

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

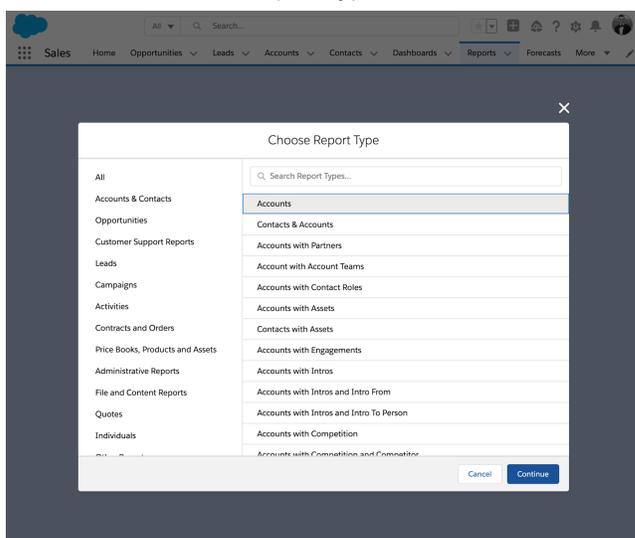
This workflow requires setting up the following:

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

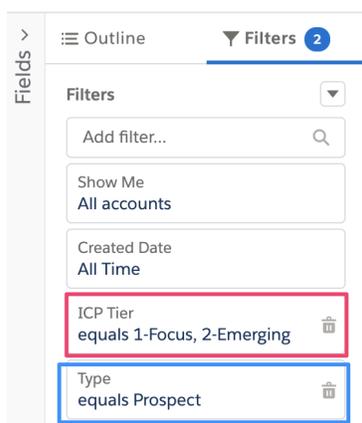
Salesforce Report Setup (only requires 3.11 managed package)

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

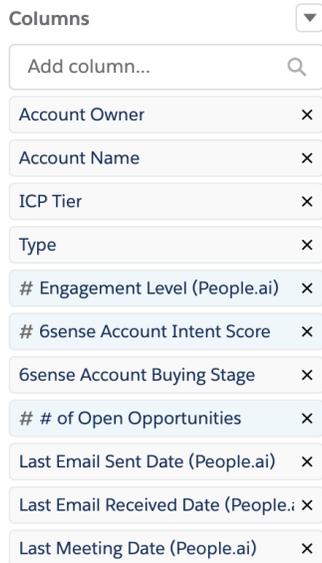


Example Filters

Field for "Target Accounts"

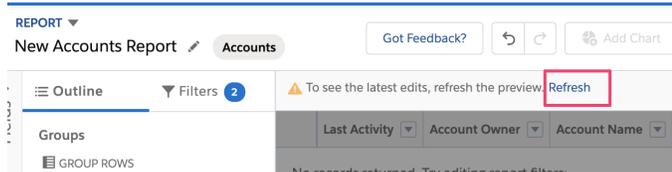
Field to target "Prospect Accounts"

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



a.

5. Click Refresh

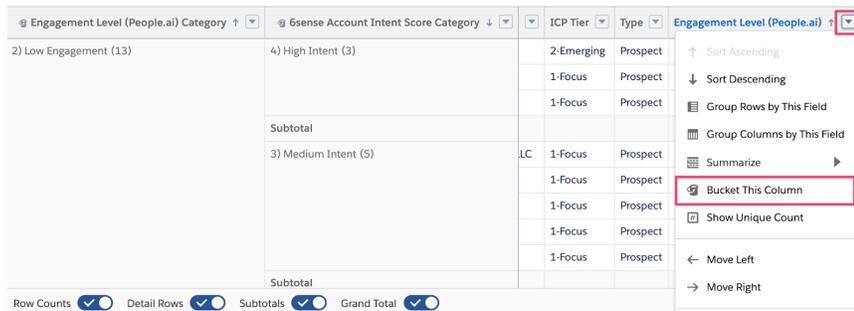


a.

