People.ai + 6sense Prospecting Workflow Setup

With the power of People.ai + 6sense, you can focus our prospecting and build more pipeline.

With the combination of People.ai and intent providers like 6sense, you can easily operationalize a powerful prospecting workflow for your Sales Development Reps, Field Reps, and Sales Managers directly inside of Salesforce. By combining People.ai Account Engagement Level data with 6sense Account Intent Scores and the People.ai Account 360 lightning component you can quickly report on what Accounts are actively in-market for your solution but have little to no engagement by the go-to-market teams. This powerful combination provides a simple list of Accounts that your sales team should prioritize as they focus on prospecting and building pipeline.

Product Prerequisites

People.ai

1. Upgraded to Managed Package 4.4 (Support for 3.11 also possible with limitations)
2. Account Engagement Level sync is turned on
    a. Field name = Engagement Level (People.ai)
3. People.ai Account 360 Lightning Component is added to Account Record Page in Salesforce

6sense

1. 6sense Intent Score field available for reporting
    a. Field name = 6 Sense Account Intent Score

How to Setup Workflow Inside of Salesforce

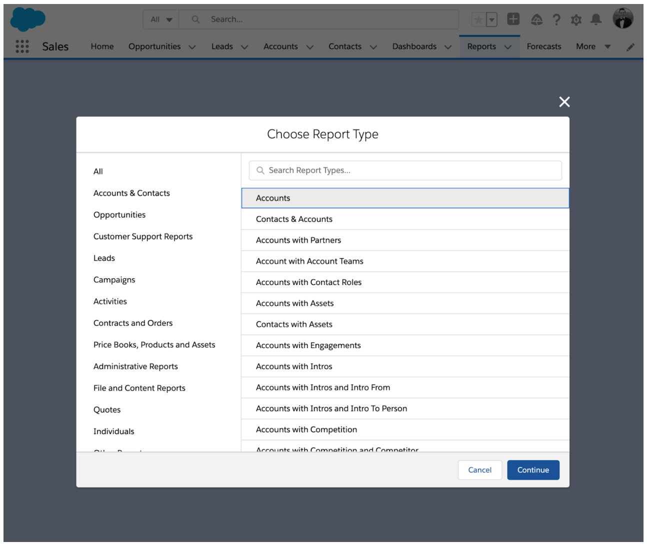
This workflow requires setting up the following:

1. 2 Salesforce Reports
2. 1 Salesforce Dashboard
3. 1 Layout change to the Account Record page

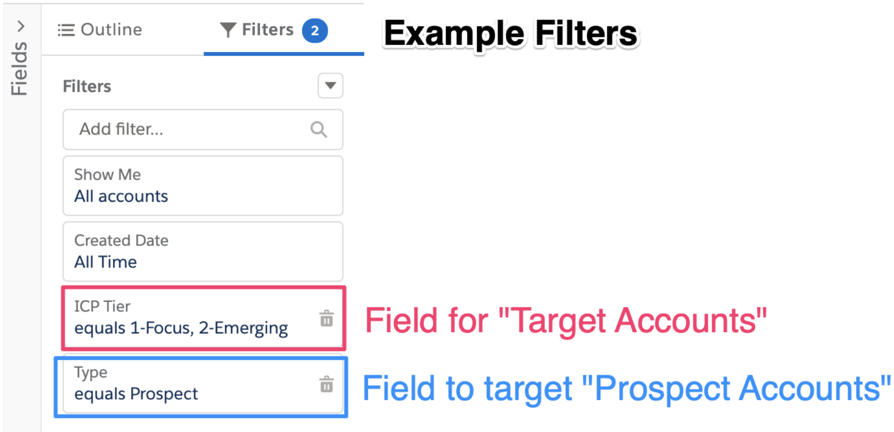
Salesforce Report Setup (only requires 3.11 managed package)

Report #1 - Target Account Engagement & Intent

1. Go to Reports and click “New Report”
2. Select the “Accounts” report type and click “Continue”

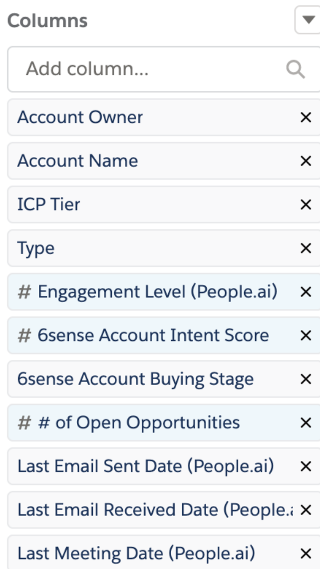


3. Adjust the Filters tab to reflect the Account universe that you’d like to report on for your sales team
   a. Filters to consider for the report:
      i. Show “All Accounts”
      ii. Use Created Date = All Time
      iii. Identify a custom field to limit the list to a set of targeted Accounts, like a named account or priority list of accounts, for example, the “Global 5000” accounts that are a priority for your sales leaders
      iv. Type of Account. If you are using 6sense data to find new customers, use filters that identify Accounts that are considered prospects and filter our customer or partner accounts



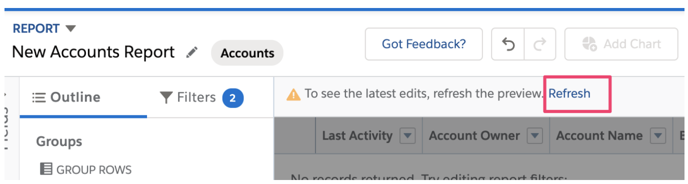
      v.

4. Click on the “Outline” and find the “Column” section and add the following fields via the Column search bar



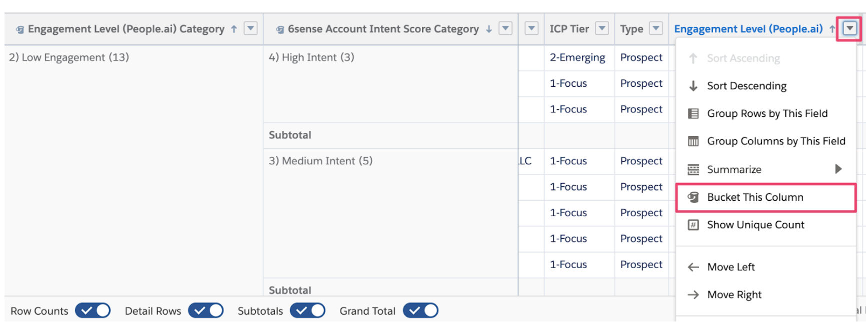
a.

