# "Q for Sales"

## User Guide

Contributors: Robert Williams (bobsanjo@gmail.com), Michael Ye (michael.ye@uniphore.com>,
App new (http://13.57.225.62:8083/) james.flore@apple.com Pegasus123!
App old (https://sunstone-ui-demo-devenv01.apps.uniphorecloud.com/home) | Doc Folder

**– INTERNAL DRAFT – NOT FOR DISTRIBUTION –**

uniphore

Version 1.x

# Contents

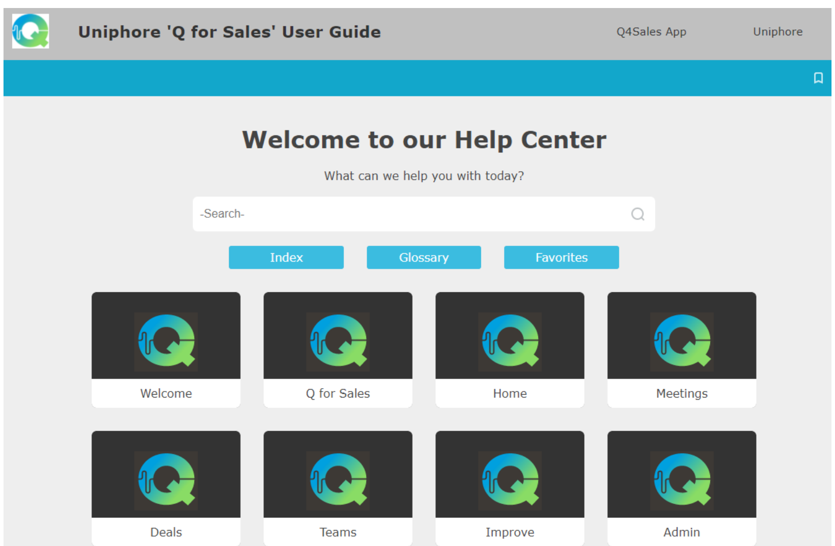
# Documentation Approach

Each page of the “Q for Sales” app is taken as a screenshot, and callouts are added. A table is inserted below the screenshot to describe the callouts. In addition, hyperlinks are added to aid navigation. The screenshots are placeholders until the app is finalized. When the app is finalized, new screens will be taken and annotated with callouts.

To create Online Help, this document will be ported to Framemaker 2019, and context-sensitive help will be generated. The online help distribution will be uploaded to a Uniphore server for general access. If needed, a PDF can also be produced. For collaboration, the document is kept in Google docs until it is mostly complete (>95%), and then it will be ported to Framemaker for online help creation.

Stylistic, branding, and formatting (logos, colors, fonts, etc.) will be addressed when the document is ported to Framemaker and made available as Online Help. This Google doc is for content creation and collaboration, internal to Uniphore.

Sample of what Online Help landing page might look like.



# Overview

“Q for Sales" is Uniphore’s answer to virtual sales challenges. It provides insights into meeting participants' emotional intelligence and correlates the customer EQ to sales deals. As a result, sales reps and leaders can:

- engage customers more effectively
- improve customer reps' sales efficacy
- and drive revenue growth with objective EQ factors and insights

This user guide walks you through the main functional modules and navigation paths of “Q for Sales.”

## About this Document

- Real-Time Sales Assistant: Allows salespeople to conduct their virtual sales meetings with the assistance of the “Q for Sales" Zoom app.
- Post-meeting Analysis: Allows salespeople and revenue operation managers to gain insights into sales meetings and their impact on sales deals.
- “Q for Sales” Online App Information Pages: Home, Meetings, Deals, and so on.

## Contact

For questions about “Q for Sales,” please contact Michael Ye (michael.ye@uniphore.com).

Uniphore
1001 Page Mill Road
Building 4, Suite 100-B
Palo Alto, CA 94304

## Glossary

| | |
|---|---|
| **Admin** | System administrators who will manage the essential system configurations that allow end-users to use the “Q for sales” application. |
| **Convo Stats** | Conversational statistical metrics describing how a sales rep or team has been performing. |
| **Contact** | Refers to the individual contact persons within the customer entity who participate in the sales conversations with the sales team. |
| **Customer** | Refers to the business entity and the related group of people who are being dealt with by the sales team to create a deal. |
| **Deal** | The sales opportunity that sales reps manage through the ongoing sales meetings and conversations with their clients. |
| **Engagement** | Indicates the participants’ degree of engagement during the ongoing conversation |
| **Sentiment** | Indicates the positiveness of participants’ emotional reactions. |
| **EQ (Score)** | Emotional Quotient (EQ), also known as Emotional Intelligence, is a term related to understanding a customer’s thoughts and feelings. Uniphore uses the term EQ as the understanding of a customer's sentiment and engagement as these relate to a deal. The terms EQ and EQ Score are used to mean the same thing. |
| **Manager** | A sales manager using “Q for Sales” and managing a sales team typically composed of sales reps. |
| **MEDDIC** | Sales technique framework used by the sales teams to drive efficient deal processes. |
| **Meeting participant** | A person who attends a meeting and whose EQ is measured and evaluated. They can be the participants from either the customer or the sales team. |
| **Meeting moments** | Moments during the meeting, when certain discussion topics are brought up or meeting participants demonstrate significant emotional swings. |
| **Q for Sales** | Uniphore application that provides insights into meeting participants' emotional intelligence and correlates the customer EQ to sales deals. |
| **Q Score** | A machine-generated performance indicator of a sales rep’s techniques. |
| **Real-time EQ** | The real-time sentiment and engagement status of meeting participants (customer or sales team). |
| **Rep** | Sales Representative from the company using “Q for Sales” as a tool for making deals with customers. |
| **RTBF** | “Right to be forgotten”. The right for end-users or customer contacts to issue requests regarding their personal data privacy. |

# Real-Time Sales Assistance

Once you enable sales reps with “Q for sales,” sales reps and managers will be able to conduct their virtual sales meetings with the assistance of the “Q for Sales" Zoom app. Note the following requirements:

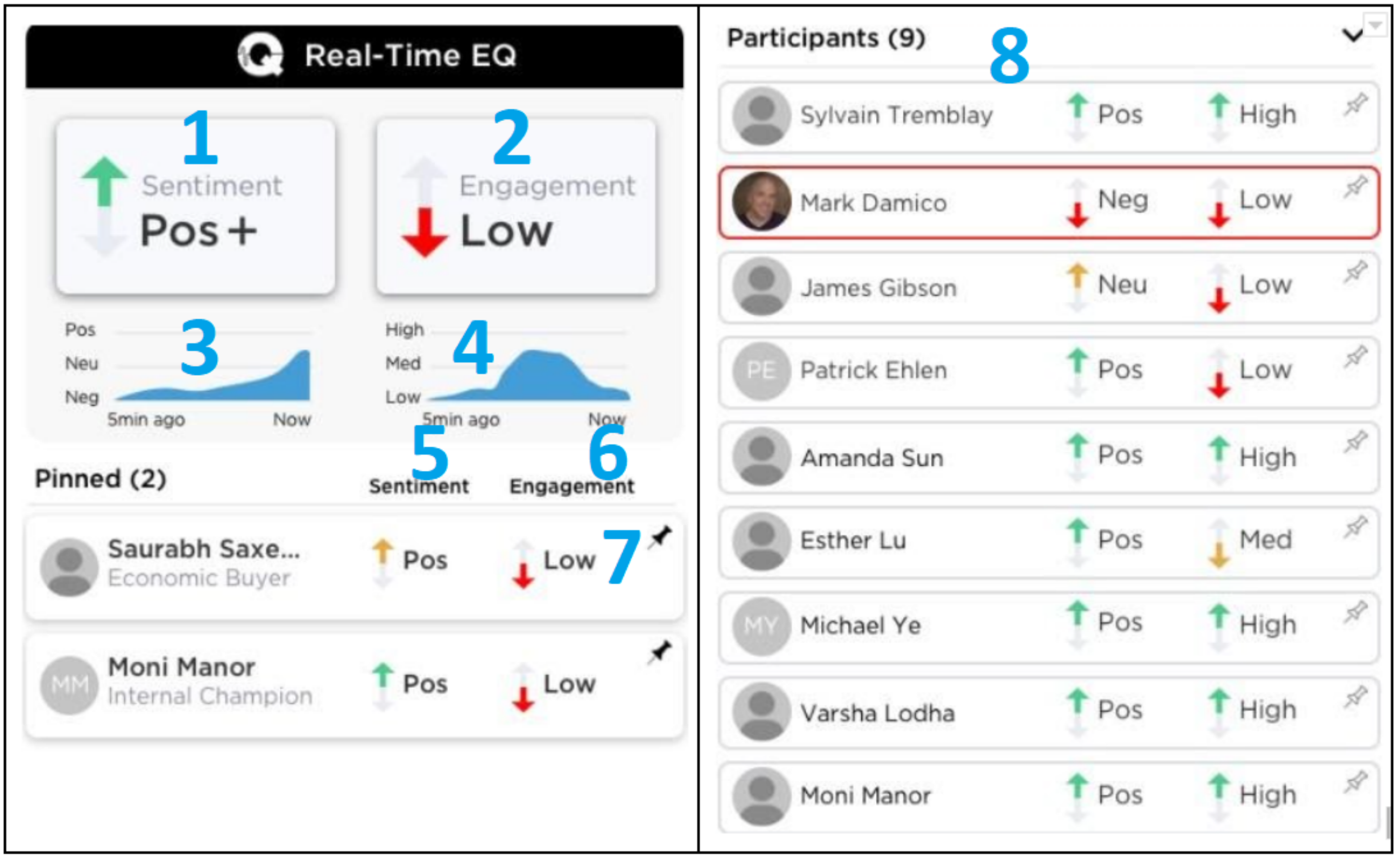
- To fully utilize the capabilities of “Q for Sales,” you should plan your sales meetings with your corporate email/calendar account. Gmail and Office 365 are also supported for email and calendar, however Zoom email is not supported.
- Launch meetings through your corporate Zoom account. No other video conferencing tools are supported.

You can launch the app from Zoom’s App panel. It offers real-time participant EQ monitoring in terms of real-time sentiment and engagement of participants.

- Sentiment indicates the positiveness of participants’ emotional reactions.
- Engagement indicates the participants’ degree of engagement during the ongoing conversation.

> **Important:** The Zoom app will explicitly show a "Q for Sales" meeting recording bot as a meeting participant. If any real person participant is not comfortable with being recorded or monitored, they can bring it to the attention of the meeting organizer. The meeting organizer can either ask that person to leave the meeting or stop the operation of the "Q for Sales" bot if that person must stay in the meeting.

You can see the EQ summary section on the top, indicating the overall sentiment and engagement across all customer participants. It also shows the moving trend of those values within a 5-minute time frame.  Below the summary section, you can monitor the sentiment and engagement of individual participants. You can also pin the critical participants so they stay on the top.

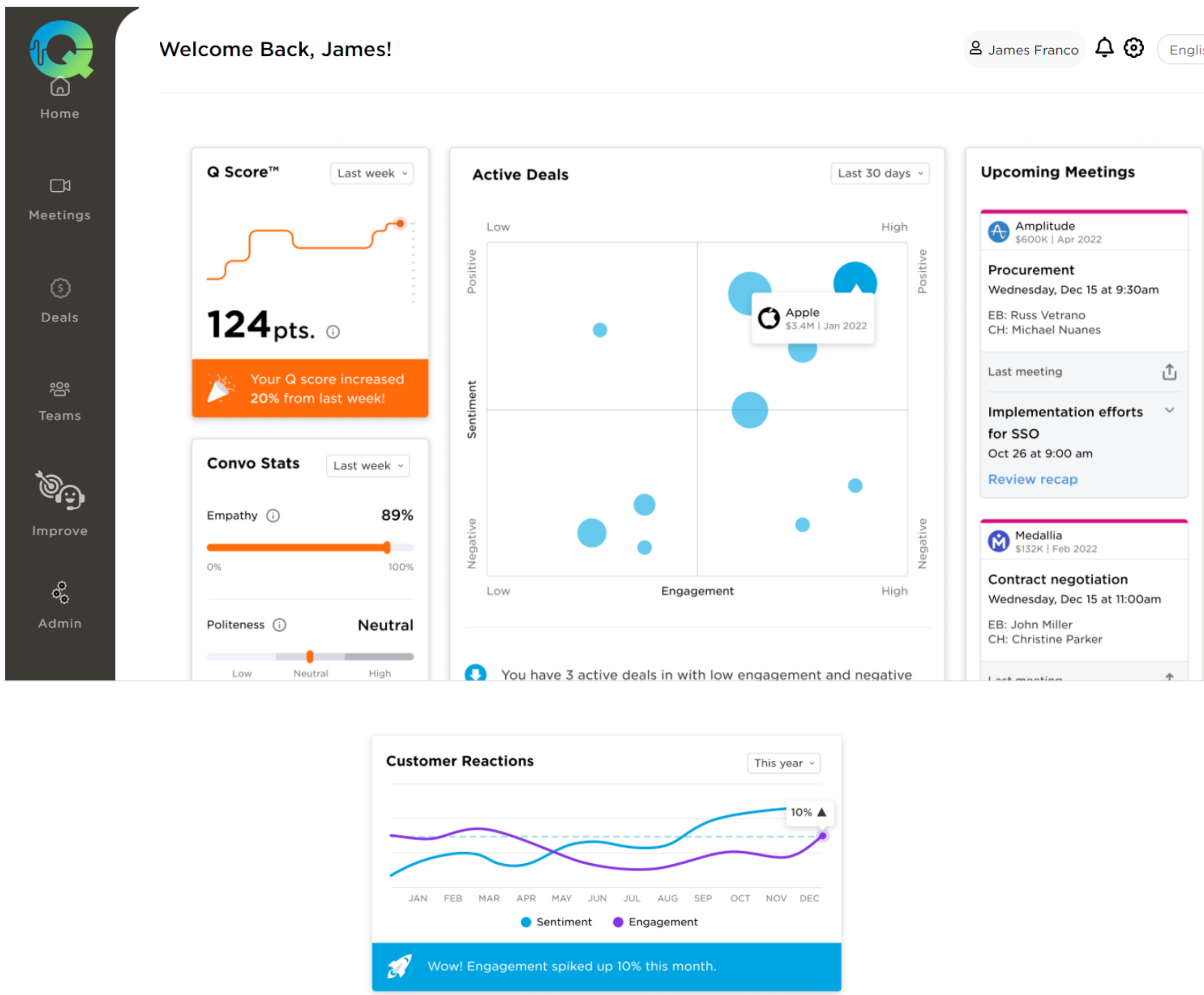



| | | |
|---|---|---|
| **1** | Average Sentiment | Indicates the average of all customer participants' sentiment (emotional reactions) during the ongoing conversation in the past 5 minutes. The arrow indicates the sentiment trend in the last 5 minutes (up = improving / down = deteriorating).<br>• Positive<br>• Neutral<br>• Negative |
| **2** | Average Engagement | Indicates the average of all customer participants' degree of engagement during the ongoing conversation in the past 5 minutes. The arrow indicates the engagement trend in the last 5 minutes (up = improving / down = deteriorating).<br>• High<br>• Medium<br>• Low |
| **3** | Sentiment Trend Graph | The 5-minute trend of all participants' average degree of sentiment. |
| **4** | Engagement Trend Graph | The 5-minute trend of all participants' average degree of engagement. |
| **5** | Individual Sentiment | Indicates the individual participant's sentiment (emotional reactions) during the ongoing conversation in the past 5 minutes. |
| **6** | Individual Engagement | Indicates the individual participant's degree of engagement during the ongoing conversation in the past 5 minutes. |

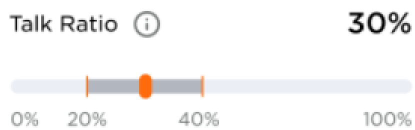
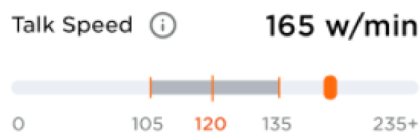
| | | |
|---|---|---|
| **7** | Pin/Unpin | Double-click the pin icon to pin or unpin a person. |
| **8** | Participant Information | Displays summary for individual participants. |

# Home Page

The Home Page provides a one-stop dashboard for sales reps by consolidating the high-level information from Meetings, Deals, and Improve pages. It includes information on Q score (performance indicator), conversational status, active deals, customer reactions, and upcoming meetings.



