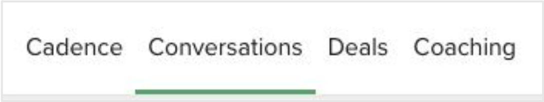
Salesloft.

Conversations

Salesloft Platform Resource Guide

OFFICIAL SALESLOFT GUIDE

What is Conversations?



Conversations captures recordings so you and your team can analyze and review meetings. This functionality allows team managers to showcase success stories to your organization, share examples for faster onboarding, and improve call coaching with live notes and recording reviews.

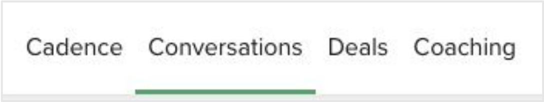
To access Conversations, select the Conversations Product Tab from the top navigation in the Salesloft platform.

Things to note:

Conversations is an included feature for Advanced and Premium packages. A trial of Conversations is available for the Essentials package.

Watch this quick video for an overview of Conversations.

Conversations Integrations



Conversations meeting platform integrations allow meetings to be captured through your team's meeting platform and accessed in Salesloft.

When you connect your calendar in your Salesloft account, Conversations will capture any meetings scheduled in your calendar via the Conversation Intelligence bot or via API integration:

API Connection:

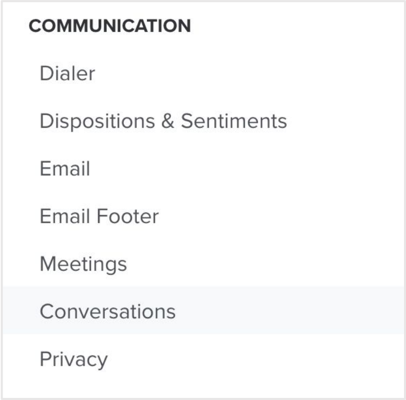
- Zoom
- Webex
- Webex Enterprise
- Google Meet

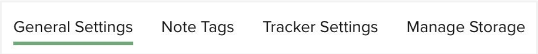
Learn How Meetings Are Captured here

Conversation Intelligence Bot:

- BlueJeans
- Join.me
- Microsoft Teams

Conversations - Admin Settings





To Access Admin Conversations Settings: Navigate to Settings → Communication → Conversations

<u>General Settings</u>

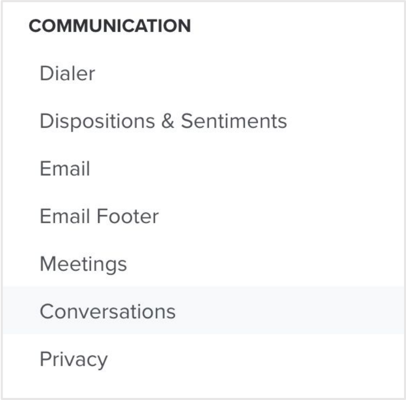
The Conversations bot can capture meetings through the following integrations:

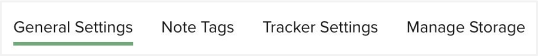
- Microsoft Teams, Bluejeans, Join.me

Things to Note: The Bot will not join meeting platforms that have CAPTCHA enabled.

- **Bot Settings** determine how the Conversations bot interacts within your team's instance. The Bot Settings include the following sections:
  a. **Bot Name:** Determines how the bot will appear as an attendee during meetings.
  b. **Bot Behavior:** where you can configure how and when the bot will join your team's meetings. The bot behaviors include join behaviors and join time.
- **Bot Detects Alternate Emails:** Shows the email addresses associated to each Conversations user on your team.
- For a detailed walk-through and setup instructions of the Bot Settings tab, check out the Manage the Conversations Bot article.

