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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"

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- 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:

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- 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

ls <	≔ Outline	Filters 2	Example Filters
Field	Filters	•	
	Add filter	Q	
	Show Me All accounts		
	Created Date All Time		
	ICP Tier equals 1-Focus,	2-Emerging	Field for "Target Accounts"
	Type equals Prospect	Ê	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

Columns	▼
Add column	Q
Account Owner	×
Account Name	×
ICP Tier	×
Туре	×
# Engagement Level (People.ai)	×
# 6sense Account Intent Score	×
6sense Account Buying Stage	×
# # of Open Opportunities	×
Last Email Sent Date (People.ai)	×
Last Email Received Date (People	.i X
Last Meeting Date (People.ai)	×

a. 5. Click Refresh

a.

REPORT New Accounts R	eport 💉 Account	s	Got Fe	edback?	5	¢	Add Chart
≔ Outline	Filters 2	🛕 To see t	ne latest edi	ts, refresh ti	he prev	iew. Re	efresh
Groups		Last	Activity 💌	Account	Owner	•	Account Name 💌
GROUP ROWS		No record	ls roturpod	Try oditing	Tropor	t filton	c.

- 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"

g Engagement Level (People.ai) Category 🕇 💌	Gsense Account Intent Score Category ↓ ▼	•	ICP Tier 💌	Туре 💌	Engagement Level (People.ai) 1
2) Low Engagement (13)	4) High Intent (3)		2-Emerging	Prospect	↑ Sort Ascending
			1-Focus	Prospect	↓ Sort Descending
			1-Focus	Prospect	Group Rows by This Field
	Subtotal				Group Columns by This Field
	3) Medium Intent (5)	.LC	1-Focus	Prospect	III Summarize
			1-Focus	Prospect	Bucket This Column
			1-Focus	Prospect	Show Unique Count
			1-Focus	Prospect	Show onique count
			1-Focus	Prospect	← Move Left
	Subtotal				→ Move Right
Row Counts 💙 Detail Rows 💙 Subt	otals 🗸 🔿 Grand Total 🗸				

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 Bu	cket Column	
Field			* Bucket Name		
Engagem	nent Level (Peop	ole.ai) ×	Engagement Le	vel (People.ai) Category	
	Range			Bucket	
	<=	0		1) No Engagement	×
Add ►	> 0 to	33		2) Low Engagement	×
Ada	> 33 to	66		3) Medium Engagement	×
Add 🕨	>	66		4) High Engagement	×



- 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)

ield		* Bucket Name		
isense A	ccount Intent So	core × 6sense Acco	unt Intent Score Category	
	Range		Bucket	
	<=	0	1) No Intent	×
	> 0 to	33	2) Low Intent	×
	> 33 to	70	3) Medium Intent	×
dd 🕨		70	4) High Intent	×

Apply
l

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



9. Click the Chart button in the report builder

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Dashboards 🗸	Reports 🗸	Forecasts Contra	cts 🗸 🛛 ClosePlan App	More 💌	, de t
Got Feedb	ack? 5	名 Add Chart	Save & Run Save	Close	Run
see everything.			Uţ	odate Preview Autom	atically

b. Click Refresh again and then click the 'Chart Properties" icon and input the following details

¢	Sav	e & Run	Save	•	Close	Run			
			Upda	ate Pre	view Autom	atically			
	\$								
		Display As	5			,			
	8	Bar	Colur	nn	Stacked Bar	Stacked			
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	CDK G	Record (Count						
	Blackb	Show F	Reference	Line					
	Contin	6sense Account Intent Score Catego							
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	Consta	5 State to 100%							
	Bristle	Legend Po	sition						
	Intergr	Bottom							
	InterSy		Re	move (Chart				

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"

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

P	All 👻 🔍 Search	× · · · · · · · · · · · · · · · · · · ·	* + 🔴
Sales	Home Opportunities 🗸 Leads 🗸	Accounts v Contacts v Dashboards v Reports v Forecast	More 🔻 🆋
			×
			9
		Choose Report Type	
	All	Q, Search Report Types	
	Accounts & Contacts	Accounts	·
	Opportunities	Contacts & Accounts	-
	Customer Support Reports	Accounts with Partners	
	Leads	Account with Account Teams	
	Campaigns	Accounts with Contact Roles	
	Activities	Accounts with Assets	
	Contracts and Orders	Contacts with Assets	
	Price Books, Products and Assets	Accounts with Engagements	
	Administrative Reports	Accounts with Intros	
	File and Content Reports	Accounts with Intros and Intro From	
	Quotes	Accounts with Intros and Intro To Person	
	Individuals	Accounts with Competition	
	01 5 1	Accounts with Compatition and Compatitor	
		Cancel 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