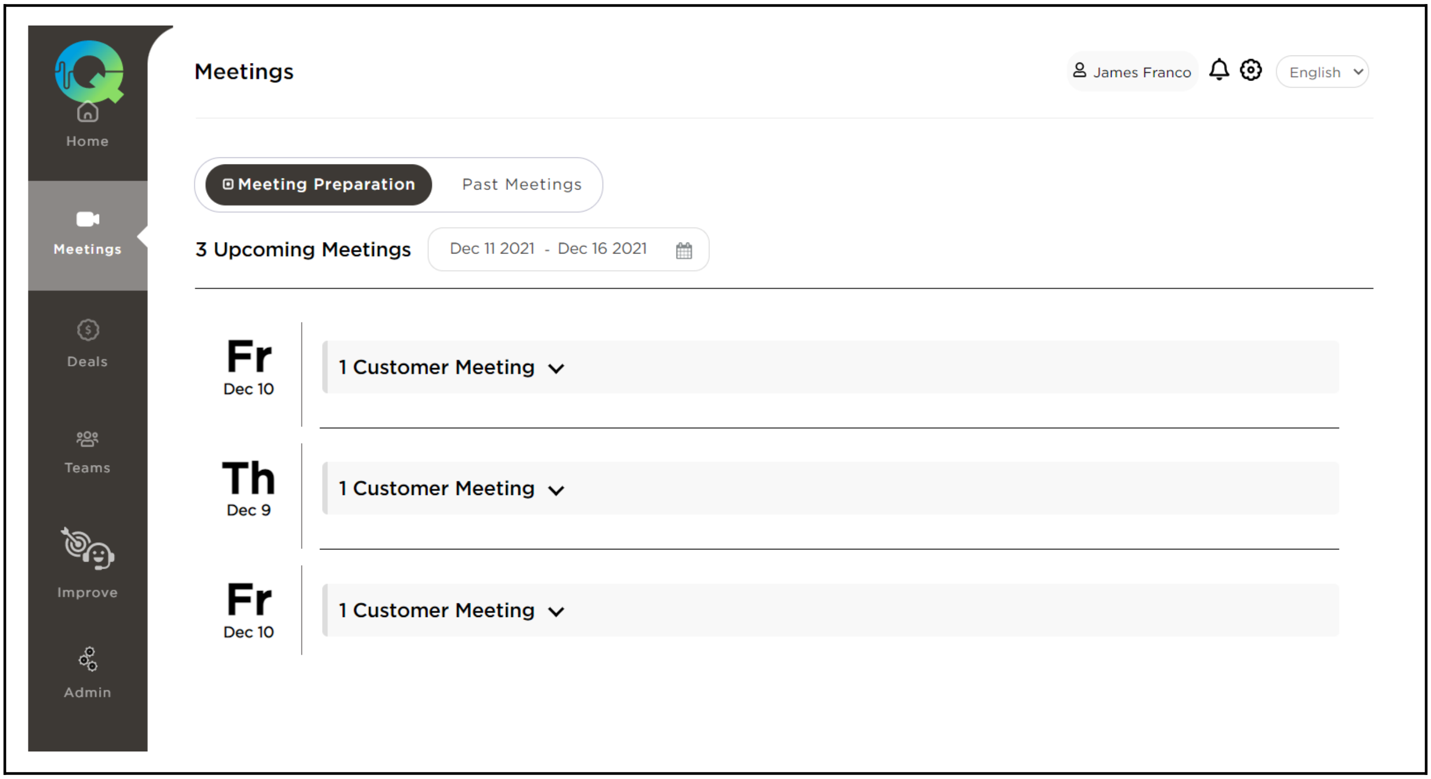

| | | |
|---|---|---|
| **1** | Q Score | A machine-generated performance indicator of a sales rep’s techniques. The orange graph shows a trend of the Q score over a date range (use the pulldown to change the date range). |
| **2** | Convo Stats | Conversational Status shows the average conversational technique levels for meetings in the selected time frame. Use the pulldown to change the time period. The level of each of the following indicators is shown by an orange dot:<br>● Empathy: Shown reps’ empathy toward the customer as a percentage.<br>● Politeness: Shown reps’ politeness toward the customer as low, medium, or high.<br>● Talk Ratio: Talk ratio of rep to customer. The bookended bar shows the ideal talk ratio range. |

| | | |
|---|---|---|
| | |  <br>● Talk Speed: Rep talk speed. The bookended bar shows the ideal talk speed range.<br>  |
| **3** | Active Deals | Shows a 2x2 distribution matrix diagram of all sales deals for a rep. The size of the blue bubble indicates the deal value (a dollar amount). Hover over a bubble to see more information about the deal. The location of the deal in the matrix is based on:<br><br>● Sentiment: On the y-axis (positive up, negative down)<br>● Engagement: On the x-axis (low left, high right)<br><br>As a general rule, deals in the upper right of the matrix are doing better than deals in the lower left. Below the matrix are system-generated messages indicating items the rep should pay attention to regarding the deals in the matrix. |
| **4** | Customer Reactions | Displays a trend graph of the customer EQ reaction indicators for customer sentiment (blue line) and customer engagement (purple line) over a date range. Use the pulldown to change the date range. The values shown are averages across all sales meetings that this sales rep participated in. |
| **5** | Upcoming Meetings | Shows the upcoming meetings by account name, deal amount, close date, deal stage, meeting dates, customer contacts, and customer roles. In addition, below each meeting is the last meeting information (review by clicking the link). |

# Meetings Page

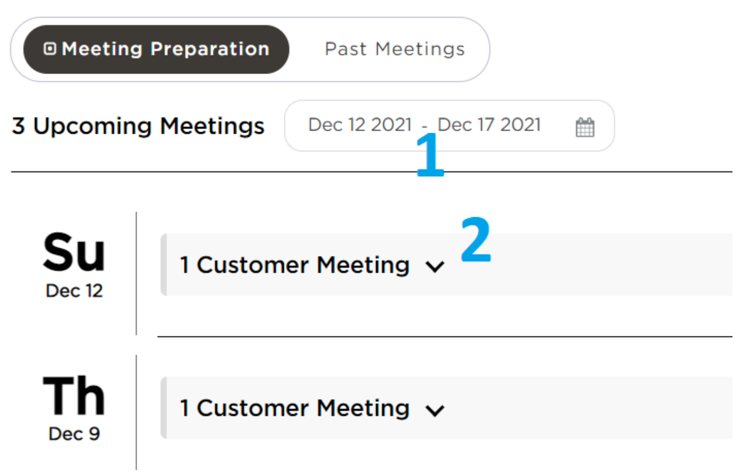
Sales reps can use “Q for Sales" to review past sales meetings and better prepare for upcoming sales meetings. From this page, you can access two tabs:

- [Meeting Preparation](#)
- [Past Meetings](#)

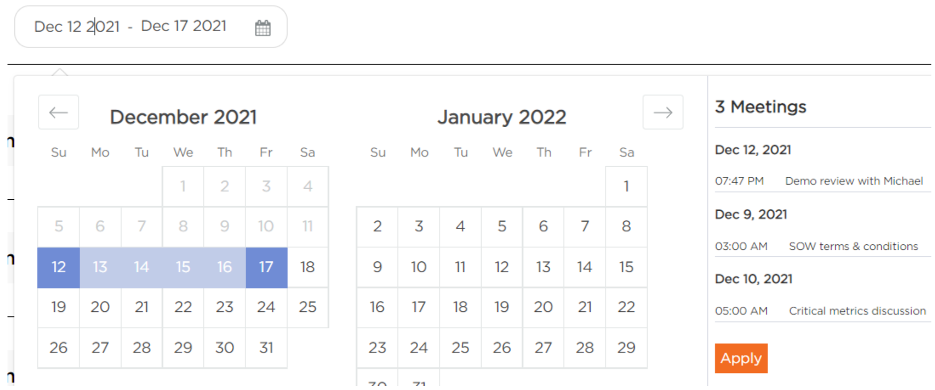



## Meeting Preparation

From the Meetings Preparation tab, you will see a list of the future meetings scheduled for the upcoming days.

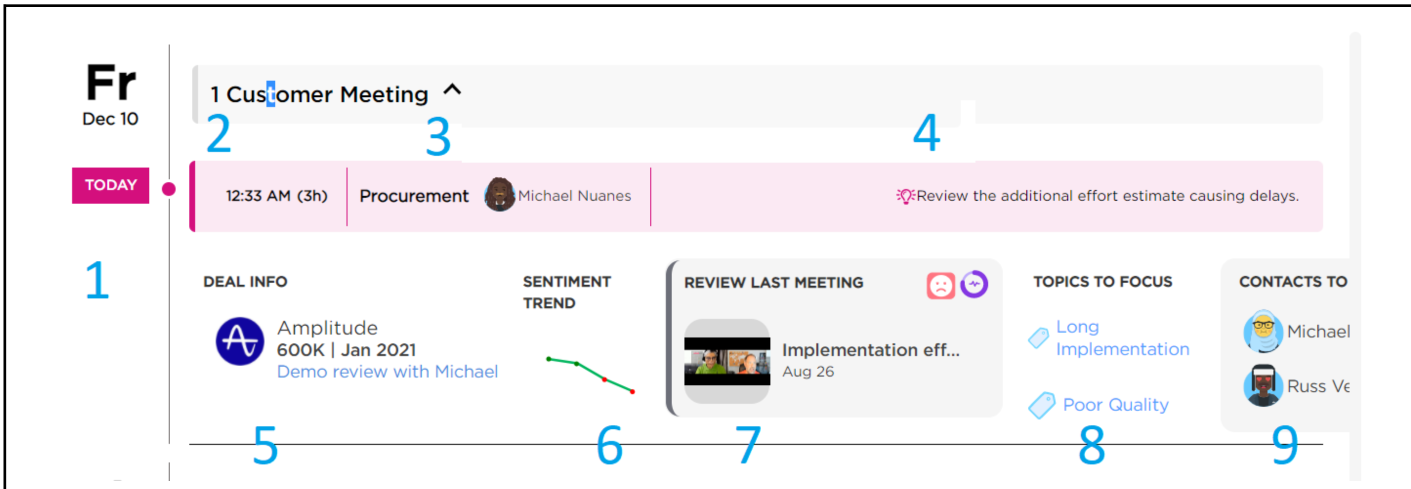



| | | |
|---|---|---|
| 1 | Date Range | Select a date range for the meetings you want to display. Once selected, click the Apply |

| | | |
|---|---|---|
| | | button for the date range to take effect.<br><br> |
| **2** | Expand icon | Click to view a summary of meetings on a specific date. |

## Meeting preparation summary

Click the expand icon to view a summary of an upcoming meeting. The information is designed to help you prepare for upcoming meetings and provides links to other information about the deal, including past meetings.

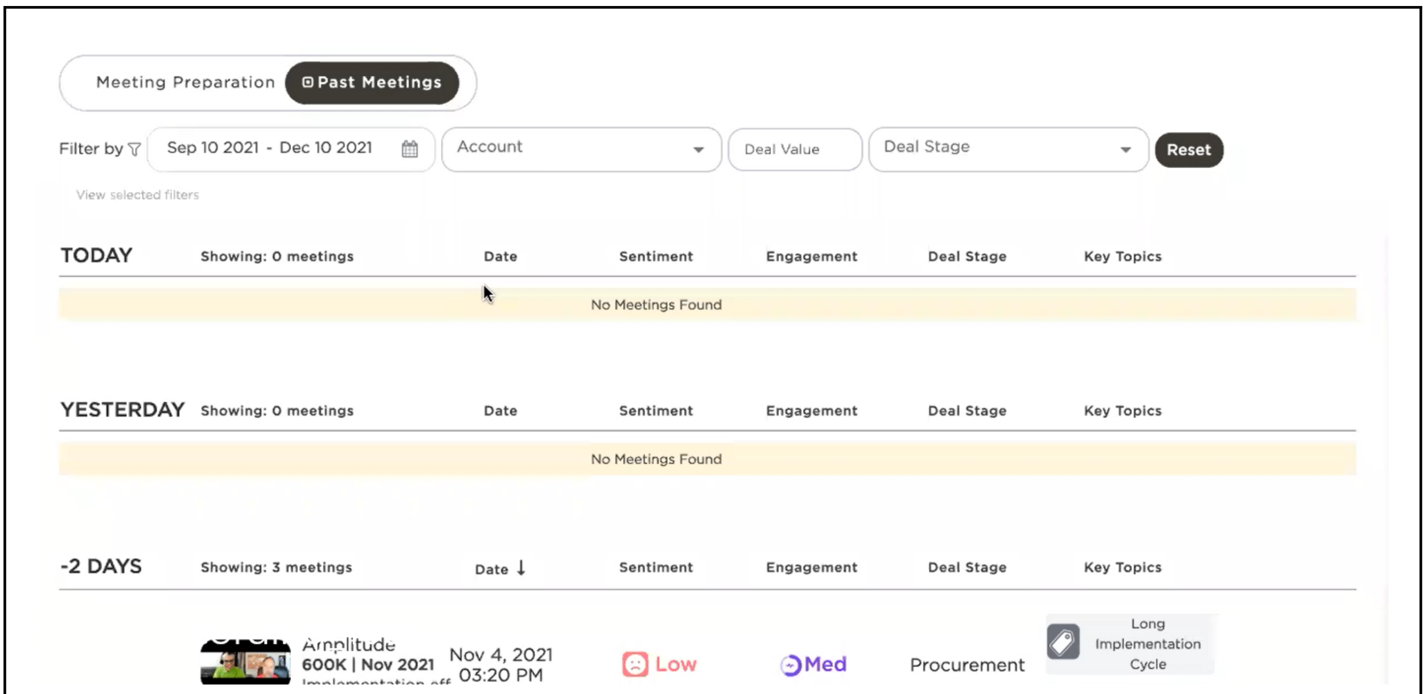



| | | |
|---|---|---|
| **1** | Date Panel | Date of meeting (day of week, date). |
| **2** | Time Panel | Time of meeting. |
| **3** | Meeting Info Panel | Shows meeting deal stage and the anticipated customer attendees. |
| **4** | Notes Panel | Meeting notes. |
| **5** | Deal Information | Displays the following information about the deal:<br>● Name<br>● Amount<br>● Creation date<br>● Upcoming meeting (links to meeting information page). |
| **6** | Sentiment Trend | The overall customer sentiment trend of this deal. |

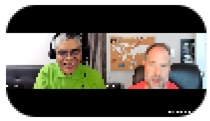
| | | |
|---|---|---|
| **7** | Review Last Meeting | Click the icon to review the last meeting under the same deal. The most recent meeting is listed under this deal. Click on it, and you will land on the meeting replay page. Key topics of interest from prior discussions and key suggestions for this deal. Two icons indicate last meeting sentiment and engagement. |
| **8** | Topics to Focus | Shows topics that need attention because they have been causing a downward trend for the deal. |
| **9** | Contacts to Restore | Key customer contacts that require the rep's attention. You can click on the contacts to check their detailed EQ status, described in the "[Contact insights](#)" section below. |
| | | |

## Past Meetings

Click on the "Past Meetings" tab on the meeting management landing page to see the complete list of all past meetings within your access. This provides a reverse chronological view of all meetings ever conducted. In addition, you can narrow the range of meetings with filters provided on the top.