5. Click Refresh



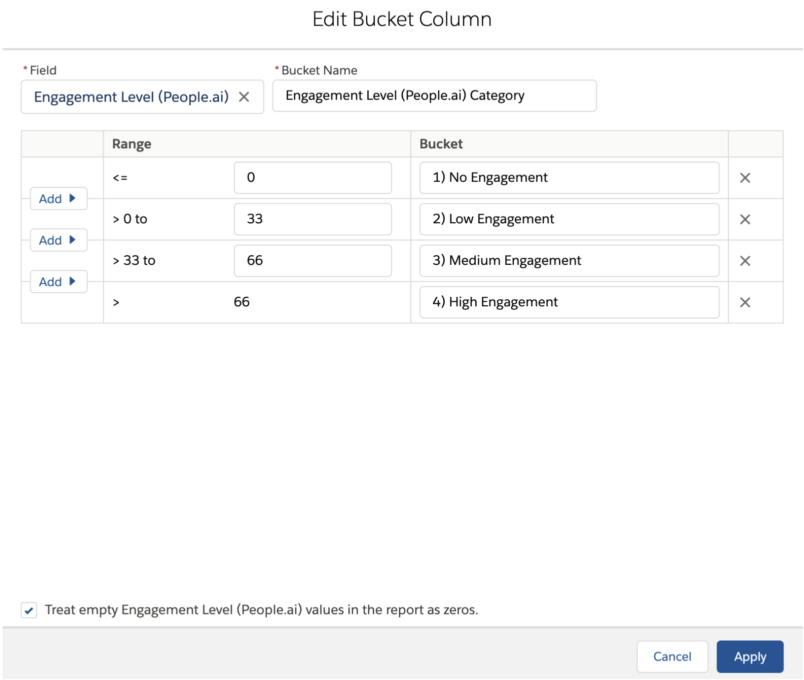
a.

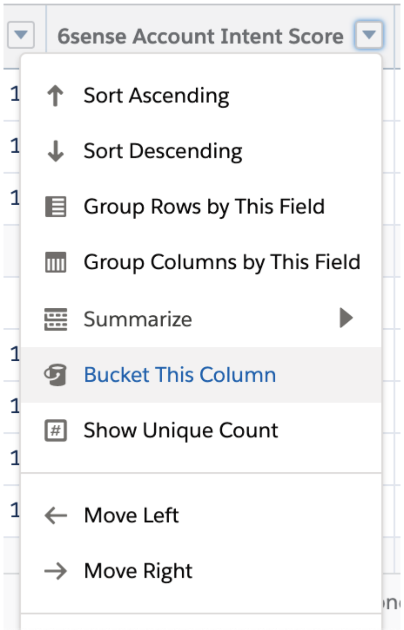
6. Navigate in the report and find the "Engagement Level (People.ai) Field
   a. Click the down arrow next to the field name
   b. From the drop-down select "Bucket this Column"



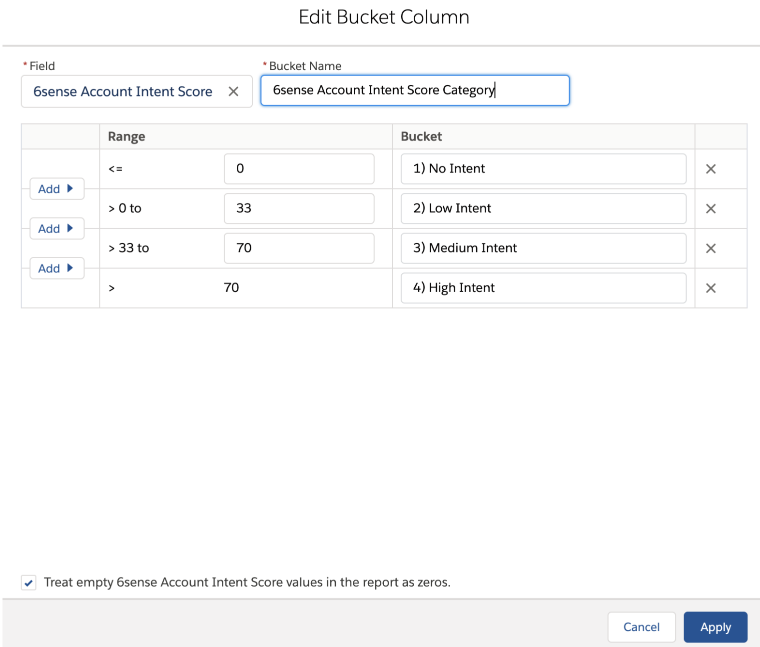
   c. Input the following values in the bucket dialog and ensure that the checkbox called "Treat empty Engagement Level (People.ai) values in the report as zeros." is marked as True

(checked)

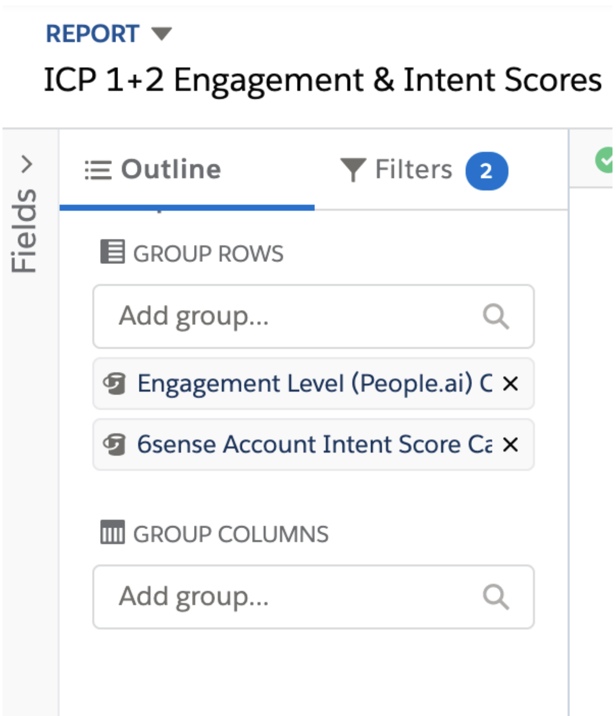


7. Click Apply and navigate back to the columns and find the 6sense Account Intent Score
    a. Click the down arrow next to the field name
    b. From the drop-down select “Bucket this Column”
    c. 