Columns	
Add column	٦
Account Name	×
ICP Tier	×
Туре	×
# Engagement Level (People.ai)	×
# 6sense Account Intent Score	×
6sense Account Buying Stage	×
# # of Open Opportunities	×
Last Email Sent Date (People.ai)	×
Last Email Received Date (People.	×
Last Meeting Date (People.ai)	×

5. Click Refresh

F	REPORT V New Accounts Re	port 🖌 Account	s	Got F	eedback?	් ්	Add Chart]
	≔ Outline	Filters 2	A T	o see the latest ed	its, refresh 1	the preview.	Refresh	
222	Groups			Last Activity 💌	Account	Owner 💌	Account Name 💌	E
	GROUP ROWS		No	records returned	Tru oditio	g raport filt		

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

≔ Outline	Filters 2
Groups	â
Add group	Q
Account Owner	×

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"

Dashboards 🗸						0
	+ Component	+ Filter	5	\$ Save	•	Done

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

	Select Report						
Reports	Q, Search Reports and Folders	Reports and Folders 🔻					
Recent							
Created by Me	No/Low Engagement & High Intent - Mar 30, 2021 6:50 PM - Demand Gen						
Private Reports	ICP 1+2 Engagement & Intent Scores						
Public Reports	· Feb 2, 2021 11:58 AM · Demand Gen						
All Reports							
Folders							
Created by Me							
Shared with Me							
All Folders	C.C.C.C.C.C.C.						
	STOR						
	L ODTACTS WITH PITTAIL STATUS						
		Cancel Select					

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

Report	Preview ICP 1+2 Engagement & Intent Scores								
ICP 1+2 Engagement & Intent Scores									
Use chart settings from report Display As	Record Count 0 100 200 300 1) No Engagement 2) Low Engagement 3) Medium Engage 4) High Engagement								
Engagement Level (People.ai) Categor X-Axis	6sense Account Intent Score Category 4) High Intent 3) Mec								
Record Count									
Stack By									
Display Units									
Shortened Number 🔹									
Stack to 100%									
X-Axis Range									
	Cancel Add								

Add Component

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	Preview
No/Low Engagement & High Intent Use chart settings from report	My Accounts To Focus On No/Low Engagement & High Intent
Display As	We can't draw this chart because there is no data.
Groups	
Add group	Filtered by Account Owner View Report (No/Low Engagement & High Intent)
Account Name ×	1
ICP Tier ×	
Type ×	
Engagement Level (People.ai) ×	
6sense Account Intent Score X	
# of Open Opportunities ×	
Last Email Sent Date (People.ai) \times	
Last Email Received Date (People.ai) $ imes$	
Last Meeting Date (People.ai) X	
Sort By	
	Cancel



Decimal Places									
Automatic									
Custom Link									
Max Groups Displayed									
100									
Title	٦								
My Accounts To Focus On									
Subtitle	ī								
No/Low Engagement & High Intent									
Footer	Ī								
Filtered by Account Owner									
						Ca	ncel	Upda	te

- 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	Туре	Engagement Level (People.ai)	6sense Account Intent Score 👃	# of Open Opportunities	Last Email Sent Date (People.ai)	Last Email Received Date (People.al)	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			
Fillered by Account Owner Verw Report (NoL.cw 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.

Components	Costco Wholesale A for Ourge Owner Dates v	Page > Tabs
Q Search		Default Tab
 Q. Search Quip Notifications Q. Recent Items Record Detail Related List - Single Related List Quick Links Related Lists Related Record Report Chart Rich Text Tabs 	Contener: Direct D	Default Tab Details + Tabs E Details × Related × E Account 360 × Add Tab Set Component Visibility Filters
 Prevention of the second second		+ Add Filter

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

Riverbed Technology	
Summary Engaged People Account Hierarchy	Opportunities
Activity Period: Past Year Engagement With: All	Sort By: Most Engaged \downarrow 😣 \diamondsuit
③ Your permissions may limit the activity details you see here.	
People Activities	
People.ai	External Rigage More People
R 9	R (207)
Bella Hunter	Jessica Fox
4h 24m	2h 50m
 4h 5m (4) Meetings 19m (16) Emails 0m (0) Calls 	● 2h 35m (3) Meetings ● 15m (30) Emails ● 0m (0) Calls
Last Engaged: Email on Dec 3, 2020 (5mo ago)	Last Engaged: Email on Apr 7, 2021 (1mo ago)
Roberta OBrian Business Development Representative, Enterprise	Jean Barnett Customer Success
2h 30m	2h 50m
 0m (0) Meetings 2h 30m (164) Emails 0m (0) Calls 	● 2h 35m (3) Meetings ● 15m (11) Emails ● 0m (0) Calls
Last Engaged: Email on May 9, 2021 (1d ago)	Last Engaged: 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!