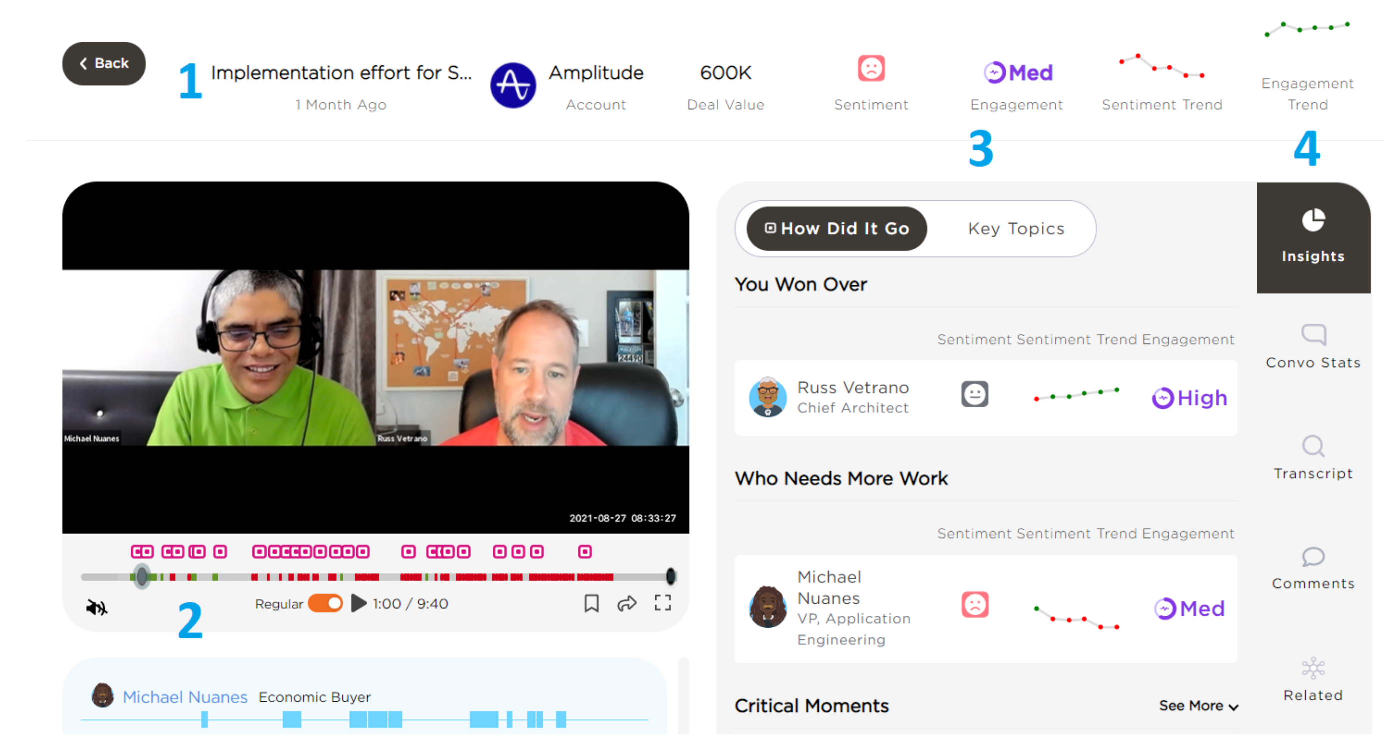



| | | |
|---|---|---|
| **1** | Filter by Date | Date filter. |
| **2** | Account | Customer account filter. Note: You can add more than one account. |
| **3** | Deal Value | Deal value range filter. |
| **4** | Deal Stage | Deal stage filter: Discovery, Qualification, Solution Demo, Value Case Established, Proposal & Procurement, Demo, Closed. The specific stage value set can vary from one customer to another. The ones used here are examples. |

| | | |
|---|---|---|
| **5** | Reset | Reset page to default and show all meetings. |
| **6** | Date from Today | |
| **7** | Showing | Meeting count for that day. Click a meeting icon to go to the [Meeting Replay]() page.  |
| **8** | Meeting Date | Sortable date of meetings. |
| **9** | Sentiment | Level of sentiment (Positive, Neutral, Negative). |
| **10** | Engagement | Level of engagement (Low, Medium, High). |
| **11** | Deal Stage | Deal stage. |
| **12** | Key Topics | Topics to pay attention to when dealing with customers. |

## Meeting Replay

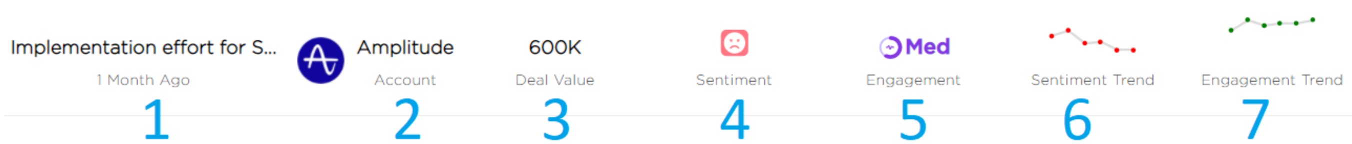
The meeting replay page allows reps to relive the key moments of a sales meeting.




| | | |
|---|---|---|
| **1** | Top Ribbon | Meeting Information. See [Top Ribbon - Meeting Information](). |
| **2** | Left Pane - Video | The left half of the page shows you the meeting video. You can control the replay with play/pause/volume. “Q for Sales” offers a state-of-art computer vision technology, and you can turn on the “under the hood” details by unchecking the default “regular” toggle. The participant panel below shows you the timeline of each participant’s speech track so that you can follow them individually. See [Left Pane – Video Area and Buttons](). |
| **3** | Middle Pane - Summary Information | Shows the system-generated meeting diagnosis, allowing reps to quickly review the most crucial moments of this meeting and learn from them. The default landing view is the summary level meeting Insights, including three sections:<br>• EQ outcome of the meeting. You can see which customer contacts you won over vs. needing more attention. It shows those customer participants' sentiment and engagement levels, allowing you to pinpoint the potential opportunities and risks.<br>• Critical moments. The system automatically ranks the top two most critical moments by their impact on the overall EQ outcome. You can click on "See More" to expand this section and show more critical moments.<br>• Next best action. It shows the key discussion topics to focus, to improve the overall customer EQ and the deal winning probability.<br>This pane is controlled by the five buttons in the right pane (see below). |
| **4** | Right Pane - Navigation | Choose these five buttons to show different summaries in the middle pane:<br>• [Insights]() (default): Two buttons: How Did it Go and Key Topics.<br>• [Convo Stats](): Shows the metrics of reps' conversational techniques, such as |

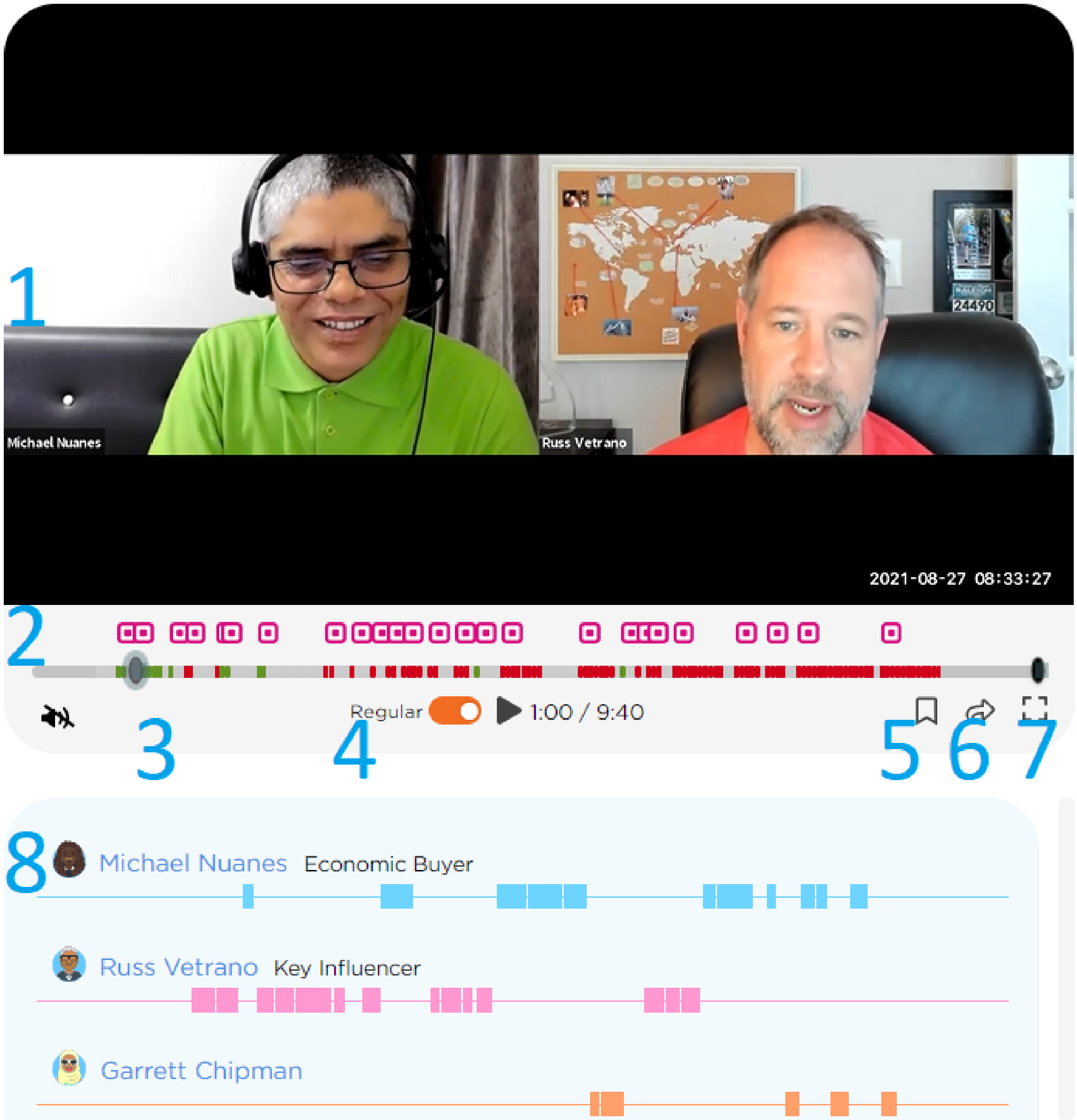
| | | |
|---|---|---|
| | | empathy level, talk ratio, politeness, talk speed, etc.<br>● Transcript: Shows transcript of the meeting.<br>● Comments: Allows reps to review the advice provided by their managers. Managers can comment on either the whole sales meeting or individual key moments.<br>● Related: Shows all the other meetings associated with the same deal<br>● Bookmarks: Shows manually tagged bookmarks on the meeting video. |

## Top Ribbon – Meeting Information

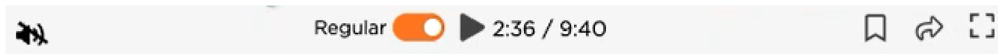
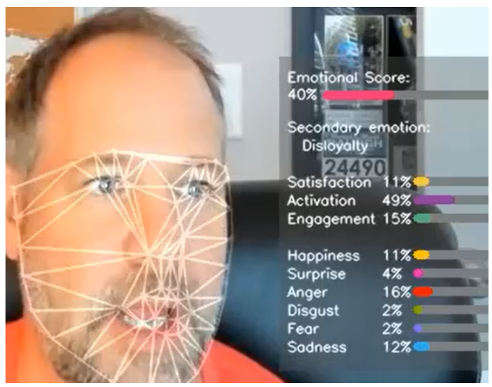
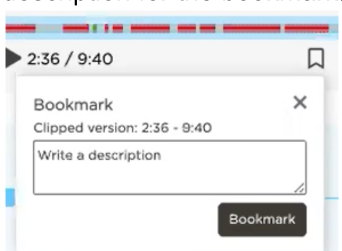
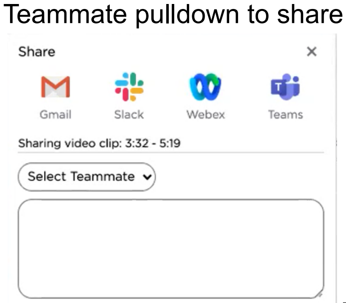


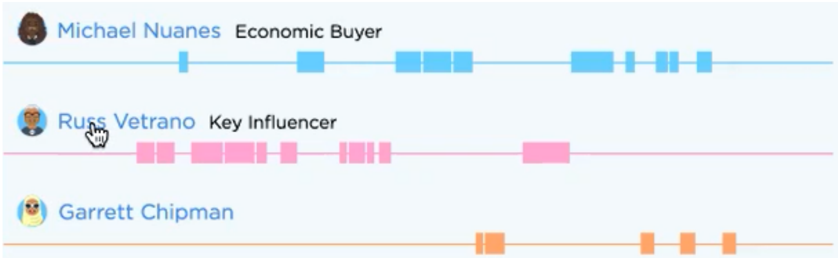

| | | |
|---|---|---|
| **1** | Meeting Name | Name of the meeting. |
| **2** | Account Name | Name of the account. |
| **3** | Deal Size | Size of the deal (e.g., dollars). |
| **4** | Sentiment | Average sentiment for this meeting. |
| **5** | Engagement | Average engagement for this meeting. |
| **6** | Sentiment Trend | Sentiment trend graph for this meeting. |
| **7** | Engagement Trend | Engagement trend for this meeting. |

## Left Pane – Video Area and Controls




| | | |
|---|---|---|
| **1** | Video Display | Video display area. |
| **2** | Key (Critical) Moments | Detects ‘Emotional Q’ (critical) moments of the meeting. These are significant moments that indicate either sentiment change or engagement change. They are displayed above the track as squares within squares. The main timeline track uses color codes:<br>• Red: indicates negative sentiment<br><br> |
| **3** | Video Track/Controls | Mute, Play, Regular, Full Screen, etc. |

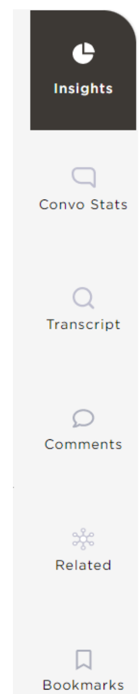
| | | |
|---|---|---|
| | |  |
| **4** | Regular | Toggles between regular view and Spider Web view, which shows the emotional analysis of the person.<br>● Emotional Score: ***<br>● Secondary Emotion: ***<br>● Satisfaction: ***<br>● Activation: ***<br>● Engagement: ***<br>● Happiness: ***<br>● Surprise: ***<br>● Anger: ***<br>● Disgust: ***<br>● Fear: ***<br>● Sadness: ***<br> |
| **5** | Bookmarks | Bookmark a location in the video. You can see all bookmarks by clicking on Bookmarks in the right panel. Use the left and right bookends on the playing track to define the beginning and endpoints of the bookmarked snippet. Then, use the textbox to add a description for the bookmark.<br> |
| **6** | Share | Share a meeting or snippet with a teammate (note that only Slack sharing is available in the current version of the product). Use the left and right bookends on the playing track to define the beginning and endpoints of the shared snippet. Then, use the Select Teammate pulldown to share with a team member.<br>. |
| **7** | Full-screen view. Click to enable. | |

| | | |
|---|---|---|
| **8** | Speech Participant Track   | |
| | ID | Participant name. |
| | Role | Participant role in the deal process. |
| | Participant Blocks | Shows track location when the participant is talking. Click a block to listen. |

## Right Pane – Navigation Information

Click the buttons in the right navigation to populate the middle panel with the following information.