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)

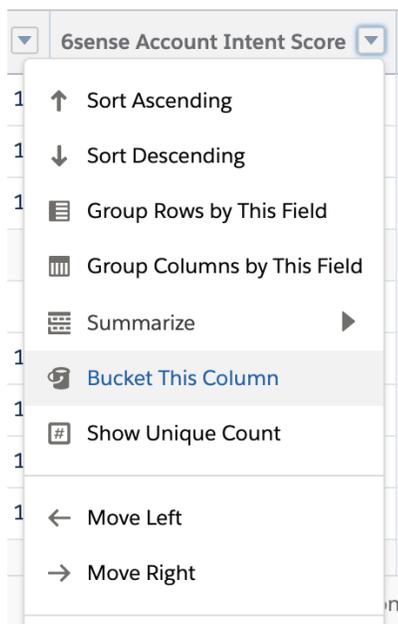
Edit Bucket Column

*Field: Engagement Level (People.ai) × *Bucket Name: Engagement Level (People.ai) Category

	Range	Bucket	
<input type="button" value="Add"/>	<= 0	1) No Engagement	×
<input type="button" value="Add"/>	> 0 to 33	2) Low Engagement	×
<input type="button" value="Add"/>	> 33 to 66	3) Medium Engagement	×
	> 66	4) High Engagement	×

Treat empty Engagement Level (People.ai) values in the report as zeros.

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"



- 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)

Edit Bucket Column

*Field: 6sense Account Intent Score × *Bucket Name: 6sense Account Intent Score Category

	Range	Bucket	
Add ▶	<= 0	1) No Intent	×
Add ▶	> 0 to 33	2) Low Intent	×
Add ▶	> 33 to 70	3) Medium Intent	×
	> 70	4) High Intent	×

Treat empty 6sense Account Intent Score values in the report as zeros.

[Cancel](#) [Apply](#)