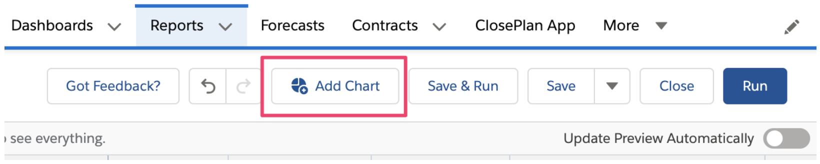
d. Input the following values in the bucket dialog and ensure that the checkbox called "Treat empty 6sense Account Intent Score values in the report as zeros." is marked as True (checked)



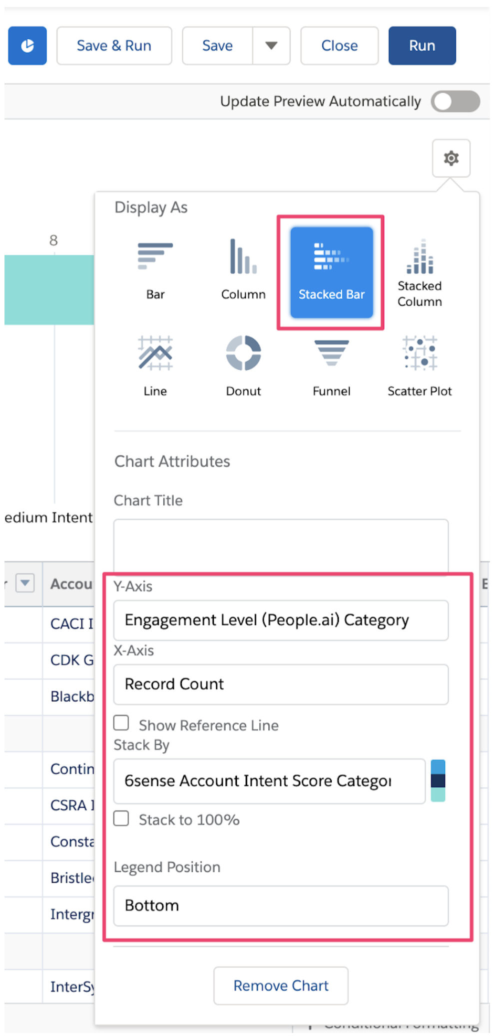
8. Add the two new bucketed fields in the "Group Rows" section of the outline

a. 

9. Click the Chart button in the report builder

a. 

b. Click Refresh again and then click the ‘Chart Properties” icon and input the following details

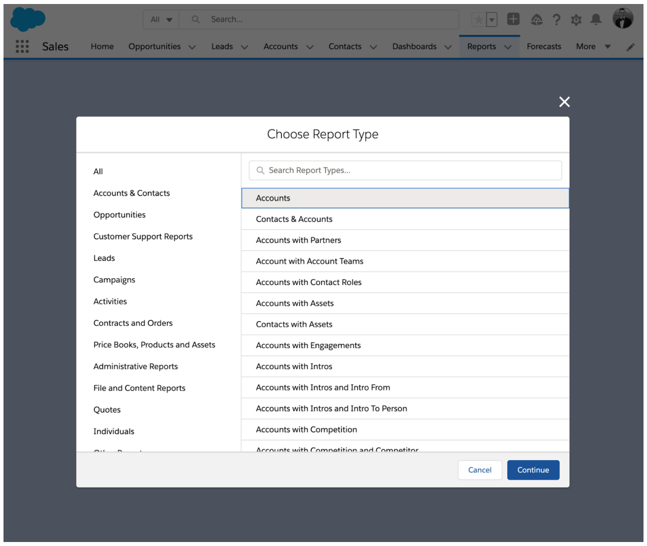


10. Now Click “Save & Run” and finish naming the report “Target Account Engagement & Intent Scores” and save the appropriate folder.

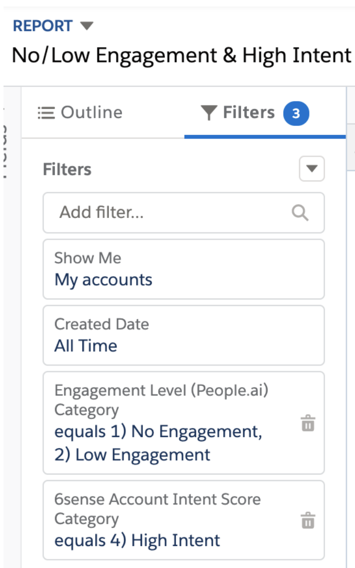
Report #2 - No/Low Engagement & High Intent

1. Go to Reports and click “New Report”

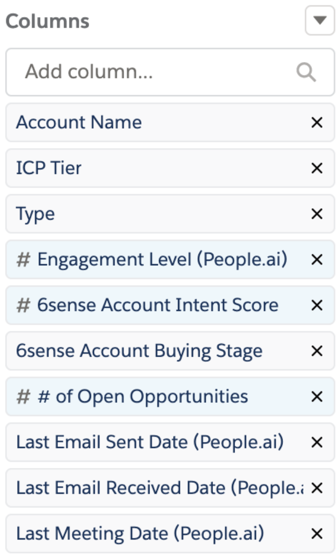
2. Select the “Accounts” report type and click “Continue”