- Insights - Provides a summary of meeting insights.
- Convo Stats - Tells how the sales team has been performing.
- Transcript - Provides searchable transcripts of a meeting.
- Comments - You can insert comments for the entire meeting or meeting snippets.
- Related - Shows all the other meetings associated with the same deal.
- Bookmarks - Shows bookmarks placed in the meeting video.

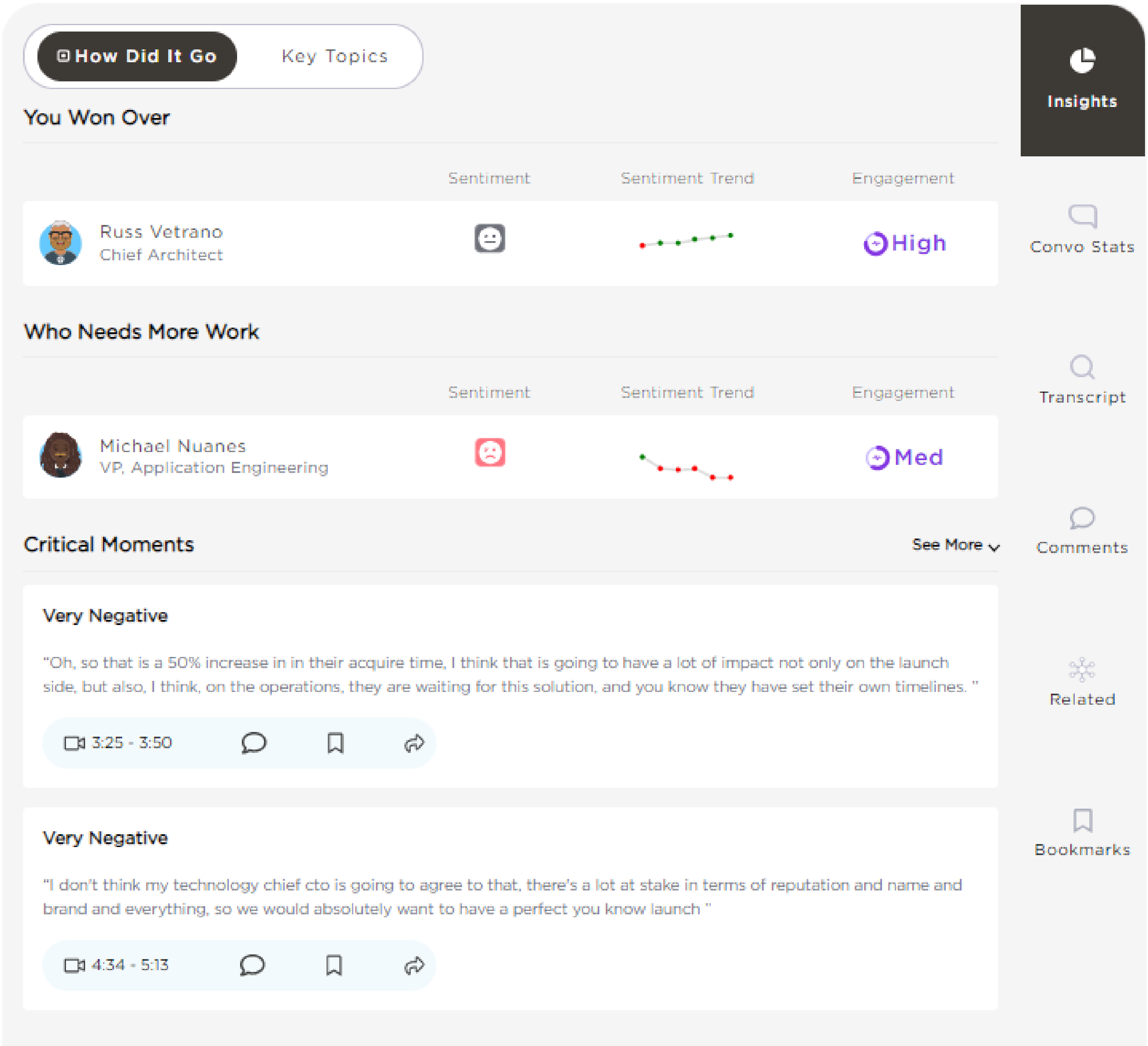



### Insights

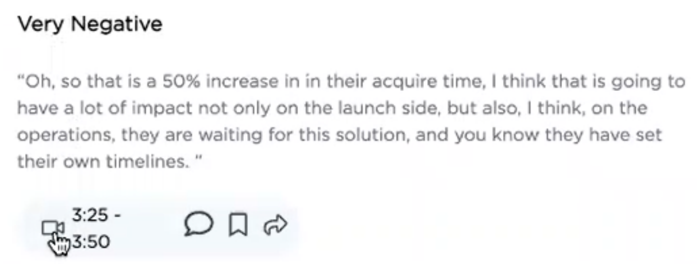
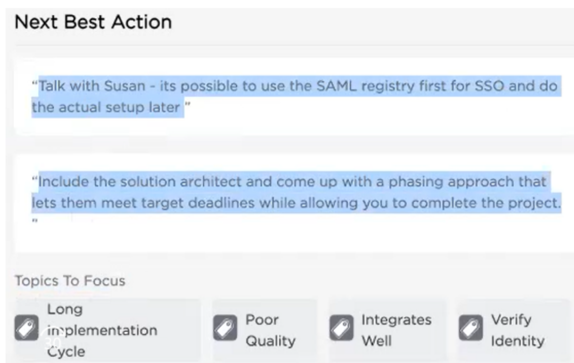
Insights provide summary information on meetings. There are two tabs for this page:

- How Did it Go
- Key Topics

## How Did it Go

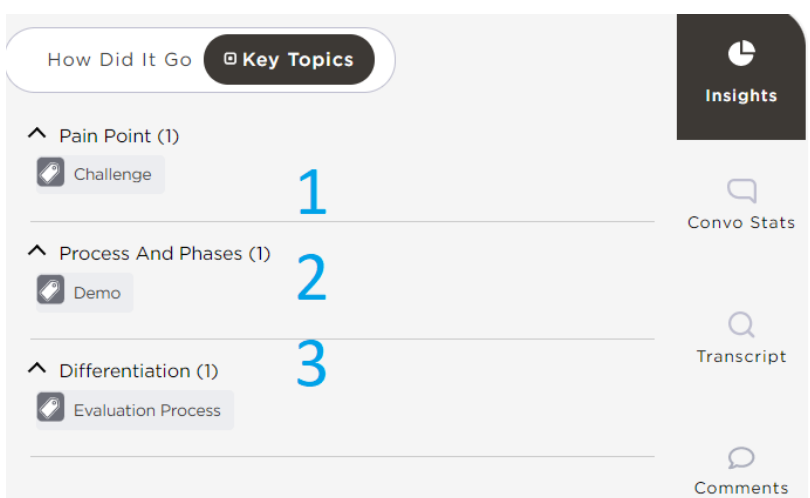


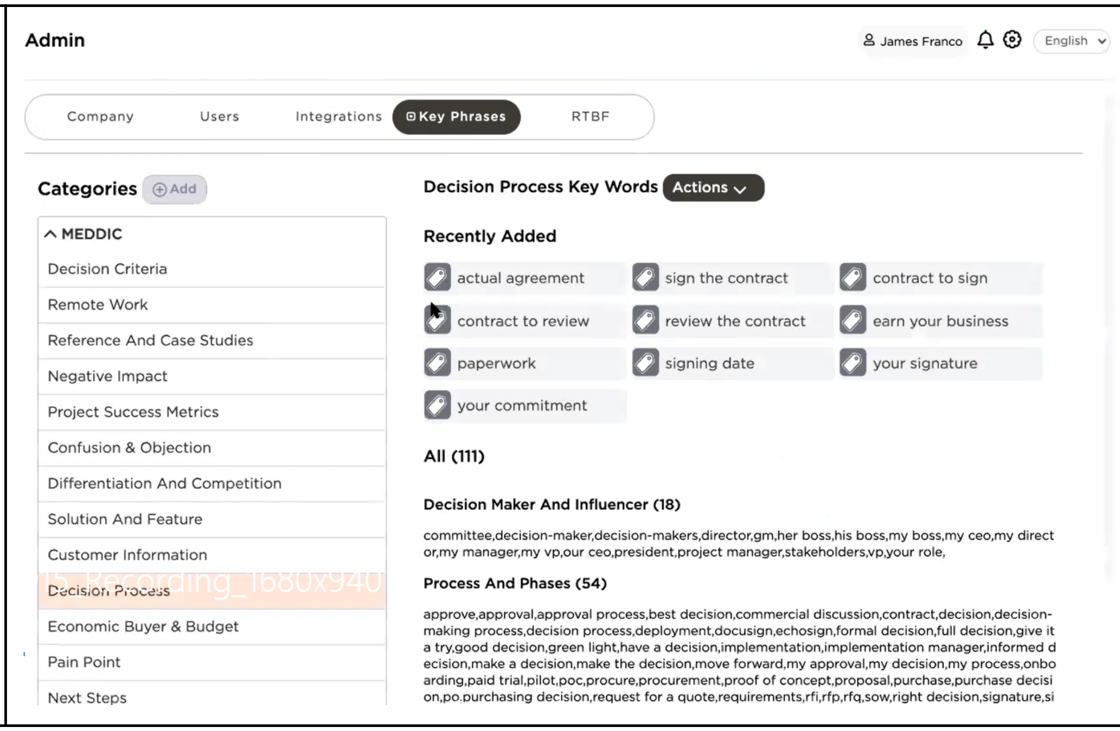

| | | |
|---|---|---|
| **1** | You Won Over | Displays participant(s) you have been successful with. Shows participant information, including their sentiment, sentiment trend, and engagement. |
| **2** | Who Needs Work | Displays participant(s) you have been unsuccessful with. Shows participant information, including their sentiment, sentiment trend, and engagement. |
| **3** | Critical Moments | Expand to see a ranked list of all the critical moments (most critical to least critical). Each moment corresponds to a square on the timeline. The tool shows a description of the moment, an excerpt, the length of the moment and has icons for comments, bookmarks, and sharing. You can share the entire meeting or individual key moments. You can also click on the video icon (e.g., "3:25 - 3:50") to play that snippet of the meeting video. |

<table>
<tr><td></td><td></td><td>
</td></tr>
<tr><td>4</td><td>Next Best Action</td><td>Shows two things:
<ul>
<li>Recommended action sentences: Comments entered by managers (entered by using Comments in the right pane).</li>
<li>Topics to Focus: Machine-detected discussion topics that might be important for the deal.</li>
</ul>

</td></tr>
</table>

## Key Topics

Key topics show you all the key discussion topics of this meeting, categorized based on the MEDDIC sales methodology and your business’s industry-specific terms.

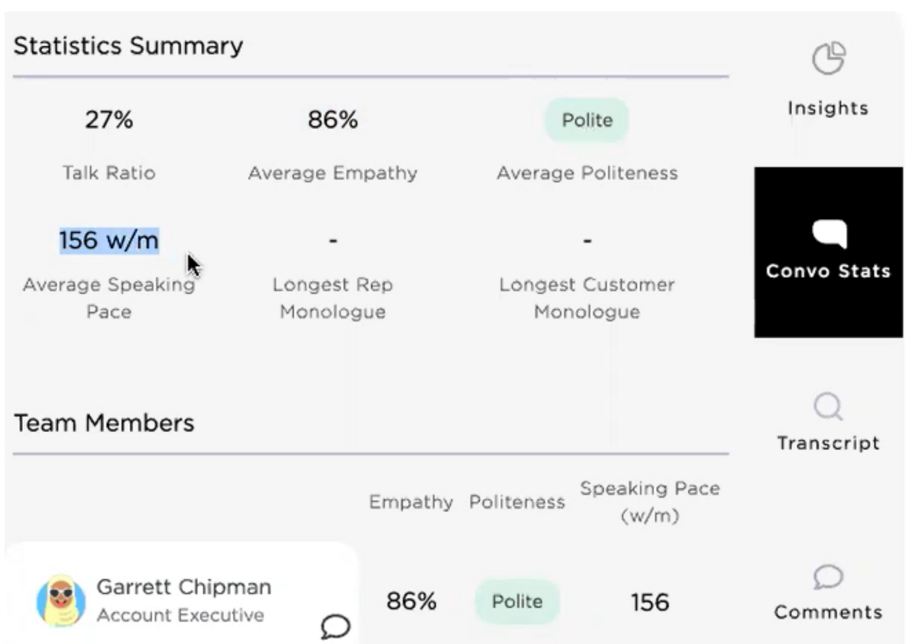
<table>
<tr><td colspan="3">
</td></tr>
<tr><td>1, 2, 3</td><td>Key Topics</td><td>Key Topic categories for this meeting. Your deal will have different topics based on how you set up your topics using “Key Phrases” in the Admin Page.</td></tr>
</table>

| | | |
|---|---|---|
| | |  |



## Convo Stats

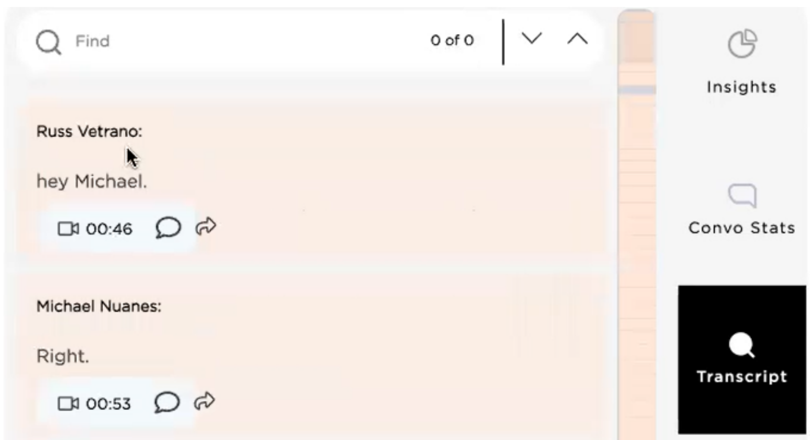
Conversational Stats provides information on how the sales team has been performing.