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

REPORT ▼
ICP 1+2 Engagement & Intent Scores

Fields > **Outline** **Filters 2**

GROUP ROWS

Add group... 🔍

Engagement Level (People.ai) C ×

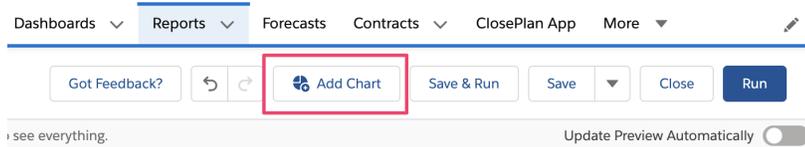
6sense Account Intent Score C ×

GROUP COLUMNS

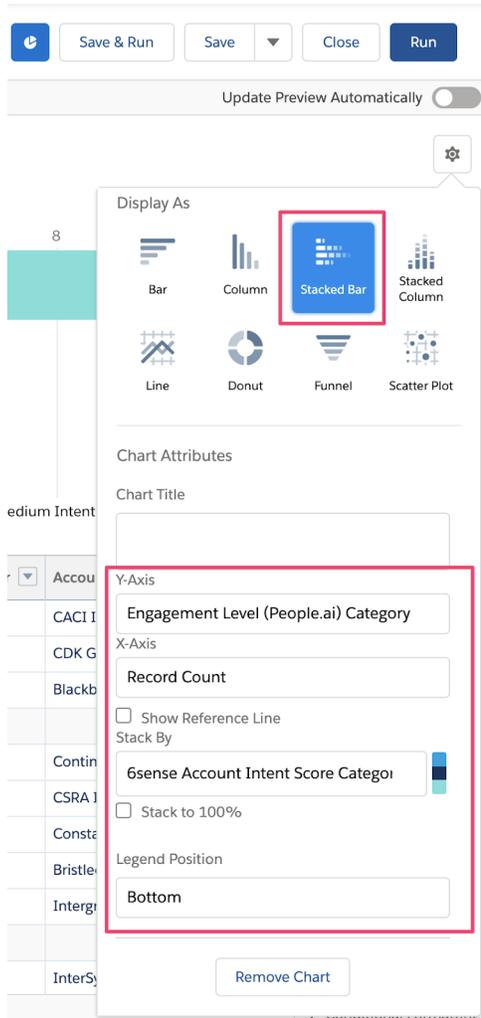
Add group... 🔍

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

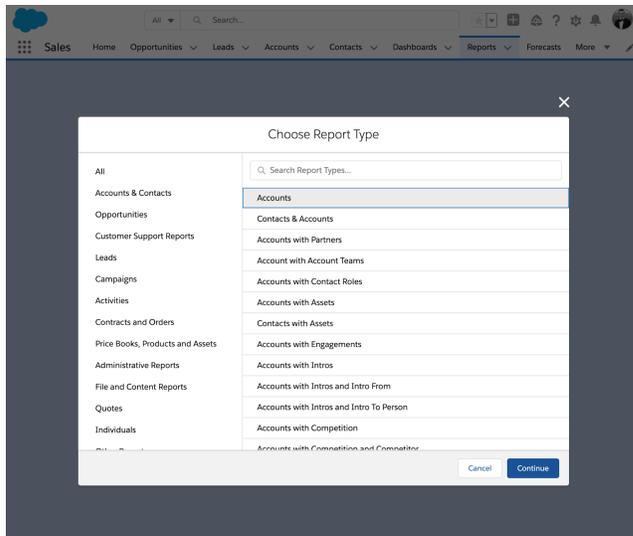


10. Now Click "Save & Run" and finish naming the report "Target Account Engagement & Intent Scores" and save the appropriate folder.

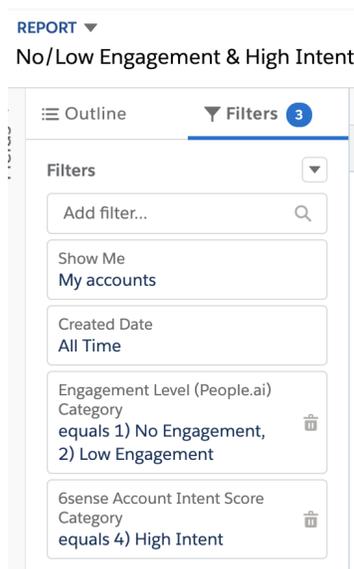
Report #2 - No/Low Engagement & High Intent

1. Go to Reports and click "New Report"

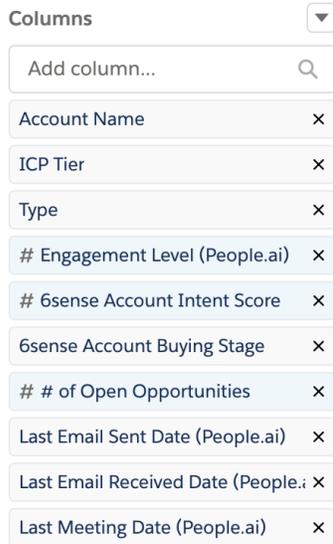
2. Select the "Accounts" report type and click "Continue"



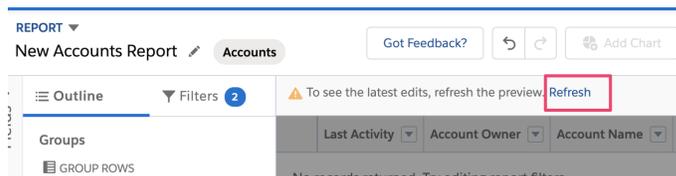
3. Adjust the Filters tab to reflect the following:



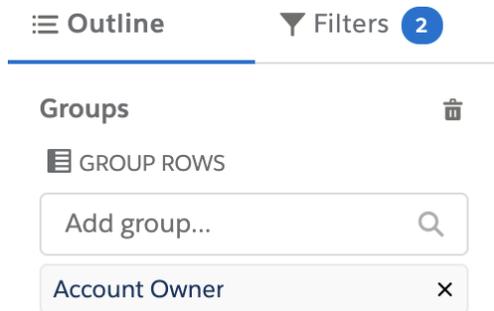
4. Click on the "Outline" and find the "Column" section and add the following fields via the Column search bar