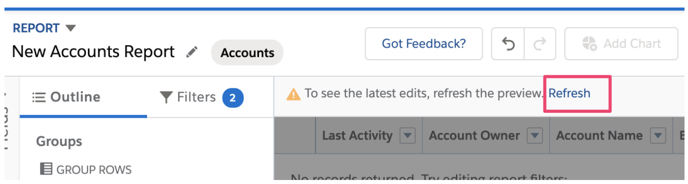
3. Adjust the Filters tab to reflect the following:



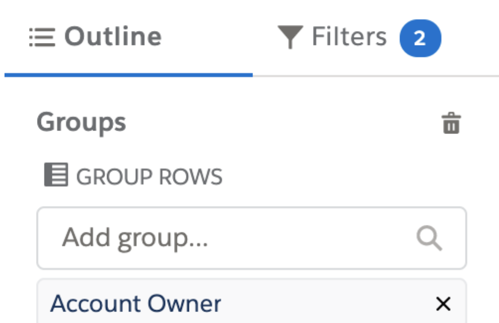
4. Click on the “Outline” and find the “Column” section and add the following fields via the Column search bar



5. Click Refresh



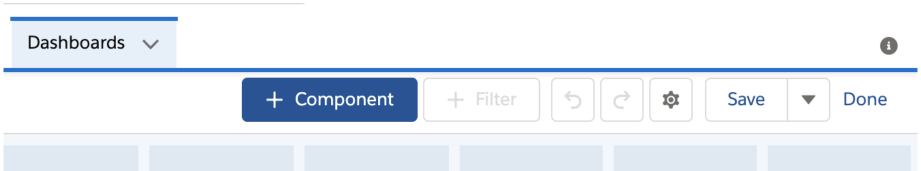
6. Add the Account Owner field in the “Group Rows” section of the outline



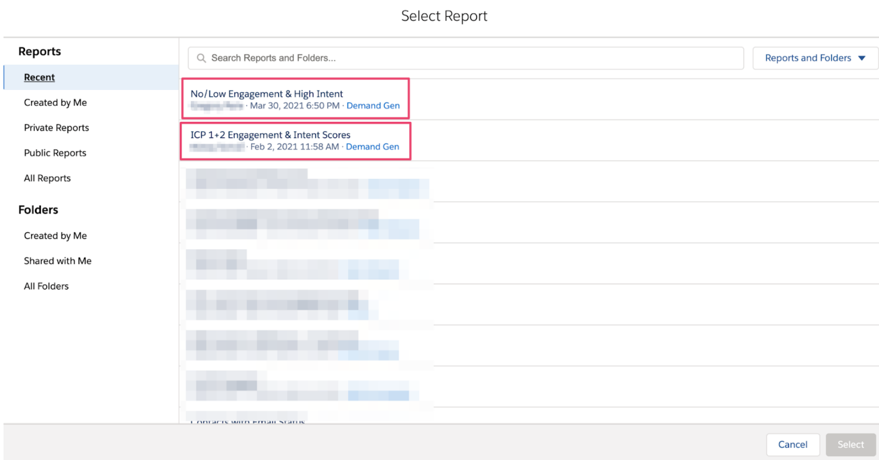
7. Click “Save & Run” and save it as “No/Low Engagement & High Intent”

Salesforce Dashboard Setup (only requires 3.11 managed package)

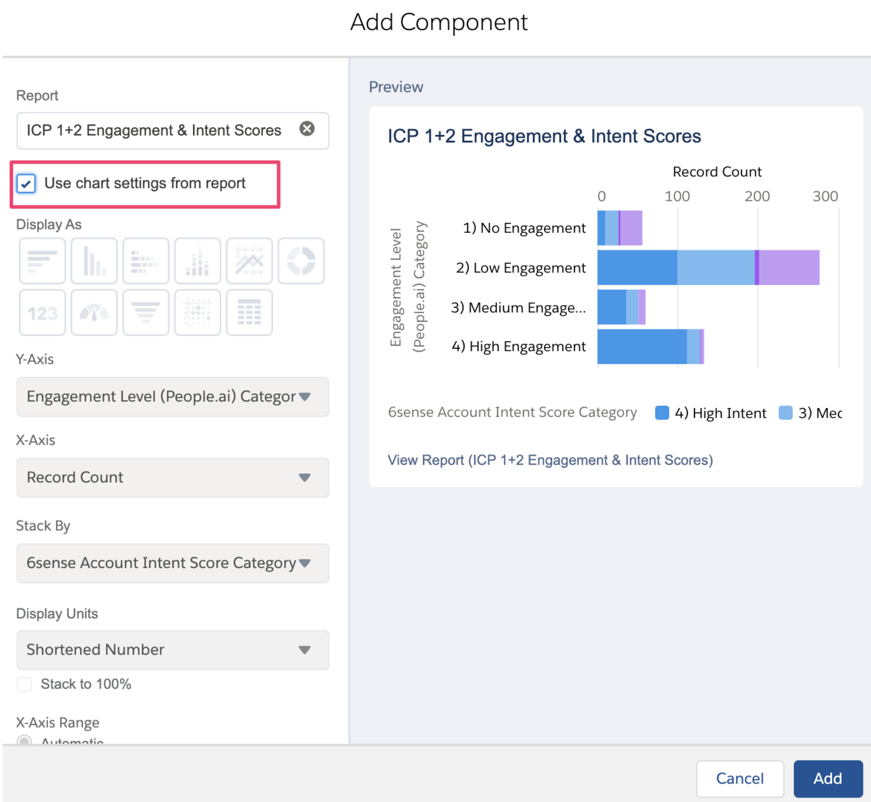
1. Click on “Dashboards” and select “New Dashboard”
2. Name it “Account Engagement & Intent” and save it in the reflective folder and click “Create”
3. Click “+Component”