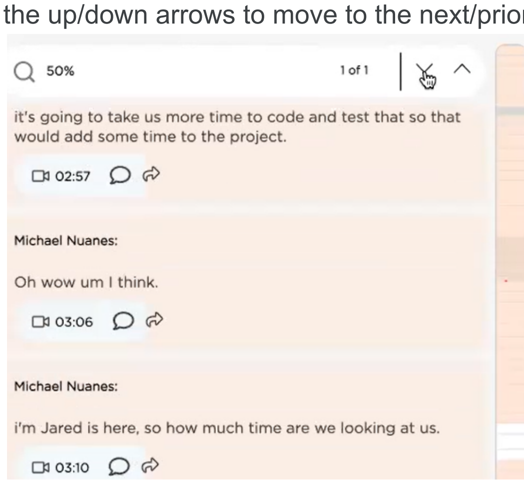
| | | |
|---|---|---|
|  | | |
| **1** | Statistics Summary | Shows average values of all sales reps for the following:<br>• Talk Ratio: Shows the percentage that the sales rep spoke during the meeting. It is an aggregated value across all sales reps attending this meeting.<br>• Average Empathy: Shows the average percentage of sales reps’ empathy toward the customer.<br>• Average Politeness: Shows average sales reps’ politeness to the customer (binary, not a percentage).<br>• Average Speaking Pace: Shows average talking speed of sales reps in words |

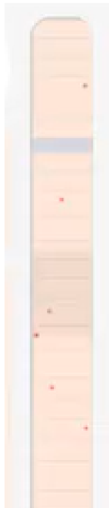
| | | |
|---|---|---|
| | | per minute.<br>● Longest Rep Monologue: Longest monologue of all sales reps.<br>● Longest Customer Monologue: Longest customer monologue. |
| **2** | Team Members | Shows individual values of each sales rep for the following:<br>● Empathy: Shows the sales rep’s empathy toward the customer as a percentage value.<br>● Politeness: Shows the sales rep’s politeness toward the customer as a percentage value.<br>● Speaking Pace: Show average talking speed of sales rep in words per minute. |

## Transcript

It shows the meeting transcript. Use the scroll bar on the right to navigate the transcript. The white color indicates a sales rep is talking. Salmon color indicates a customer is talking.

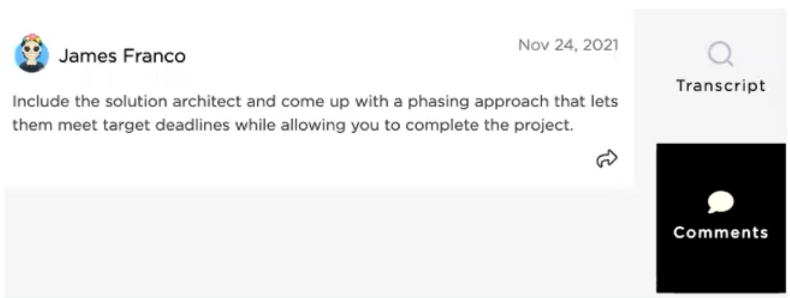
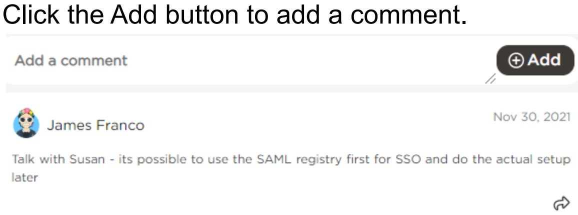



| | | |
|---|---|---|
| **1** | Find | Allows you to conduct a key word(s)-based search through the entire meeting transcript. Use the up/down arrows to move to the next/prior search instance in the transcript.<br><br> |
| **2** | Ribbon Dots | Indicates where all key moments occur based on your search. Click on a dot in the right ribbon to go to that place in the transcript. |

| | | |
|---|---|---|
| | |  |

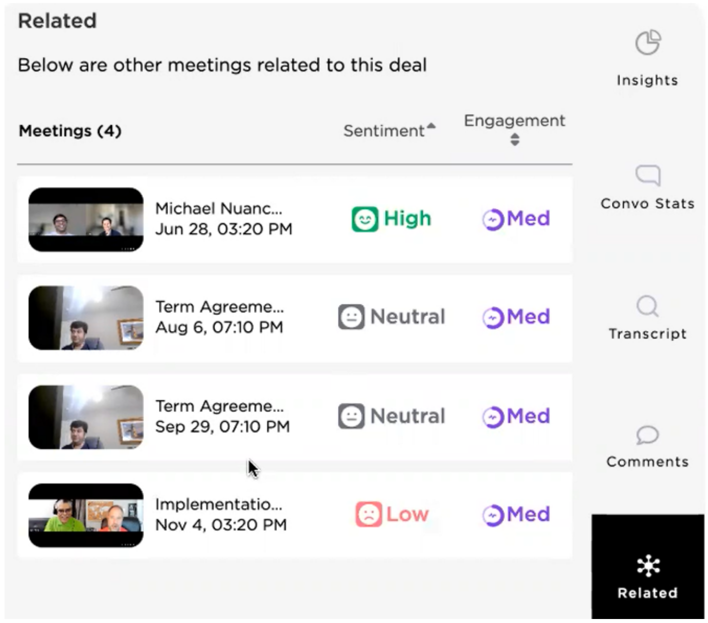
## Comments

Comments can be inserted for the entire meeting or for meeting snippets.

| | |
|---|---|
| |  |
| **1** | Click the Add button to add a comment.  |

## Related

It shows all the other meetings associated with the same deal.



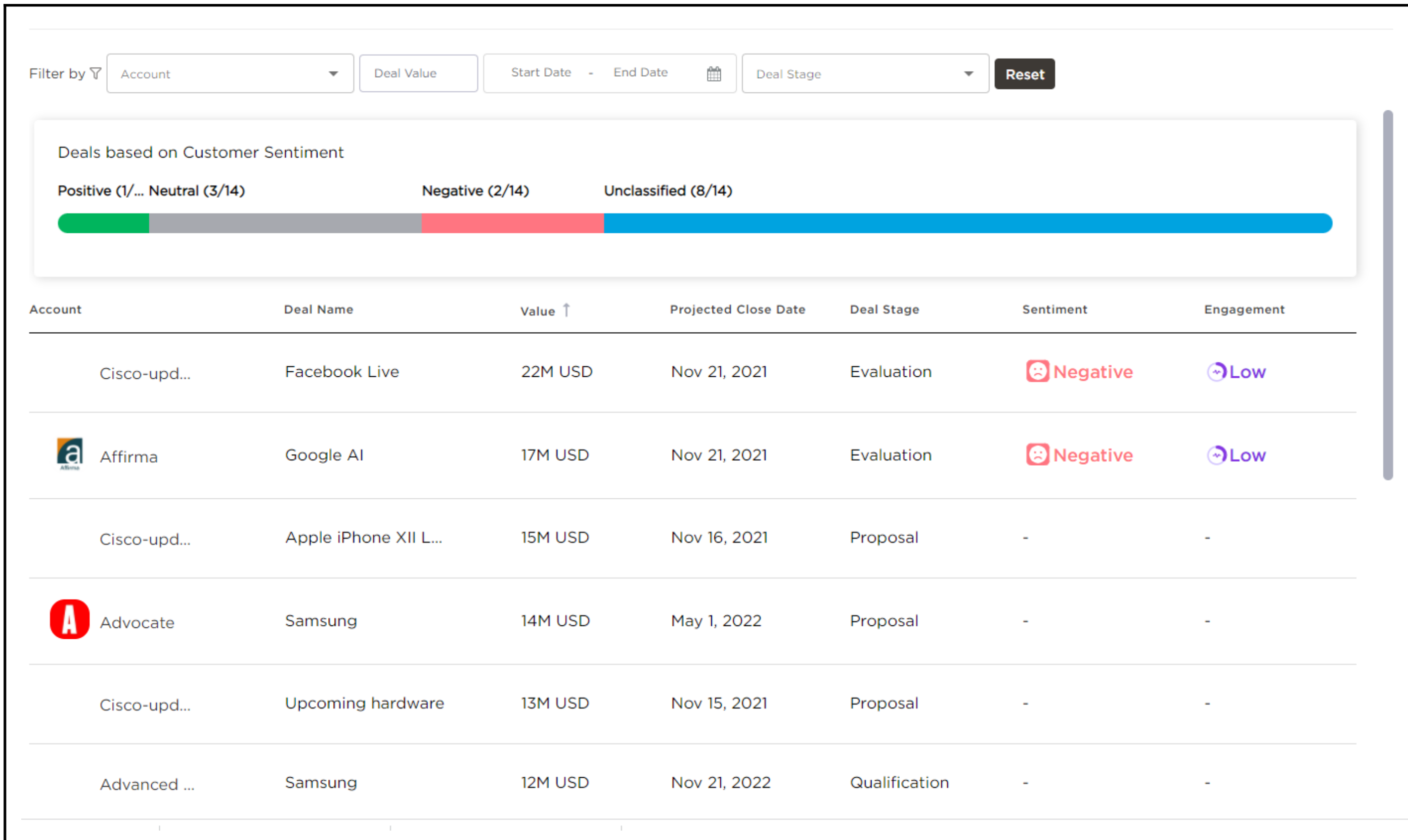

| | | |
|---|---|---|
| **1** | Meeting Icon | Click an icon to view that meeting video. Mouse over the icon to access the video controls (three vertical dots). |
| **2** | Meeting Details | Meeting contact and date information. |
| **3** | Sentiment | The average sentiment and engagement for the meeting are shown. Both are sortable. |
| **4** | Engagement | |

## Bookmarks

It shows bookmarks placed in the meeting video.

# Deals Page

Besides assisting sales reps in conducting effective meetings, “Q for Sales” also aggregates the meeting level EQ results and determines their collective impact on the sales deals. As a result, sales reps, managers, and revenue ops can understand the “EQ health” of important sales deals and improve their winning probabilities.




| | | |
|---|---|---|
| **1** | Filter Ribbon | Filter by account, deal value, date range, and deal stage. Click Reset to return to default values. |
| **2** | Deals Based on Customer Sentiment | Bar graph showing the number of deals by customer sentiment value:<br>• Positive<br>• Neutral<br>• Negative<br>• Unclassified |
| **3** | Deal List | Summary information with sortable columns for all deals:<br>• Account icon and name : Click to see the Individual Deal View.<br>• Deal Name<br>• Value (sortable)<br>• Projected Close Date<br>• Deal Stage<br>• Sentiment (color coded)<br>• Engagement (color coded) |

## Individual Deal View

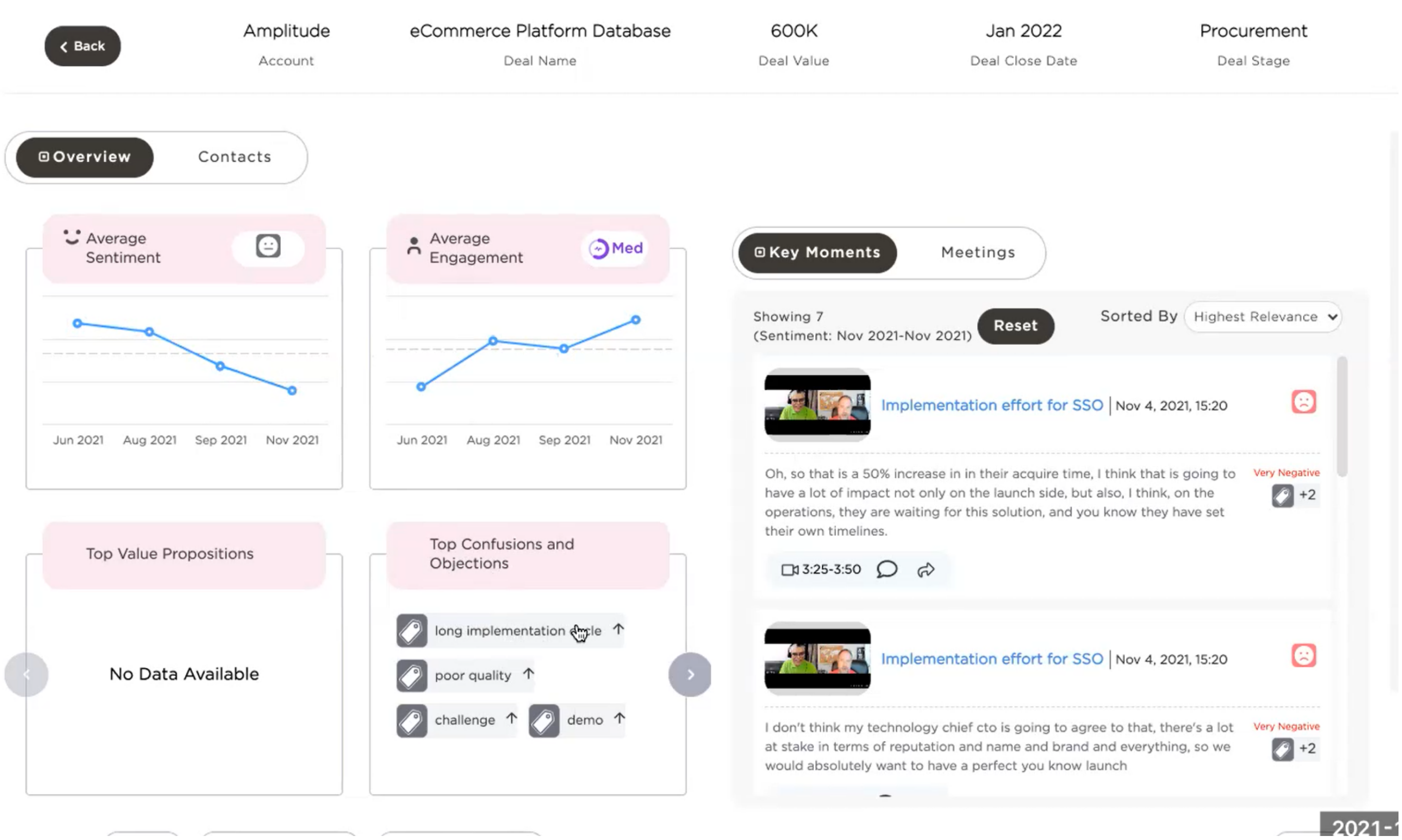
The individual deal view shows the deal’s EQ and customer communication details, so sales reps and managers can study the overall EQ status of the deal, identifying risks and opportunities to improve its winning probability. There are two tabs:

- Deal Overview (default)
- Deal Contacts

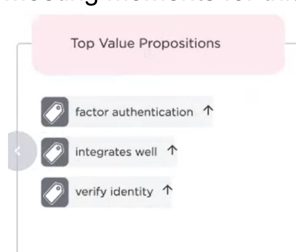
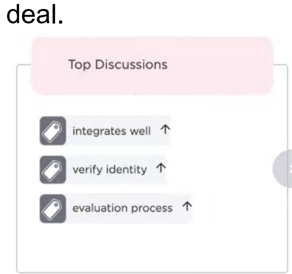
### Deal Overview

The deal overview page shows EQ trending information during the deal lifecycle and lets you study the causes for upswings and downswings in the EQ of the deal using key moments.