5. Click Refresh



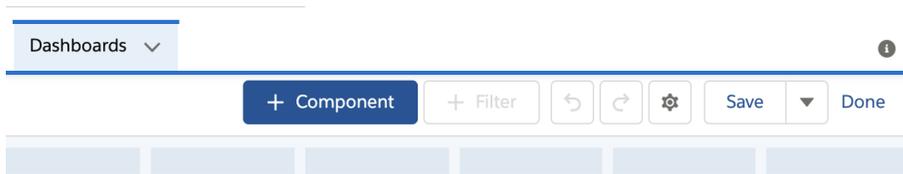
6. Add the Account Owner field in the "Group Rows" section of the outline



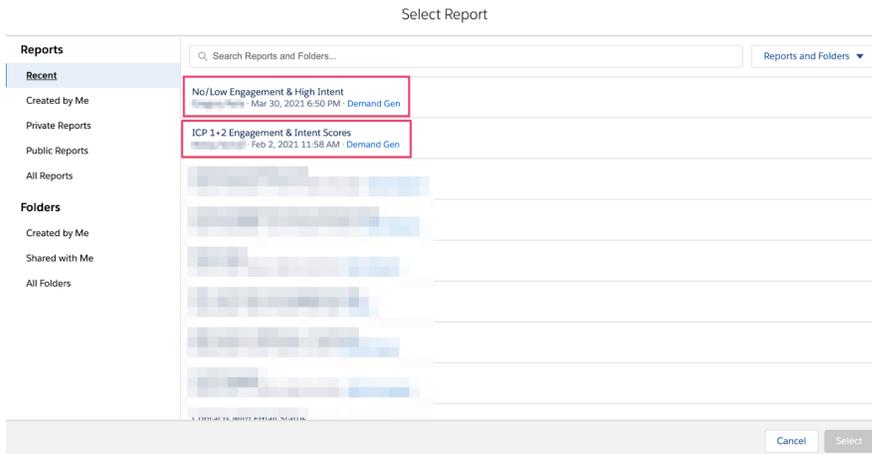
7. Click "Save & Run" and save it as "No/Low Engagement & High Intent"

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"

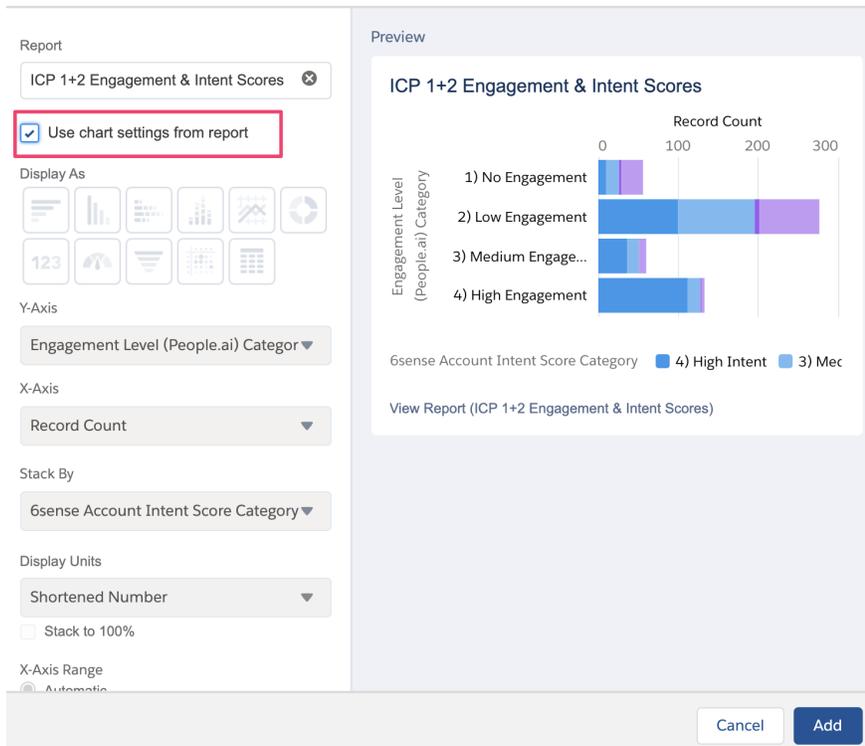


- Find the “ICP 1+2 Engagement & Intent Scores” report that was created in the previous step and click “Select”