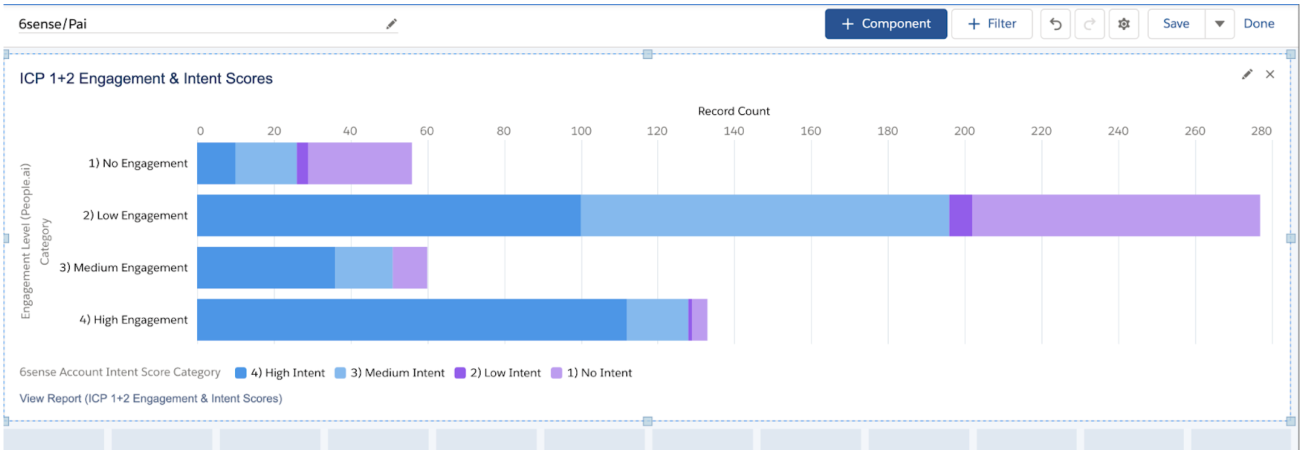
4. Find the "ICP 1+2 Engagement & Intent Scores" report that was created in the previous step and click "Select"



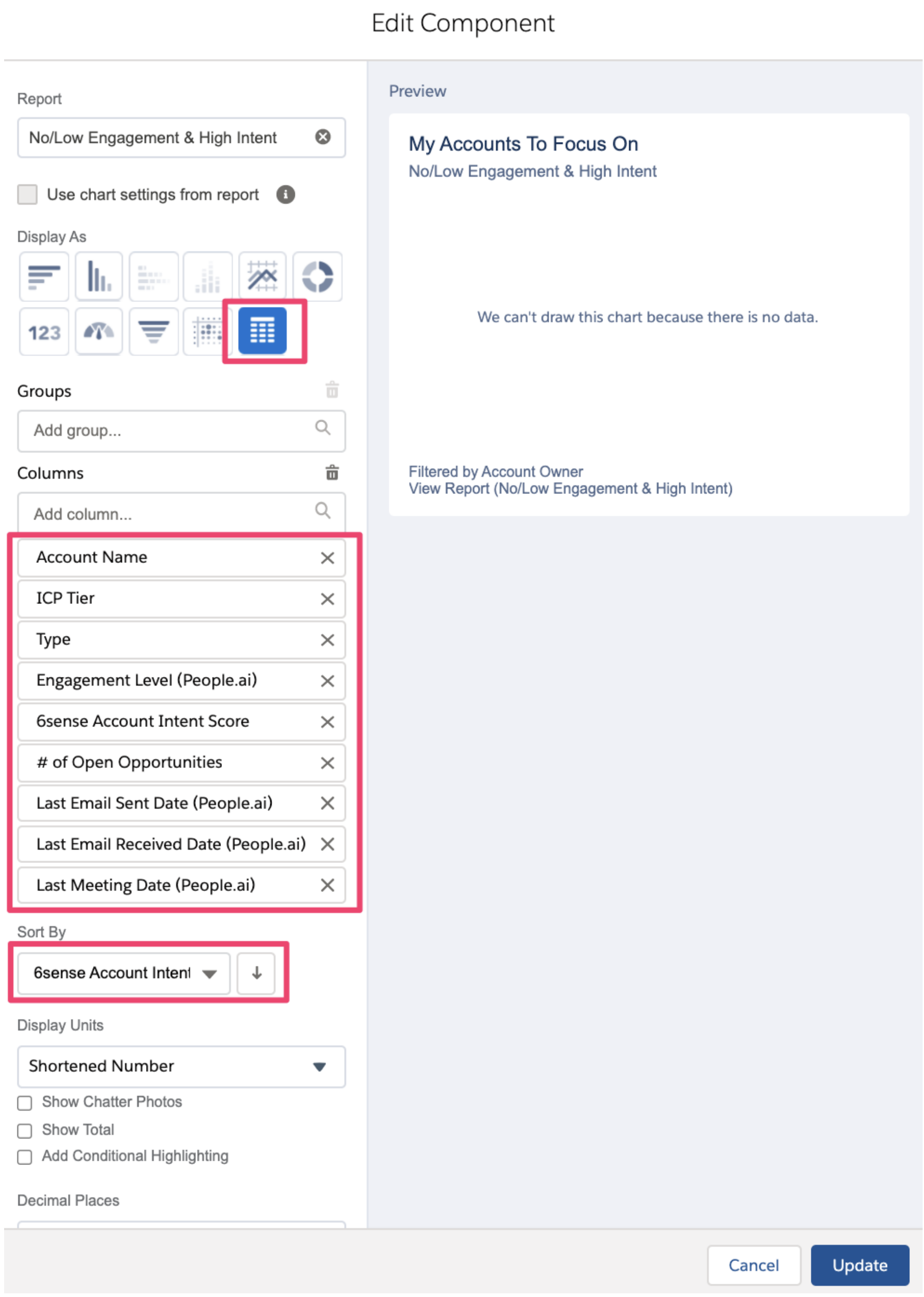
5. Then check the box for "Use chart settings from report" and click "Add'

