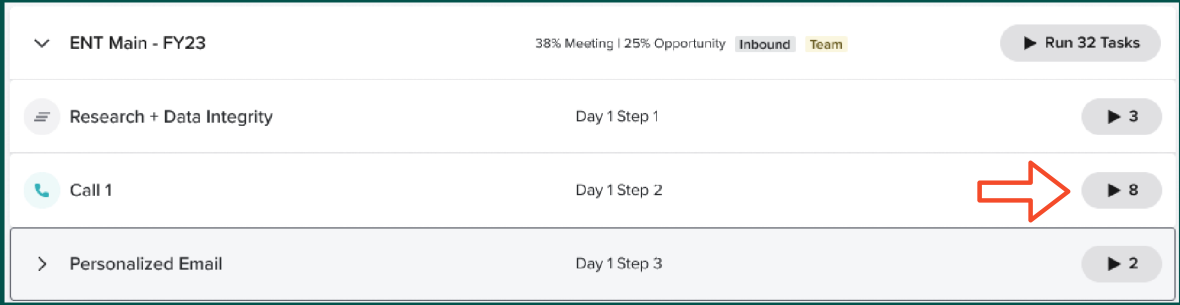
You'll advance to the next action in the Rhythm sidebar-- *Meeting Follow-up for Wade Warren* (d) - which will open automatically in Wade Warren's People page.

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.

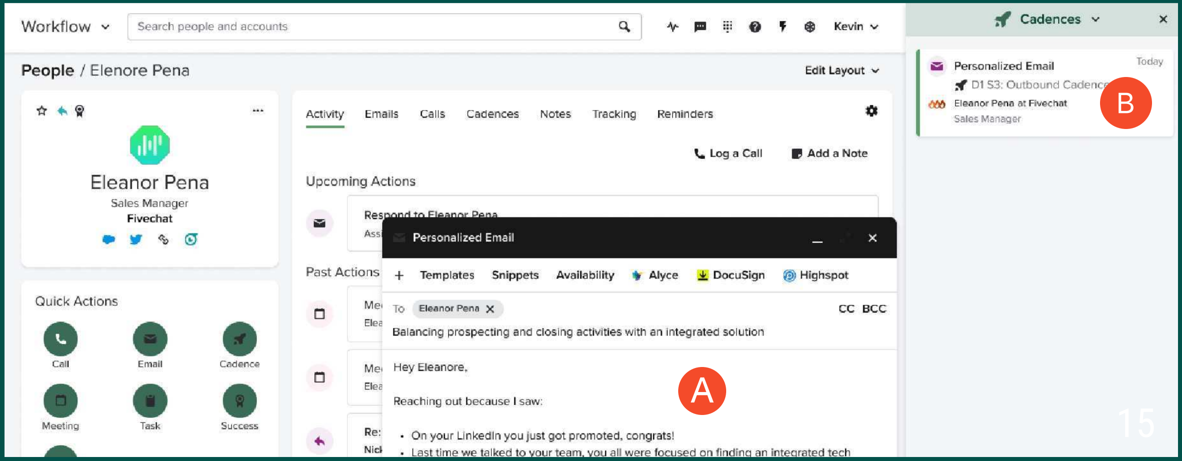


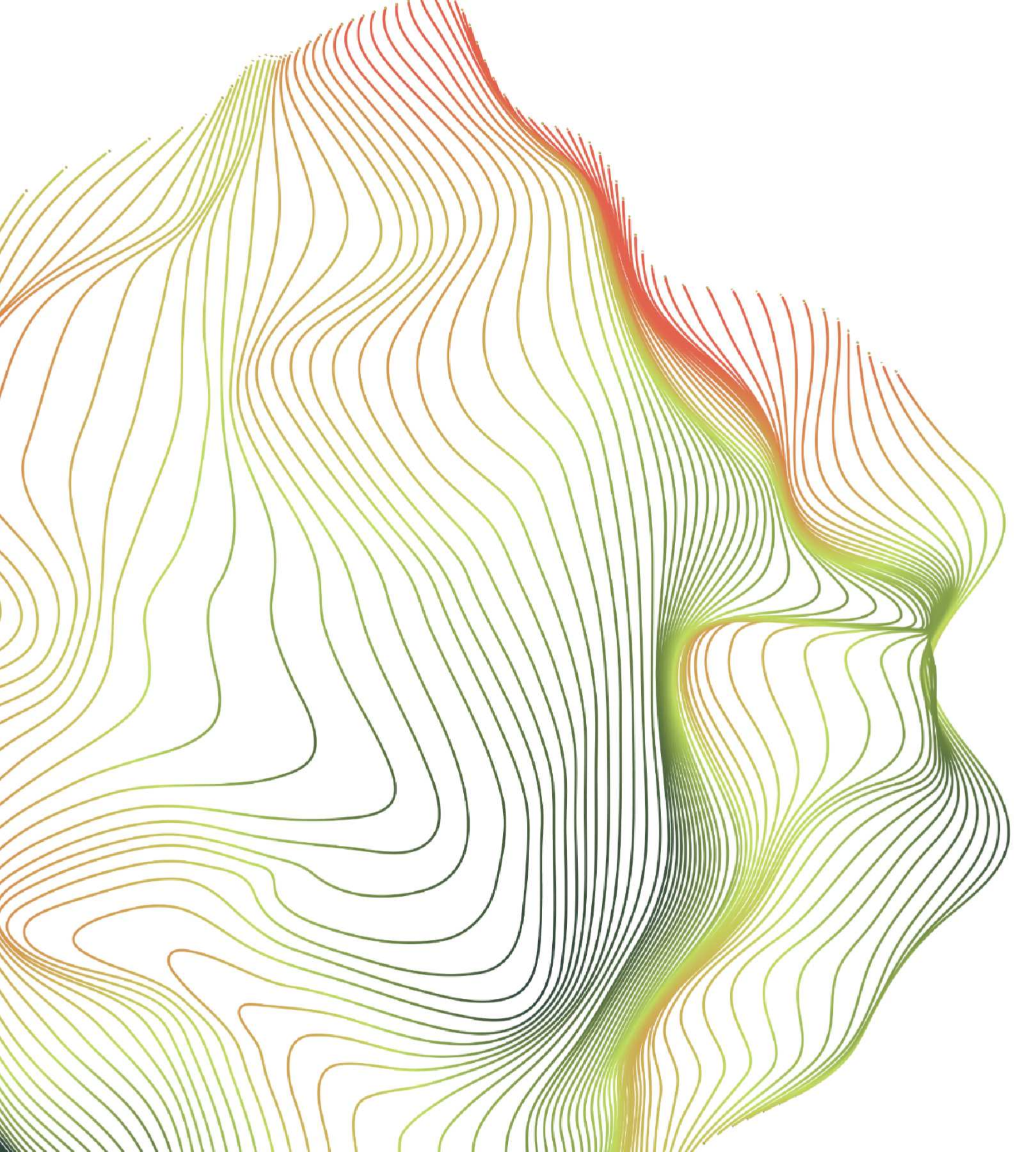
2. All due steps associated with a Cadence will display. To open a step , click the gray button to the right .



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?


Click to play video

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)

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