- Then check the box for “Use chart settings from report” and click “Add”

Add Component



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



- Click "+ Component" again and find the report called "No/Low Engagement & High Intent"
- Adjust the settings as follows:

Edit Component

Report

No/Low Engagement & High Intent ✕

Use chart settings from report i

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

Decimal Places
Automatic

Custom Link

Max Groups Displayed
100

Title
My Accounts To Focus On

Subtitle
No/Low Engagement & High Intent

Footer
Filtered by Account Owner

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	JCP Tier	Type	Engagement Level (People.ai)	Sense Account Intent Score ⁴	# 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	-	-
Apptelligent	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	-	-
EB 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

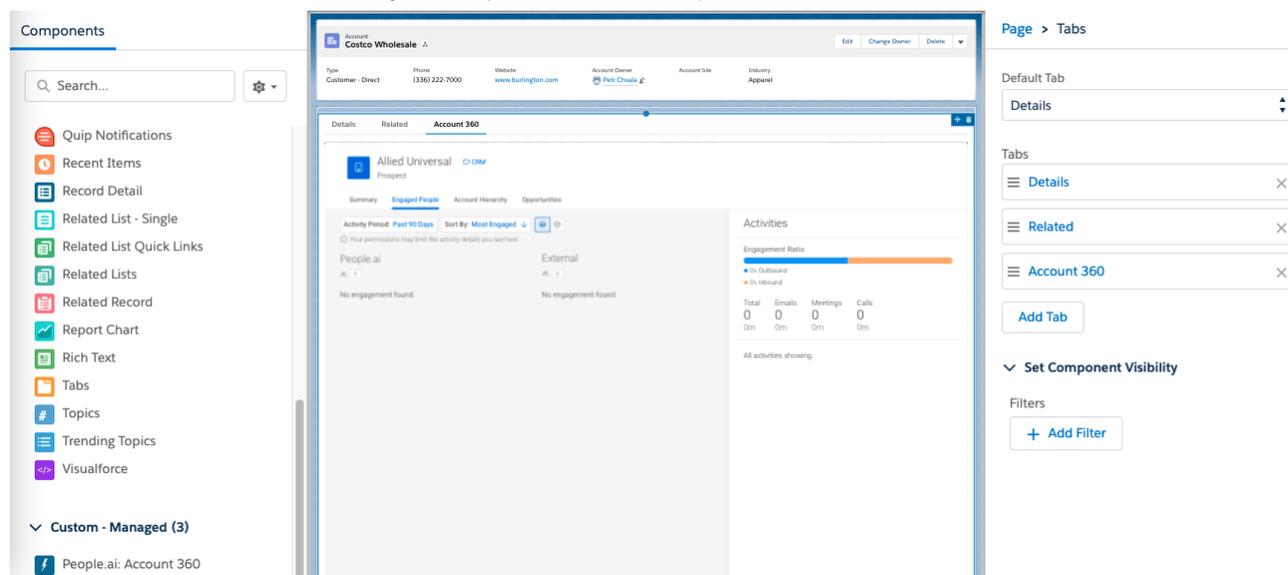
****You must be on Managed Package 4.4 to enable the Account 360 component**

