

DAY 1 TASKS TO COMPLETE:

- Add 1 record to Playbooks from a Lead/Contact
- Add 10 records to Playbooks from a List View
- Complete a Call step
- Complete an Email step
- Complete a Click-to-Call
- Complete a Click-to-Email
- Make an Ad Hoc Phone Call
- Send an Ad Hoc Email
- On a Call step, explore your Caller ID options
- Click on a NeuralVerify icon to see more details
- Send an Email with NeuralSend
- Send an Email with a Tracked Attachment
- Create a pre-recorded voicemail
- Use your pre-recorded voicemail
- Create a Note in Playbooks (Activities Feed)

WEEK 1 BONUS TASKS TO ACCOMPLISH

- Change how your tasks are sorted
- Change your filters to only show between 8a-5p
- Add a phone number or email address to a record
- Verify that a task synced to the CRM
- Create an email template
- Use your email template
- Click on an Activity for a phone call (Activities Feed)
- Click on an Activity for an email (Activities Feed)
- Schedule a Call for a later date/time
- Reschedule a Play Step
- Open Insights & find 3 potential conversation starters
- In "Support & Feedback" search for a help article

RECOMMENDED PERSONAL SETTINGS:

Under the Playbooks Menu, go to Settings.

Preferences

- Add your Profile Image
- Enable Gmail Integration (if applicable)
- Enable Desktop Notifications
- Add your Power Anthem

CRM

- Change your CRM view to Opportunities

Phone

- Add Agent Number
- Select Calling Territories by Country

Email

- O365/Gmail: Connect to Email
- SMTP: Add Display Name
- Enable Default to NeuralSend
- Enable Email Tracking Notifications
- Add Email Signature

Notifications (O365 only)

- Add your computer as Do Not Track

FEATURES TO LOOK OUT FOR:

Playbooks uses the successes (and failures) of every other Playbooks user to guide you to the right people, with the best contact info, at the right time.

NeuralVerify can tell you what phone numbers and email addresses are most likely to result in success.



Verified, High Score

A highly verified phone/email address. You have high likelihood of making contact.



Verified

A verified phone/email address. Some recent interactions with this resulted in successful contact.



Common Corporate Email / Phone

This phone/email address is a generic contact and not direct to an individual.



Previously Verified

This phone/email address was last verified more than 60 days ago.



Verified Mobile Number

This is a highly verified mobile or direct dial line. You have a high likelihood of making contact.



No Answer

Calls to this phone number are not typically answered.



Stale Email / Phone

Many users have attempted to contact this phone/email address with little to no recent success.



Fax Number

This phone number appears to be associated with a fax number.



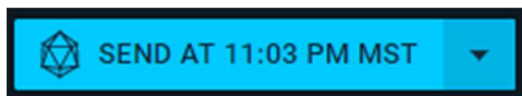
Bounced Email / Bad Number

Contact attempts to this phone/email address have bounced or reported as disconnected within the last 60 days.

BEST PRACTICES:

- When you complete the goal of a Play, mark the Play Successful, to determine what Plays work best.
- If you need to make a call that is not part of a Play, use Click-to-Call, so the task is logged to the CRM.
- Sort your tasks based on what you would like to focus on right now. Filter out people that it is too early (or too late) to call.
- People who do 80% of their daily activities in Plays are happier overall than those who don't.
- When adding people to Playbooks, only add a few at a time. If you add too many people, you may have more tasks to complete than you can manage. The total number of records you should enroll in Playbooks should not exceed 2000.
- The Marginal Value sort will suggest the activities that can have the biggest financial impact on relieving quota.

NeuralSend emails are opened 21% more often than those sent without NeuralSend.



NeuralMap shows you other people at the prospect company that are involved in buying decision.