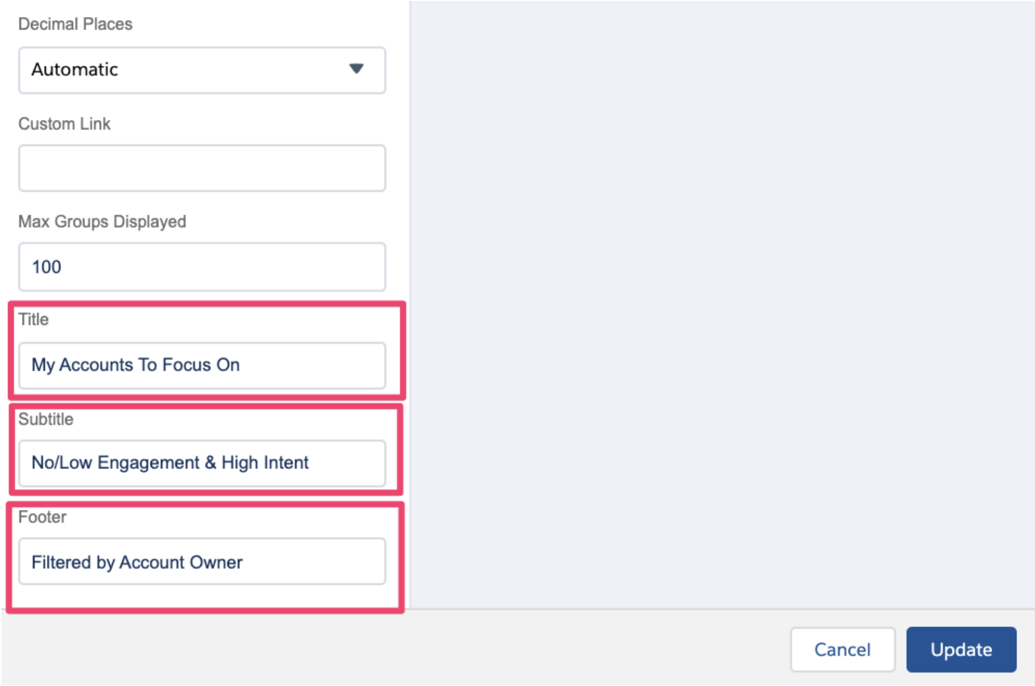


6. Use the window selector to drag the chart to fill up the entire dashboard width

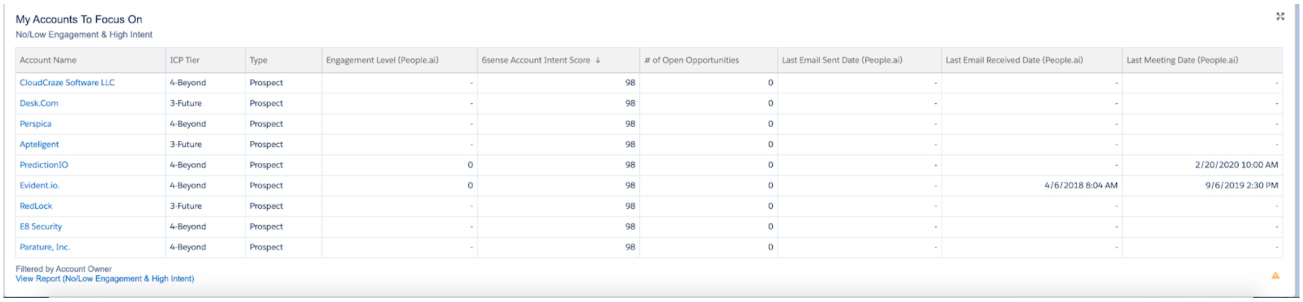


7. Click “+ Component” again and find the report called “No/Low Engagement & High Intent”
8. Adjust the settings as follows:


Edit Component
Report
No/Low Engagement & High Intent
Use chart settings from report
Display As
123
Groups
Add group...
Columns
Add column...
Account Name
ICP Tier
Type
Engagement Level (People.ai)
6sense Account Intent Score
# of Open Opportunities
Last Email Sent Date (People.ai)
Last Email Received Date (People.ai)
Last Meeting Date (People.ai)
Sort By
6sense Account Intent
Display Units
Shortened Number
Show Chatter Photos
Show Total
Add Conditional Highlighting
Decimal Places
Preview
My Accounts To Focus On
No/Low Engagement & High Intent
We can't draw this chart because there is no data.
Filtered by Account Owner
View Report (No/Low Engagement & High Intent)
Cancel
Update



9. Use the window selector to drag across the width of the dashboard
10. Click Save - note



My Accounts To Focus On
No/Low Engagement & High Intent

Account Name	ICP Tier	Type	Engagement Level (People.ai)	6sense Account Intent Score ↓	# of Open Opportunities	Last Email Sent Date (People.ai)	Last Email Received Date (People.ai)	Last Meeting Date (People.ai)
CloudCraze Software LLC	4-Beyond	Prospect	-	98	0	-	-	-
Desk.Com	3-Future	Prospect	-	98	0	-	-	-
Perspica	4-Beyond	Prospect	-	98	0	-	-	-
Apteligent	3-Future	Prospect	-	98	0	-	-	-
PredictionIO	4-Beyond	Prospect	0	98	0	-	-	2/20/2020 10:00 AM
Evident.io.	4-Beyond	Prospect	0	98	0	-	4/6/2018 8:04 AM	9/6/2019 2:30 PM
RedLock	3-Future	Prospect	-	98	0	-	-	-
E8 Security	4-Beyond	Prospect	-	98	0	-	-	-
Parature, Inc.	4-Beyond	Prospect	-	98	0	-	-	-

Filtered by Account Owner
View Report (No/Low Engagement & High Intent)

Salesforce Lightning Component Configuration (requires 4.4 managed package)

The final step is to leverage People.ai's new Salesforce Experience to add the Account 360 lightning component to the layout of the Account Record page