Conversations - Admin Settings

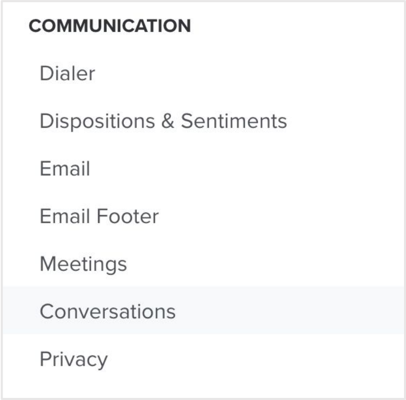


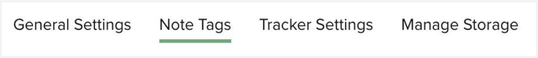


General Settings

- Public Domain Provider Recognition
  - Conversations does not recognize public domain providers by default. If you work with teams who have public domains, enable this setting to ensure those meetings are recorded.
- Do Not Record Domains
  - Admins can add do not record domains to keep Conversations out of those confidential calls.
  - To learn how to manage the do not record list, check out the Set Domains as Do Not Record article.

Conversations - Admin Settings





Note Tags

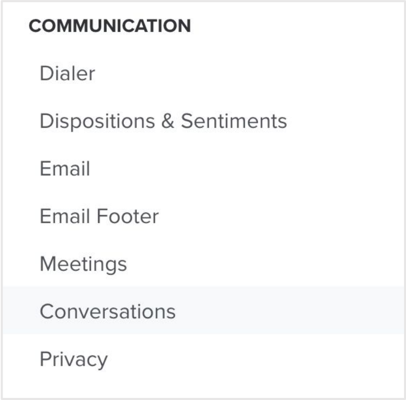
Note Tags are labels your team can add to any comments made during the meeting. Once recordings are tagged, you can filter recording lists by a specific tag, to search and review the meetings with that tag.

Only an admin can create the tags your team will use. So, consider the categories that your team would like to review the most. Some common starter ideas include:

- "competitor mentioned"
- "success"
- "needs review"

Then, check out Manage Conversations to learn how to add and edit Note Tags.

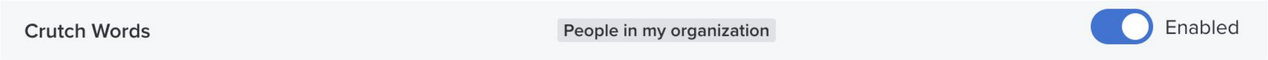
Conversations - Admin Settings

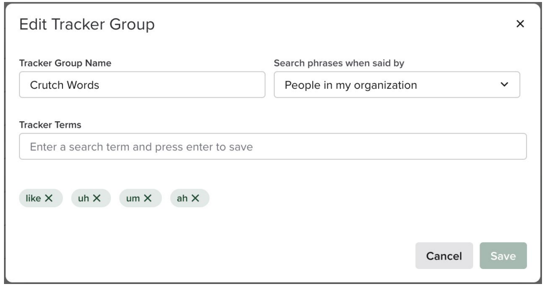


Tracker Settings

The Tracker settings decide the words and phrases that Conversation Intelligence will specifically scan for. The tracker uses groups to define which words or phrases to search for and who on the call may speak them.

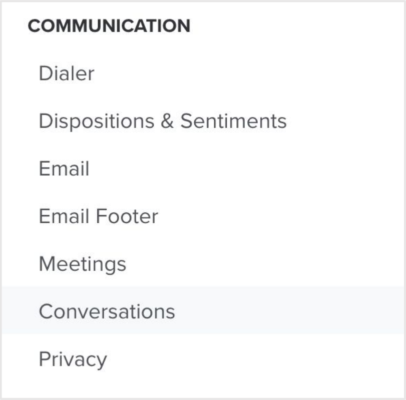
Maybe you want to focus training on crutch words (“like,” “um,” “uh h,” etc) or you could set a search for any mentions of competitors.

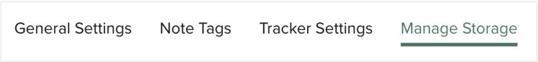




Use this article to learn how to Add, Edit, or Remove Tracker Groups.