With a few clicks, sales reps and managers can effectively inspect the deal EQ status, identify the potential risks and opportunities, pinpoint the associated discussion topics, and quickly relive meeting moments to gain accurate knowledge. They can then take those insights to mitigate risks and improve their deal winning probability.



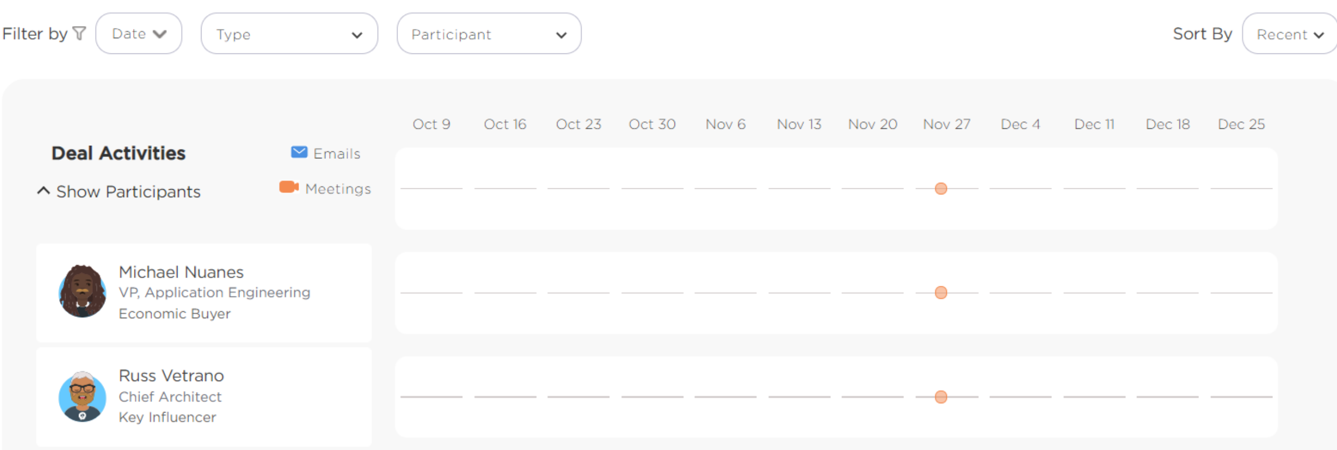

| | | |
|---|---|---|
| **1** | Top Ribbon | Shows Account Name, Deal Name, Deal Value, Deal Close Date, and Deal Stage. |

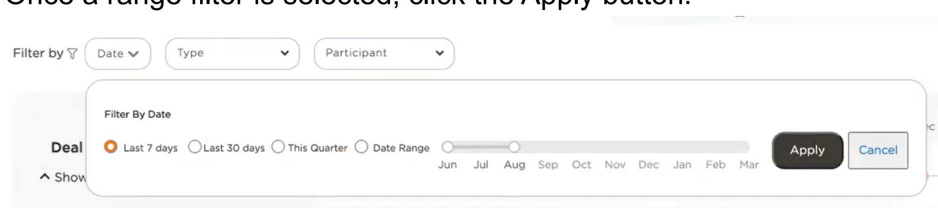
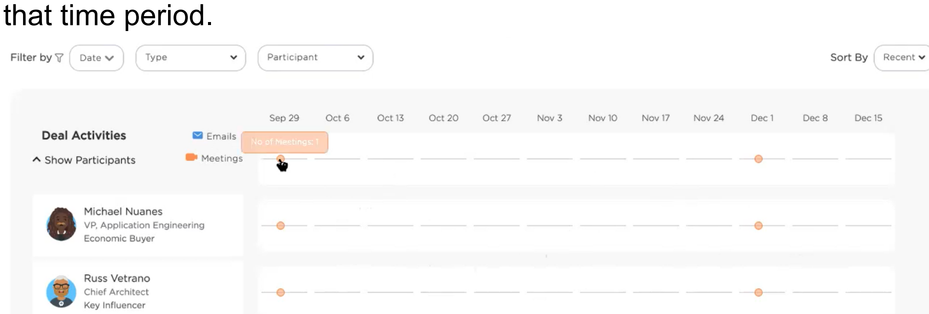
<table>
<tr><td>2</td><td>Average Sentiment</td><td rowspan="2">Using these interactive graphs, you can review this deal’s sentiment and engagement trends over the past four months. These trends indicate the overall EQ health condition. A downward trending sentiment/engagement is a warning signal to the sales rep and calls for corrective actions.<br><br>“Q for Sales” not only reports the news but also tells you their leading causes. Click on one of the dots on the trend graph, and the main content of this page gets refreshed to show the leading causes of that EQ result. This example tells you that the leading causes of negative customer sentiment and objections are the long implementation cycle and the perceived poor quality of your product.<br><br>Click on the graph to refresh and show more details in Top Value Propositions and Top Confusions and Objections panes. Click on those indicators, and the right panel shows you the most relevant meeting moments that contain those discussion topics. You can review the discussion of those meeting moments or replay the associated “meeting snippets.”</td></tr>
<tr><td>3</td><td>Average Engagement</td></tr>
<tr><td>4</td><td>Top Value Propositions</td><td>Shows the values proposed to the customer, which the customer agrees upon (positive reactions). Click any topic to refresh the right pane. The Uniphore backend logic will automatically retrieve key meeting moments for this deal.<br>
</td></tr>
<tr><td>5</td><td>Top Confusions and Objections</td><td>Shows topics that generate customer controversy (negative reactions). Click any topic to refresh the right pane. The Uniphore backend logic will automatically retrieve key meeting moments for this deal.<br>
</td></tr>
<tr><td>6</td><td>Top Discussions</td><td>Shows general discussions you had with the customer (neutral reactions). Click any topic to refresh the right pane. The Uniphore backend logic will automatically retrieve key meeting moments for this deal.<br>
</td></tr>
</table>

| | | |
|---|---|---|
| **6** | Key Moments tab | The default tab shows key moments based on your selections in the left panel. |
| **7** | Meetings tab | Shows meeting information related to your selections in the left panel. |
| **8** | Sorted By pulldown | Use to sort key meeting moments (for example, by highest relevance). |

## Deal Activities

Below the Deal Overview section, you can review the sales activity history of this deal, including emails and sales meetings. Sales reps and managers can understand which key customer contacts have participated in the conversation and identify who should be more engaged to keep the deal flowing. Click on one of those activities, and it shows summary information.



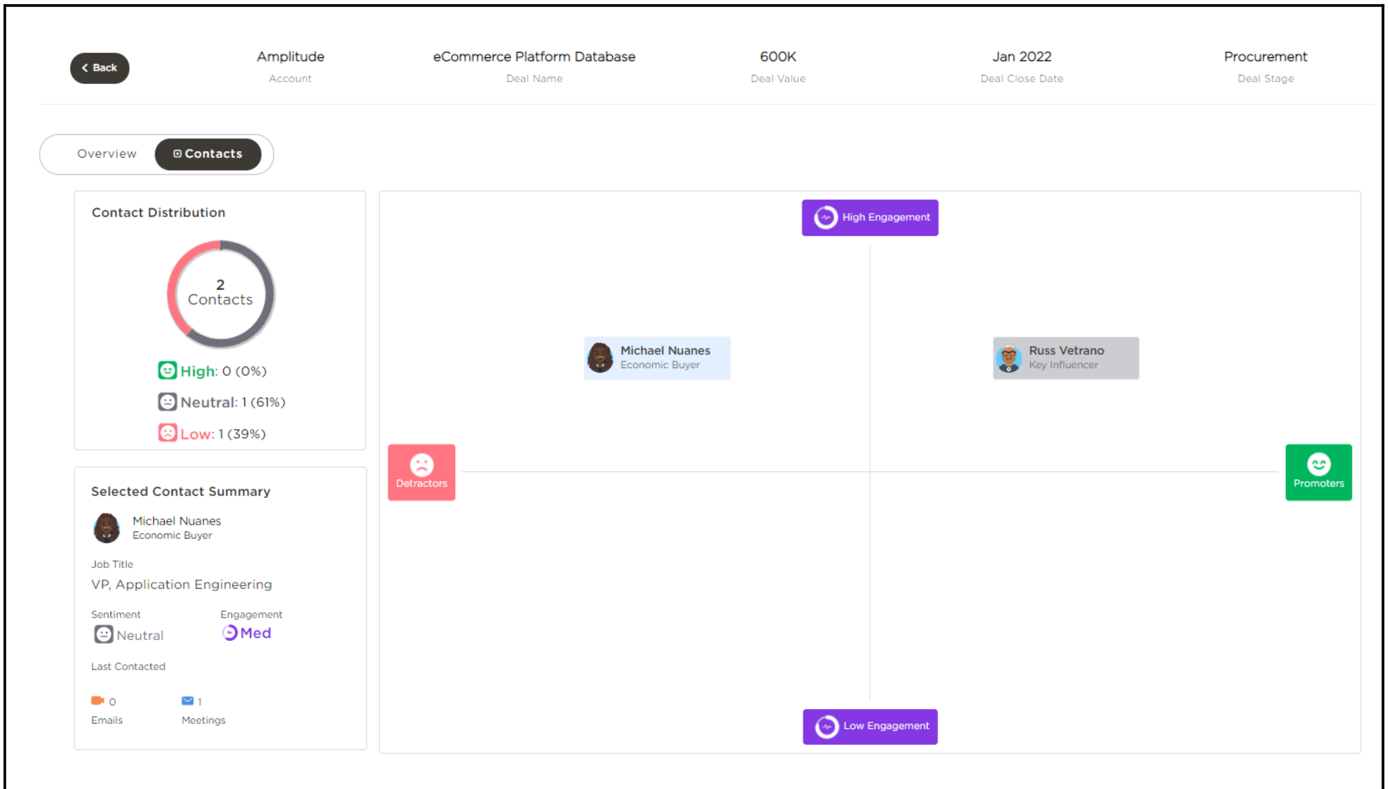

| | | |
|---|---|---|
| **1** | Filter by Date | By default, you will see the past three months as the date range on the timeline. You can use the radio buttons to filter by Last 7 days, Last 30 days, or This Quarter. Use the slider to select a custom Date Range. Once a range filter is selected, click the Apply button.   |
| **2** | Filter by Type | Selections are Video Conferencing or Email. Emails are shown as blue bubbles on the timeline, while Meetings (Video Conferencing) are shown as pink bubbles. If you click on Email, you will see the thread of emails for those dates. Click on Meetings to show all meetings during that time period.   |
| **3** | Filter by Participant | Select a participant using this pulldown. Note that not all participants will be shown since different people are involved at different stages of the deal negotiation. |

| | | |
|---|---|---|
| **4** | Sort by | Use to sort display results. |

## Deal Contacts Tab

“Q for Sales” allows sales reps to conduct their sales communications through a human-centric approach. The centerpiece of this approach is the deep understanding of individual customer contacts' roles and their emotional status. Under the “Contacts” tab of a sales deal, you can study key contacts' emotional status (by sentiment and engagement) and their influence on the deal closure as an EQ distribution graph. As a result, you can identify critical contacts in a negative EQ status and require immediate attention.

Contacts are shown in a 2x2 matrix format where the vertical dimension shows the engagement level, and the horizontal dimension shows the sentiment level. In the following screen, high engagement participants are in the top section, while low engagement participants are in the lower section. Likewise, for sentiment, detractors are in the left section, and promoters are in the right section.




| | | |
|---|---|---|
| 1 | Top Ribbon | Shows Account Name, Deal Name, Deal Value, Deal Close Date, and Deal Stage |
| 2 | Contact Distribution | Shows the percentage of customer contacts whose EQ levels are high, neutral, and low. |
| 3 | High Engagement section | Shows customer contacts who are highly engaged. |
| 4 | Low Sentiment section | Shows customer contacts who have low sentiment. |
| 5 | High Sentiment section | Shows customer contacts who have high sentiment. |
| 6 | Low Engagement section | Shows customers who are poorly engaged. |
| 7 | Selected Contact Summary | Summary information for contact selected in the right panel: Name, Job Title, Sentiment, Engagement, Last Contacted date, Emails count, and |

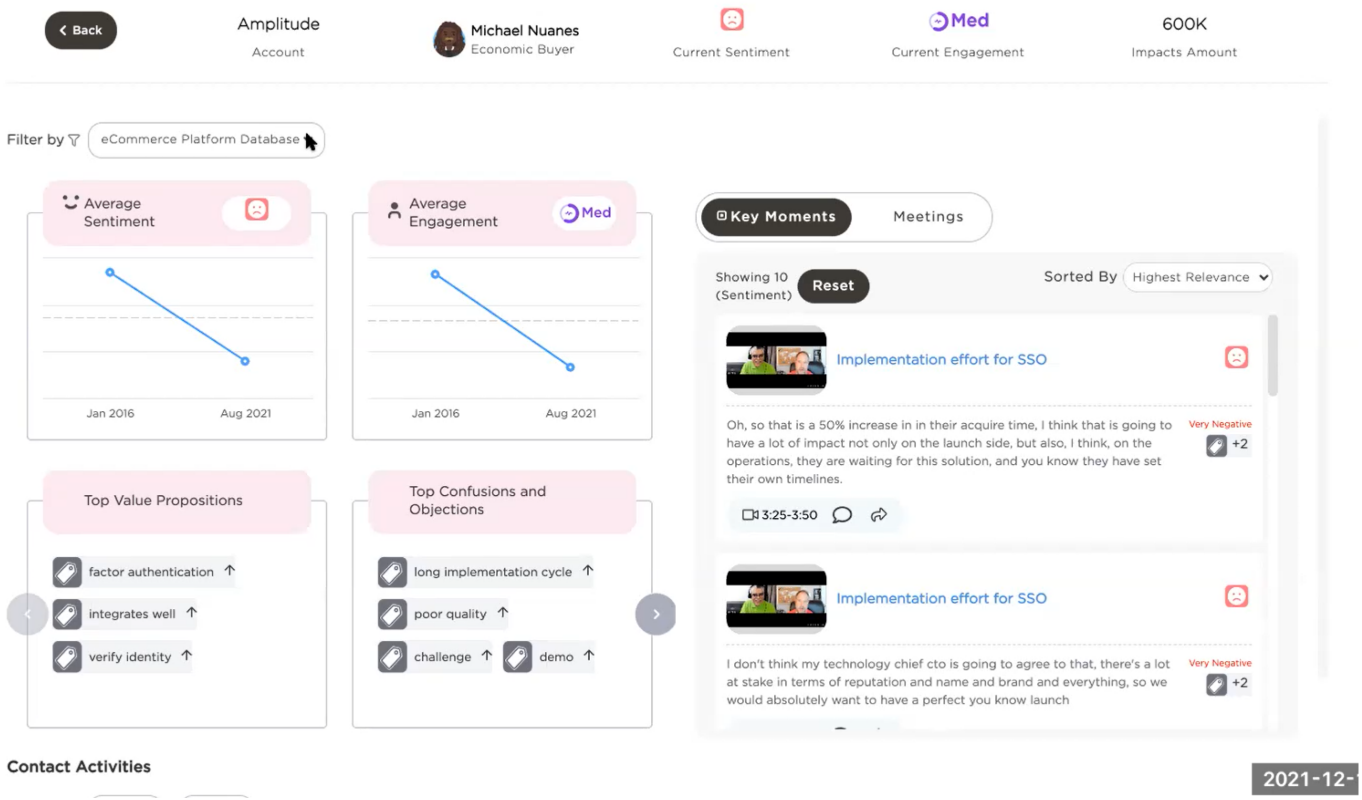
| | | |
|---|---|---|
| | | Meetings count. Click a person’s name to go to the [Contact Detail Page](#). |