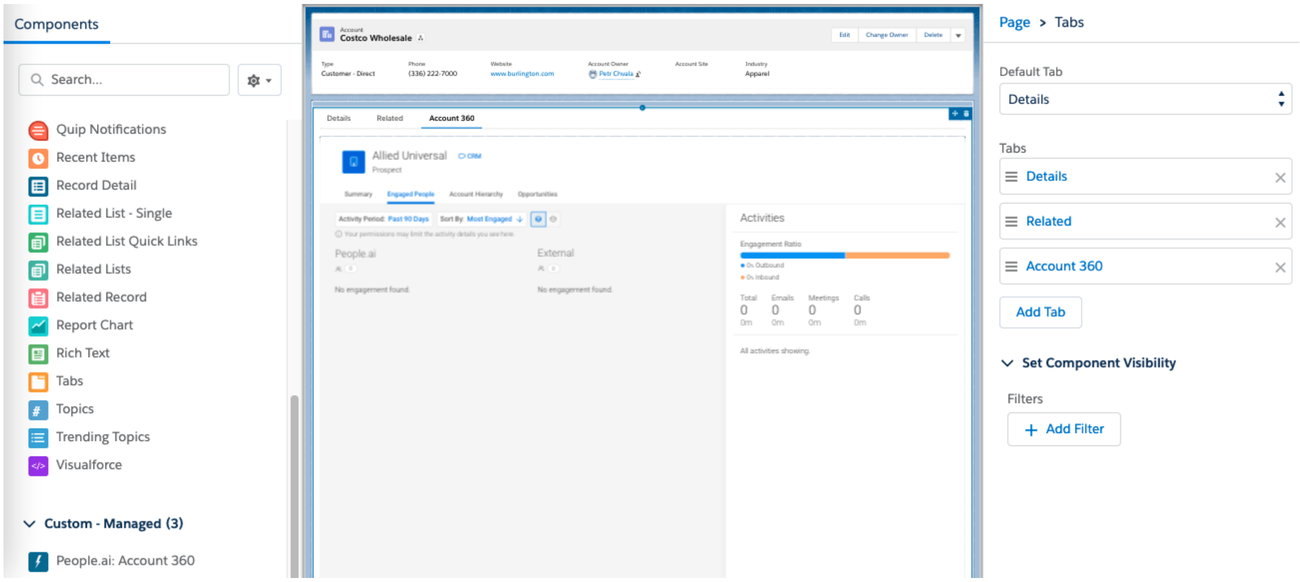
****You must be on Managed Package 4.4 to enable the Account 360 component**

Account 360 Component

Account 360 component is meant to be placed only on the Account Record Lightning Page. Following steps illustrate the default way how to embed this component. but the actual position might differ based on your setup.

1. Open any existing Account record
2. Click the Setup button to reveal the menu and click Edit Page
3. In the preview, locate the Tabs component and add new Tab labeled "Account 360". (If you don't use tabs in the record page, just skip this step)

4. Find People.ai: Account 360 item In the Components list and drag it into the newly created tab or any other preferred place
5. Use the “Set Component Visibility” to limit the layout to the target People.ai users who have access to the People.ai web application
6. Click Save button.
    a. In case you are prompted to activate the page, please do so and assign it as Org default.
7. You can return back to Account by clicking back button in top left corner.



Enabling your Sellers on the new workflow

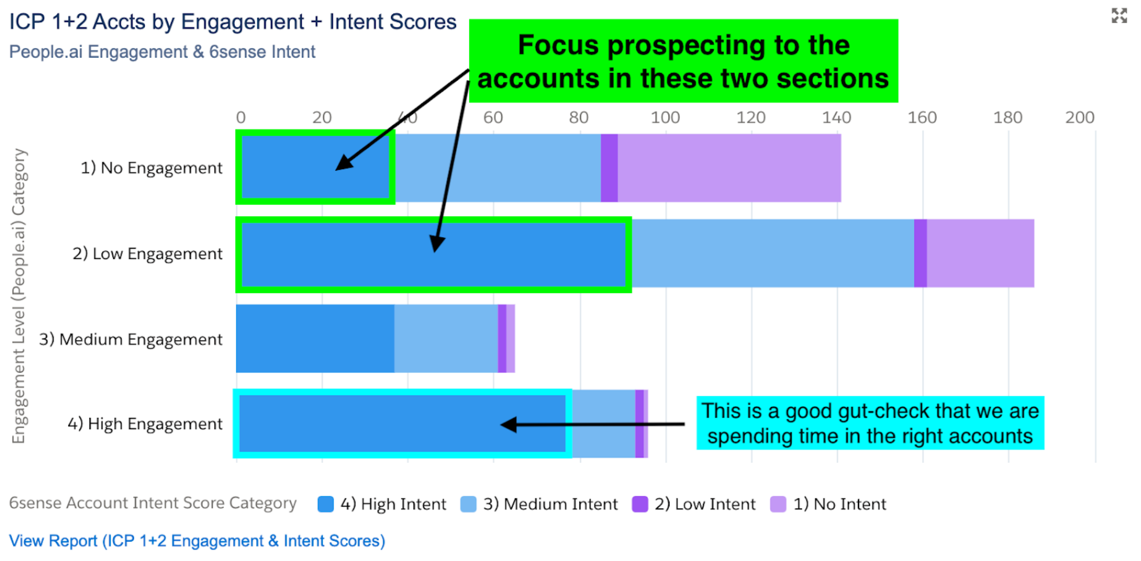
Your Field Rep and Sales Development Reps should use this dashboard to identity Accounts where they should be focusing on.

Open the Account Engagement & Intent Dashboard in Salesforce.