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

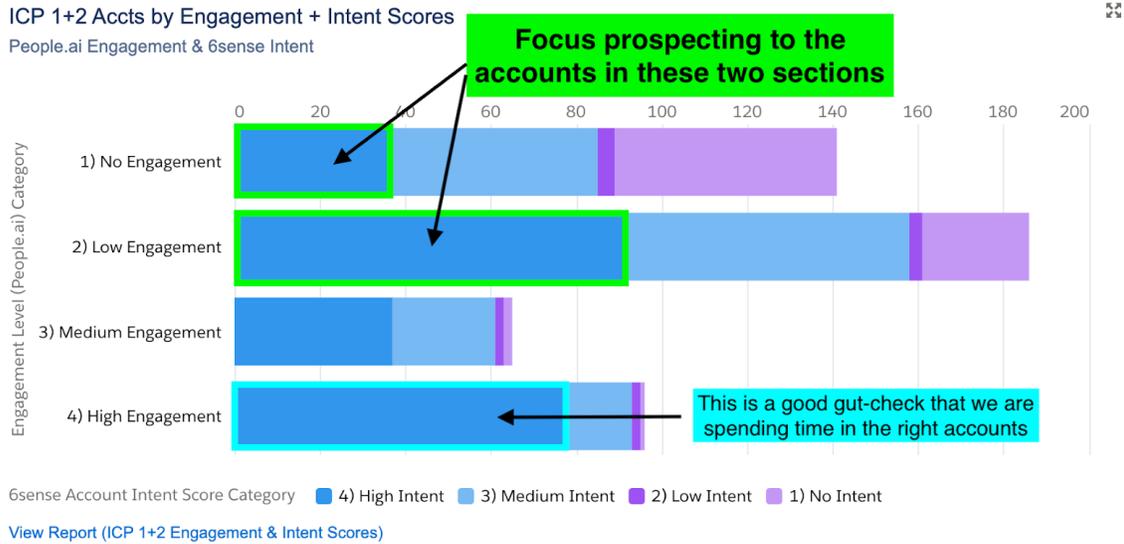
Your Field Rep and Sales Development Reps should use this dashboard to identify Accounts where they should be focusing on.

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 your 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

Account: Riverbed Technology

Details | Related | Opportunities | Contacts | **People.AI 360** | SmartMaps | 6sense | ISVApp | History | More

Summary | Engaged People | Account Hierarchy | Opportunities

Activity Period: Past Year | Engagement With: All

the activity details you see here.

Open Opportunities	Child Accounts	Ultimate Parent	Parent
3	2	Thoma Bravo	Thoma Bravo

Activities

All	Meetings	Emails	Calls
991	4	986	1
8h 58m	4h 5m	4h 53m	1m

Engagement Ratio

- 93.5% Outbound (119h 40m Median Reply Time)
- 6.5% Inbound (2h 19m Median Reply Time)

Completed
May 9, 2021

- 6:38 pm **Riverbed Technology**
John Webster (Business Development Representative, Enterprise) sent a blast email to Ian Whiting (SVP Sales, Americas)
- 6:36 pm **Riverbed Technology**
John Webster (Business Development Representative, Enterprise) sent a blast email to Casey Shine (Territory Sales Executive)

Activities | Last Engaged: Email on May 10, 2021 (1h)

ACTIVITY COUNT	Legend
30	Total Count
17	Inbound Emails
4	Meetings
1	Calls
8	Outbound Emails

- 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

Account: Riverbed Technology

Summary | **Engaged People** | Account Hierarchy | Opportunities

Activity Period: **Past Year** | Engagement With: **All** | Sort By: **Most Engaged**

ⓘ Your permissions may limit the activity details you see here.

People | Activities

Category	Count	Engage More People
People.ai	9	0
External	207	0

Name	Title	Engagement	Meetings	Emails	Calls	Last Engaged
Bella Hunter	Chief Operations Officer	4h 24m	4h 5m (4)	19m (16)	0m (0)	Email on Dec 3, 2020 (5mo ago)
Roberta OBrian	Business Development Representative, Enterprise	2h 30m	0m (0)	2h 30m (164)	0m (0)	Email on May 9, 2021 (1d ago)
Jessica Fox	Director Service Sales, Americas	2h 50m	2h 35m (3)	15m (30)	0m (0)	Email on Apr 7, 2021 (1mo ago)
Jean Barnett	Customer Success	2h 50m	2h 35m (3)	15m (11)	0m (0)	Email on Dec 3, 2020 (5mo ago)

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!