Conversations - Admin Settings



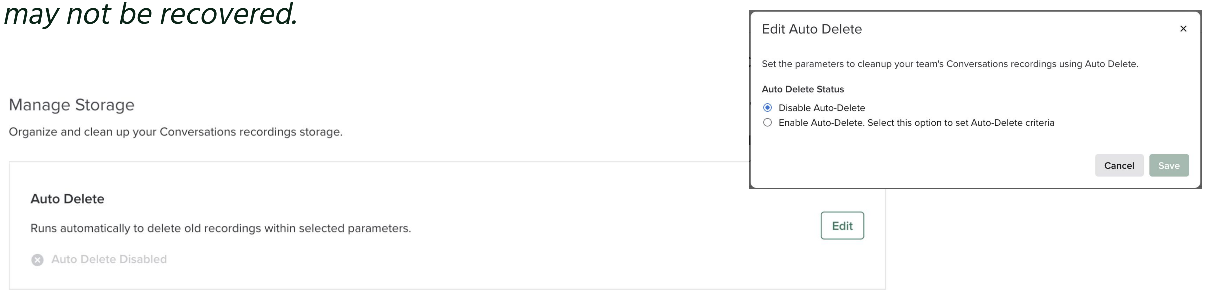


Manage Storage

Managing storage for an entire team can be time consuming, and with so many Conversations recordings to review, deciding which to save and which to delete can be a tedious process.

Conversations Auto-Delete simplifies storage management by allowing recordings to be automatically deleted based on the Auto-Delete criteria that you, as an admin, set for your team.

Things to Note: Deleting recordings is a permanent action. Recordings that have been deleted may not be recovered.



Utilize this [Admin Setup Checklist] to ensure proper set up.

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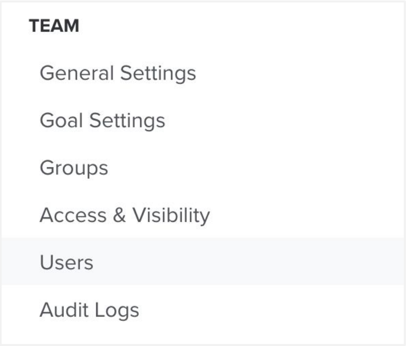
Conversations - Admin Settings



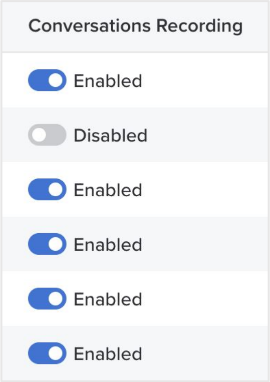
As an Admin, you will need to enable Conversations for Users

Navigate to Settings → Team → Users

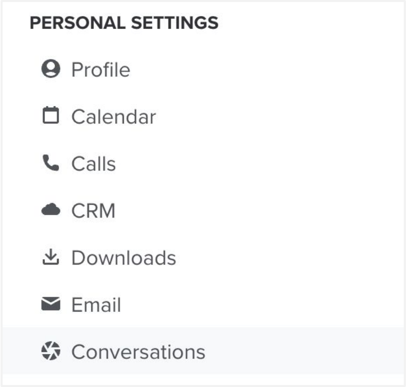
Things to Note:

- *Enabling Conversations means that the user's meetings can be captured and viewed in the Conversations tab.*
- *If a Salesloft user does not have Conversations enabled, they can still view meetings captured for other Conversations users.*

Check out the Set Up Conversations article to learn more.



Conversations - User Settings



To Access User Conversations Settings: Navigate to Settings → Personal Settings → Conversations

Video Conferencing Integrations:

- Teams who use Zoom, Google Meet, or Webex:
  - Connect to Salesloft via **API** from this page. This allows video meetings to be captured and brought into Conversations.
- Teams who use Microsoft Teams, Join.me, or BlueJeans:
  - Utilize the **Bot** to capture meetings in Salesloft. Select your Bot preferences.

If you use the API Connection, you do not need to set up the Bot. If you use the Bot, you do not need to set up the API Connection.

Follow this [Conversations User Checklist] to set up Conversations as a User.

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Knowledge Base

Conversations Admin Checklist
Manage Conversation Intelligence
Manage Conversations Intelligence Bot
How Meetings are Captured
Conversations User Checklist
Additional Self-Learning articles available at help.salesloft.com

Salesloft Events

Programs and webinars that cover a wide array of topics to continue your education.
salesloft.com/events

Resources

Available resources to propel success

Office Hours

Open forum office hours hosted by our Success, Support, and Services teams to get your questions answered **live**.
Monday - Friday, 9am ET & 2pm ET
Tuesday & Thursday 11am GMT
Register

Technical Support

Submit any request for technical assistance and one of our experts will get back to you!

Submit a ticket | View all Cases by logging in at help.salesloft.com