## Contact Detail Page

You can reach the individual contact detail page from:

- Clicking on the contact under “You won over” or “You need to work” section of the meeting replay
- Clicking on the participant name on the deal’s activity history timeline

The layout of this page is almost identical to the Deal details page. The difference is that the contact can be involved in more than one deal. You can check the EQ status of this specific customer contact through the selected period. In addition, you can filter the data set by the specific deal this contact participated in.




| | | |
|---|---|---|
| **1** | Top Ribbon | Shows Account Name, Deal Name, Deal Value, Deal Close Date, and Deal Stage |
| **2** | Filter by | Allows you to see all the deals in which this person has been involved. |
| **3** | Average Sentiment | Shows the person’s average sentiment trend over the time period for all deals (default is 4 months). Click on the graph to refresh the bottom and right panels. |
| **4** | Average Engagement | Shows the person’s average engagement trend over the period for all deals (default is 4 months). Click on the graph to refresh the bottom and right panels. |
| **5** | Key topics | Like the deal detail page, we show you the discussion topics associated with the sentiment/engagement trend. They are categorized into “Top value propositions,” “Top confusions and objections,” and “Top discussions.” |

| | | |
|---|---|---|
| **6** | Contact Activities | Allows you to filter by date and type of deal. |
| **7** | Key moments | Shows the key meeting moments associated with the topic you selected on the left. |

# Teams Page

Note: The Teams Page is only available to managers.

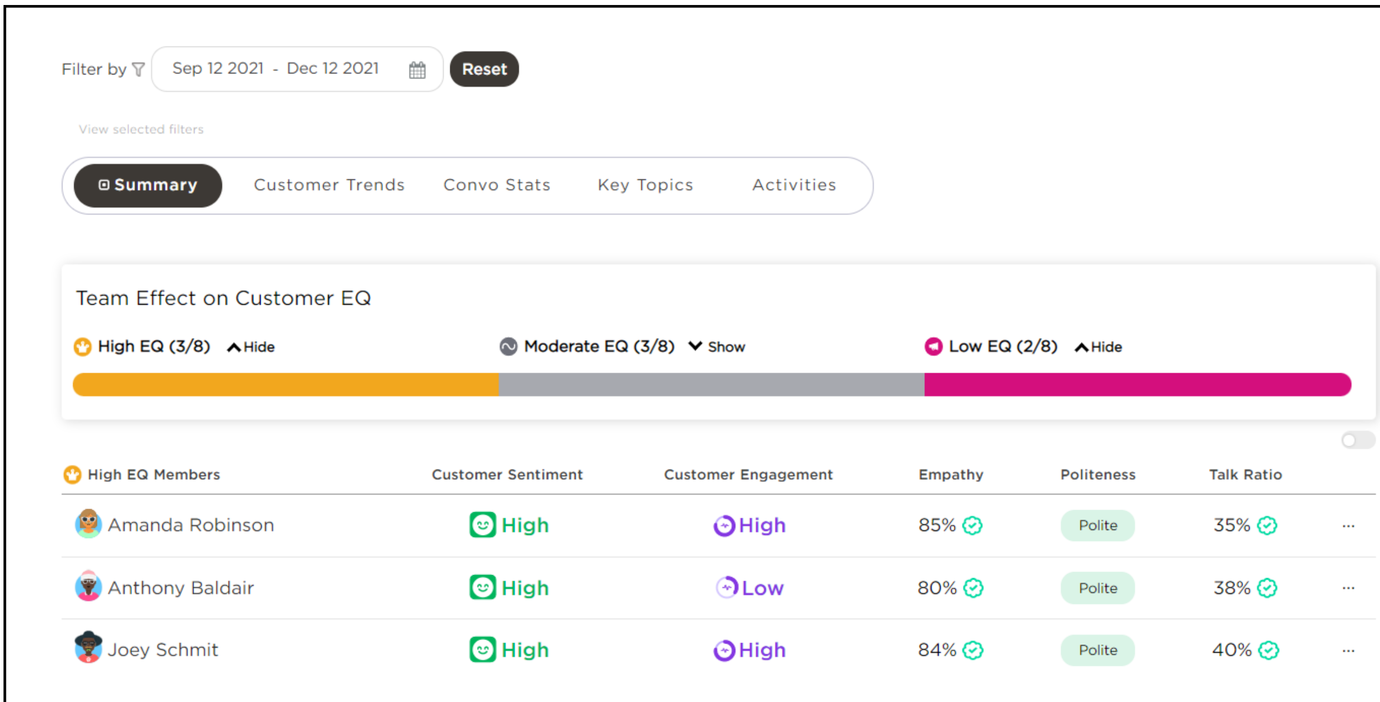
The Teams Page allows sales managers to monitor and manage employee performance and guide them with best practices. Managers get a summary view of their team members' customer engagement effort, organized by the customer EQ outcome (customer sentiment). Along with the sentiment value, they can also gain insights on the customer engagement level and the reps' conversational metrics. Sales managers can inspect the team KPIs over the past weeks, along with the contribution from individual sales reps in a leaderboard format. In addition, the manager can directly leave coaching comments.

From the Teams Page, click a tab to navigate to:

- Summary (default): Each team member’s EQ result is shown in a table format.
- Customer Trends: Shows the trend of customer sentiment and engagement.
- Convo Stats: Shows the trend of reps’ conversational metrics.
- Key Topics: Shows the discussion topics being covered during the sales meetings.
- Activities: Shows the sales activity metrics (number of emails, number of sales meetings, etc.).

## Summary

This Summary tab shows each team member’s EQ in table format.



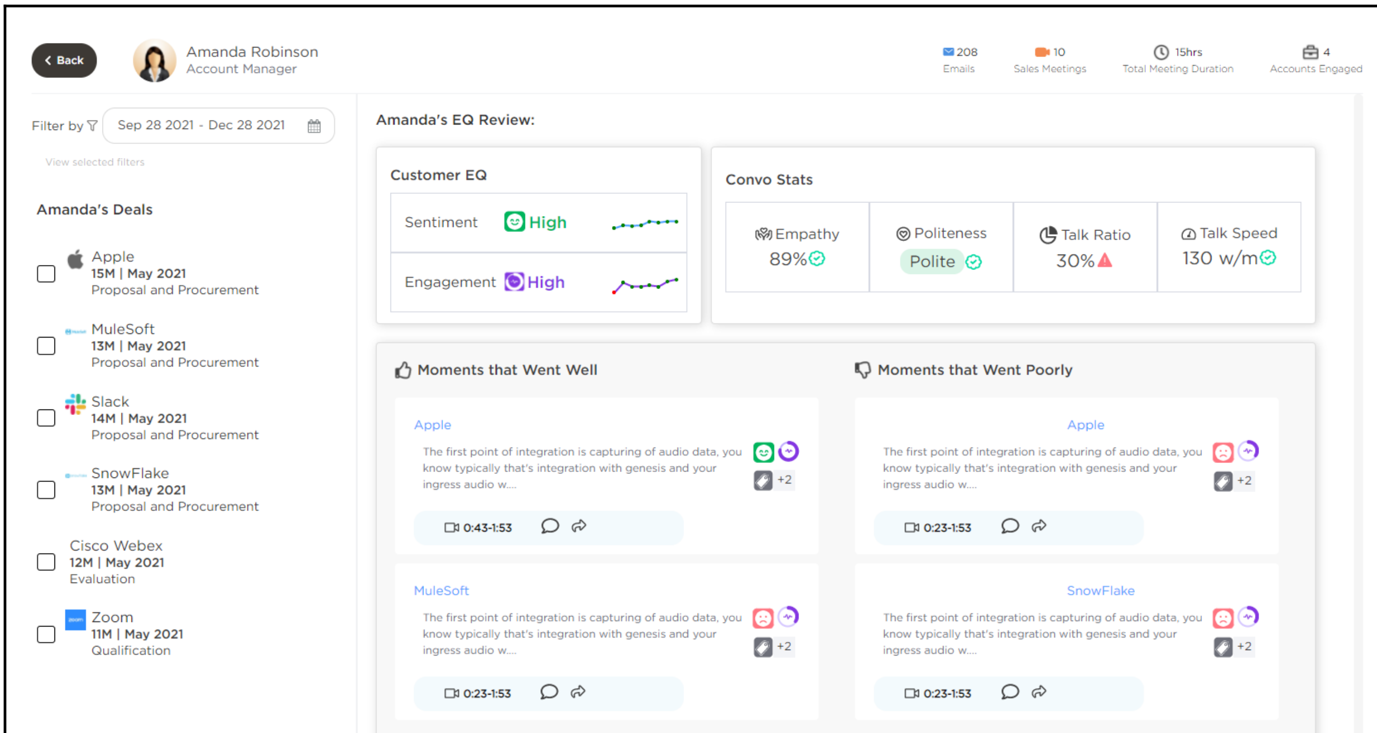

| | | |
|---|---|---|
| **1** | Filter by | Filter over a date range. Reset will return to default settings. |
| **2** | Team Effect on Customer EQ: Color Bar | Shows EQ level for all members as High, Moderate, or Low. Use Show/Hide to show or hide the EQ level in the table. |
| **3** | Team Effect on Customer EQ: Table | Shows EQ of reps, grouped in sections from High to Low and ranked within the sections (highest to lowest). Values are shown for a rep’s:<br>• Sentiment (Positive-Neutral-Negative)<br>• Engagement (High-Medium-Low) |

| | | |
|---|---|---|
| | | • Empathy<br>• Politeness<br>• Talk Ratio<br><br>You can also sort the result of this table by those column headers. |
| **4** | Team Effect on Customer EQ: Comments | Managers can add comments by clicking the three dots (…) at the end of the row. Comments show up on the Improve page under Observations. |
| **5** | Individual Icon | Click a rep’s icon to go to a page that shows a manager’s view of the rep’s performance. See [Manager View of Rep Performance](#manager-view-of-rep-performance). |

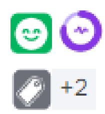
## Manager View of Rep Performance

Note: This page is only available to managers.

This page is used to review an individual sales rep’s performance.

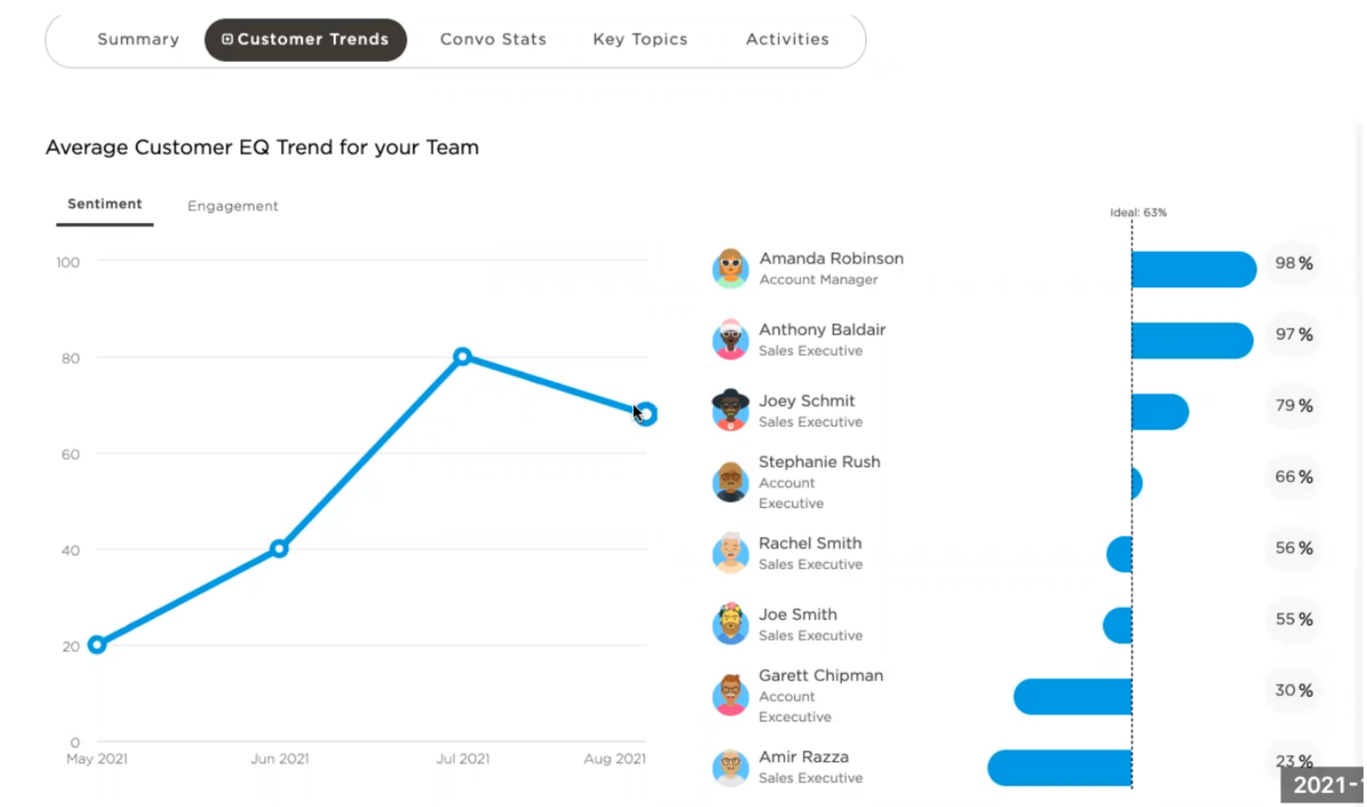


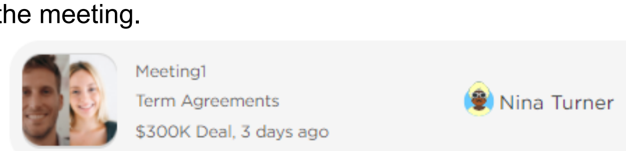

| | | |
|---|---|---|
| **1** | Filter by | Filter the sales activities (the base of this performance analysis) over a date range. |
| **2** | Activities | Shows activities the rep conducted: emails, number of meetings, total meeting duration, and number of accounts engaged. Click an icon for additional information. |
| **3** | Deals | Shows all of a rep’s active deals in chronological order. Click a deal checkbox to populate the right panes with information related to that deal. You can select more than one deal. Unselect all deals to show all deal information in the right panes. |
| **4** | Review | Shows the following information over the selected period:<br>• Customer EQ: Shows EQ sentiment and engagement values and trend graphs. Icons are color-coded to match the levels (e.g., a green smiley face - high, red |

| | | |
|---|---|---|
| | | frowny face - low).<br>● Convo Stats: Shows conversational statistics for empathy, politeness, talk ratio, and talk speed. These values are compared with the corresponding ideal value ranges. Warnings are displayed as red triangles. Acceptable values are shown as green checkmarks. |
| **5** | Moments | Displays summary information for:<br><br>● Moments that Went Well (typically high sentiment and engagement values)<br>● Moments that Went Poorly (typically low sentiment and engagement values)<br><br>Each column shows information about the key moments of the selected deals. If no deal is selected, the columns display moments for all deals. This includes text information about the moment, date, icons, and key topics.<br><br>EQ Icons:<br>The top two icons show EQ associated with key topics for sentiment and engagement, respectively.<br><br>The bottom icon shows the key topics being discussed within this meeting. The number indicates the number of topics. Click the icon to see the topic information.<br><br>For video, comments, and share:<br>● Click the video icon to replay the video.<br>● Use the dialog balloon to add your comments.<br>● Use the Share icon to share via Slack<br> |