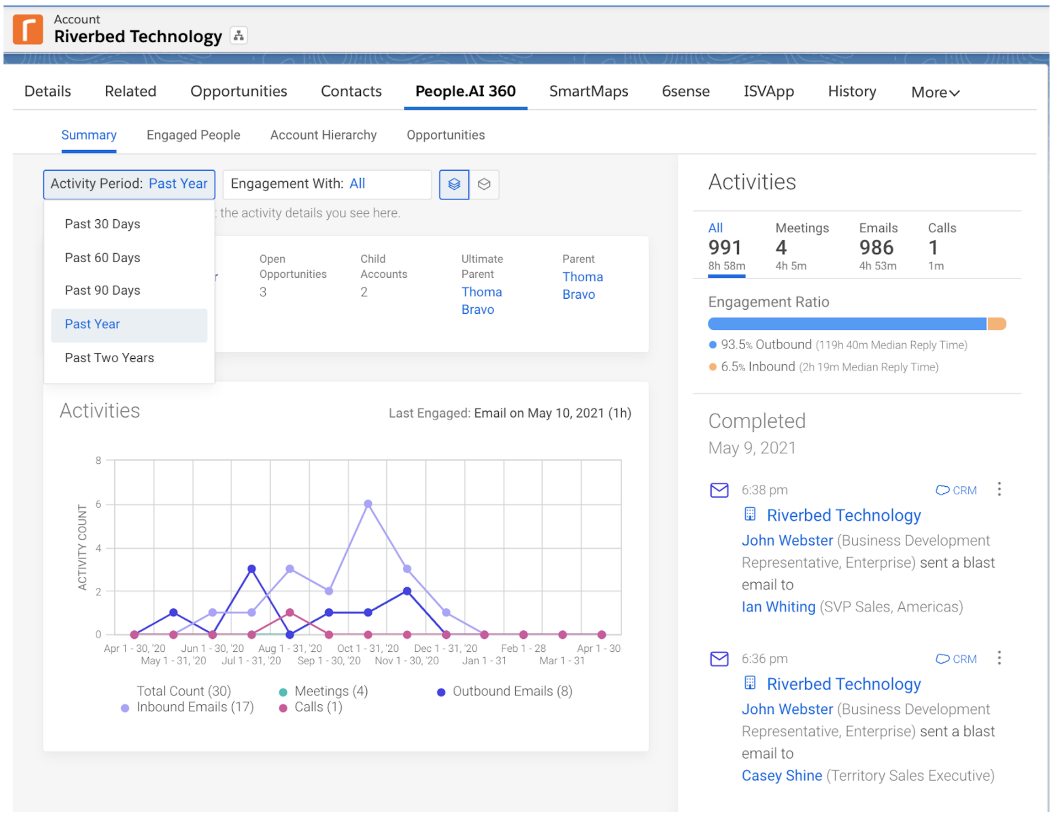
Here is an example flow you can use to enable your teams:

1. Get an overview of which category your accounts fall in
    a. Note: The categories are No, Low, Medium & High scores.

2. Focus prospecting to the accounts with No or Low Engagement levels but High Intent Scores

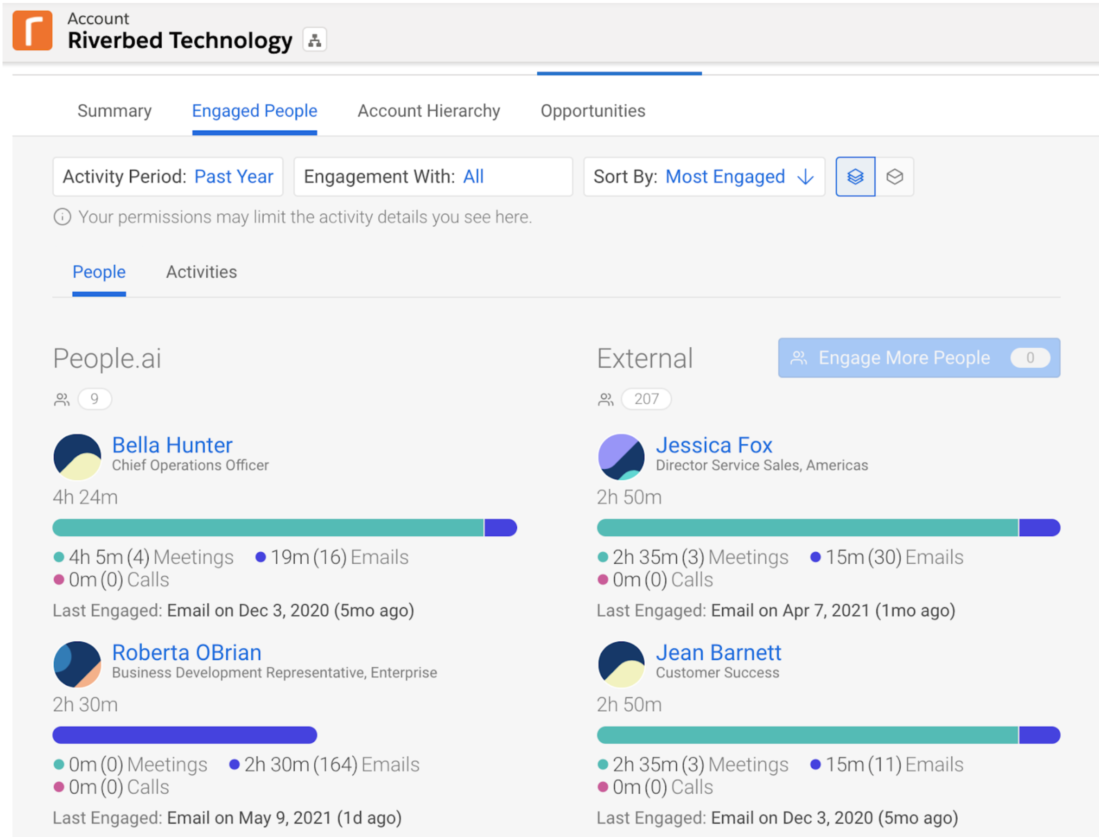


3. Do a quick gut-check to see if the accounts we have high engagement with also have high intent
4. Look at My Accounts To Focus On, which shows all of the accounts in you territory that have No or Low Engagement but High Intent scores.
    a. Note: Reps will only see accounts that they are the Account Owner for.
5. When you see an Account that you'd like to target open up the Account record and click on the "People.ai" 360 tab



a. Use the "Activity Selector" to select "Past One Year" and use the sidebar and select the "Meetings" tab to see what meeting have happened in the past year with the Account

6. Select the "Engaged People" tab to see a summary of all the internal sellers and external buyers that have been involved in activities over the past year



Sales Managers and SDR Managers should use this dashboard during their 1:1's with their team to discuss what accounts should be focused on and establish a strategy in partnership with their reps to strategically maximize their time & effort!