## Customer Trends

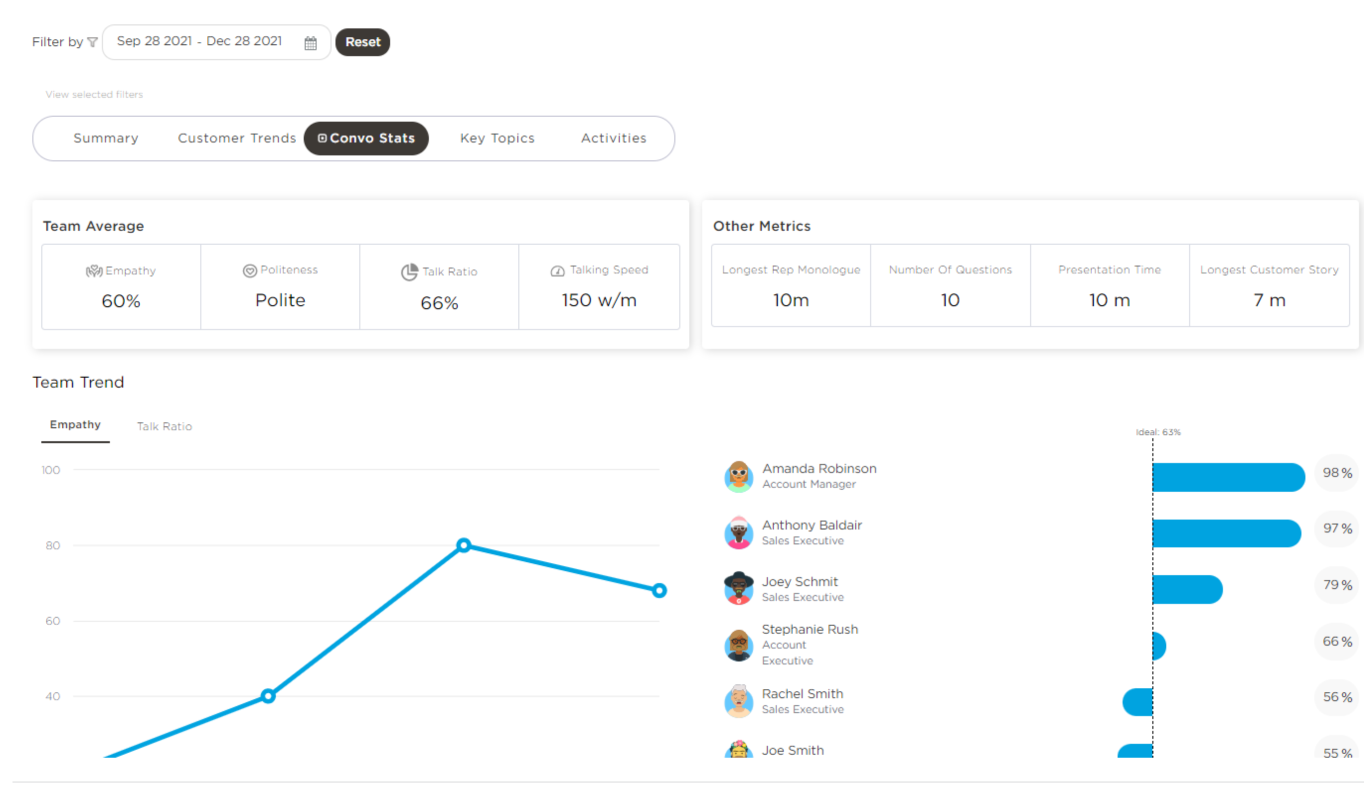
The Customer Trends tab shows the trend of customer sentiment and engagement.




| | | |
|---|---|---|
| **1** | Average EQ Trend Graph | The graph shows the average value of either Sentiment (default) or Engagement trend across the entire team for the past four months. Click Engagement to see the engagement graph. |
| **2** | Leaderboard | Employee icon, name, and title, ranked from high to low. |
| **3** | Bar graph | Shows ideal Sentiment/Engagement value (%) and each employee’s individual Sentiment/Engagement performance score in relation to the ideal value. The ideal value is calculated based on all the deals closed-won by the team in the selected period. (sentiment and engagement are calculated separately).<br><br>Mouse over the blue bars to see a View Meetings popup which allows you to view all the meetings information for this employee. The meeting information shows the meeting name, value, and contact. Click the meeting icon to view the meeting.<br> |

## Convo Stats

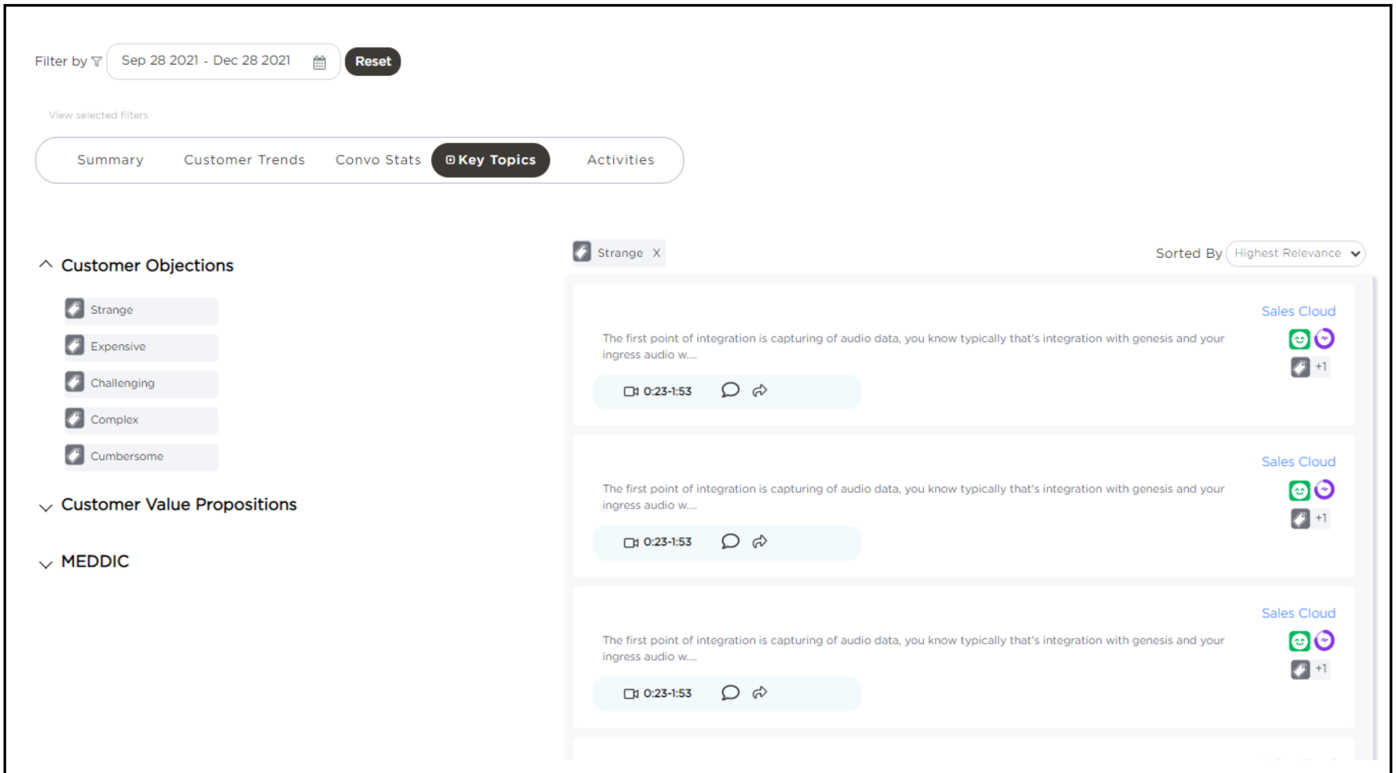
The Convo Stats tab shows the trend of conversational metrics.

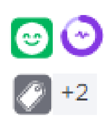


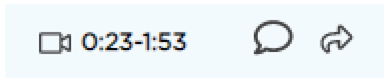

| | | |
|---|---|---|
| **1** | Filter by | Filter over a date range. Reset will return to default settings. |
| **2** | Team Average | Shows team averages for:<br>● Empathy: Percentage of sales reps’ empathy toward the customer.<br>● Politeness: Average of sales reps’ politeness toward the customer.<br>● Talk Ratio: Percentage of sales reps speaking during the meeting.<br>● Talking Speed: Talking speed of sales reps in words per minute. |
| **3** | Other Metrics | Shows team metrics for:<br>● Longest Rep Monologue: Longest monologue of all sales reps without customer response. Anything over two minutes is considered poor sales practice.<br>● ~~Number of Questions: *** not for this release ***~~<br>● ~~Presentation Time: *** not for this release ***~~<br>● Longest Customer Story: Longest customer monologue without rep interruption. |
| **4** | Team Trend Graph | Shows team trend graphs and data for Empathy and Talk Ratio. |
| **5** | Leaderboard | Employee icon, name, and title, ranked from high to low. |

## Key Topics

The Key Topics tab shows you the discussion topics organized by the MEDDIC sales methodologies.

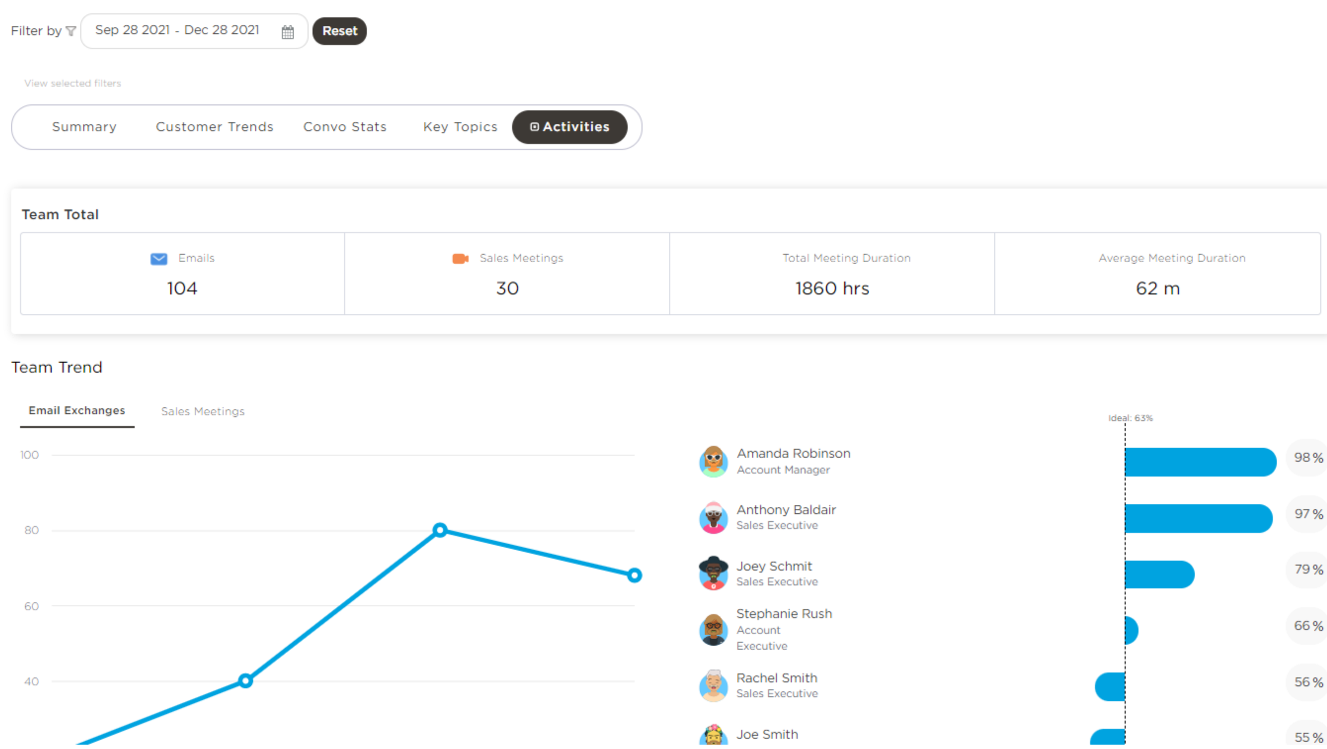



| | | |
|---|---|---|
| **1** | Filter by | Filter over a date range. Reset will return to default settings. |
| **2** | Customer Objections | Customer objections are listed by categories. Click a category to populate the right pane. |
| **3** | Customer Value Propositions | The value proposition section shows all discussions that generate positive customer reactions regarding your product and services. |
| **4** | MEDDIC | The MEDDIC section shows all discussions organized by MEDDIC key phrase categories, being defined out of the box as a part of your system configuration. |
| **5** | Information Pane | Shows the meeting moments associated with the selections made in the left pane. Use Sorted by to sort topics by relevance and chronological order.<br><br>EQ Icons:<br>The top two icons show EQ associated with key topics for sentiment and engagement, respectively.<br><br>The bottom icon shows the key topics being discussed within this meeting. The number indicates the number of topics. Click the icon to see the topic information.<br><br>For video, comments, and share:<br>● Click the video icon to replay the video.<br>● Use the dialog balloon to add your comments.<br>● Use the Share icon to share via Slack |

| | | |
|---|---|---|
| | |   |

## Activities

The Activities tab shows the sales activity metrics for team members (number of emails, number of sales meetings, etc.).



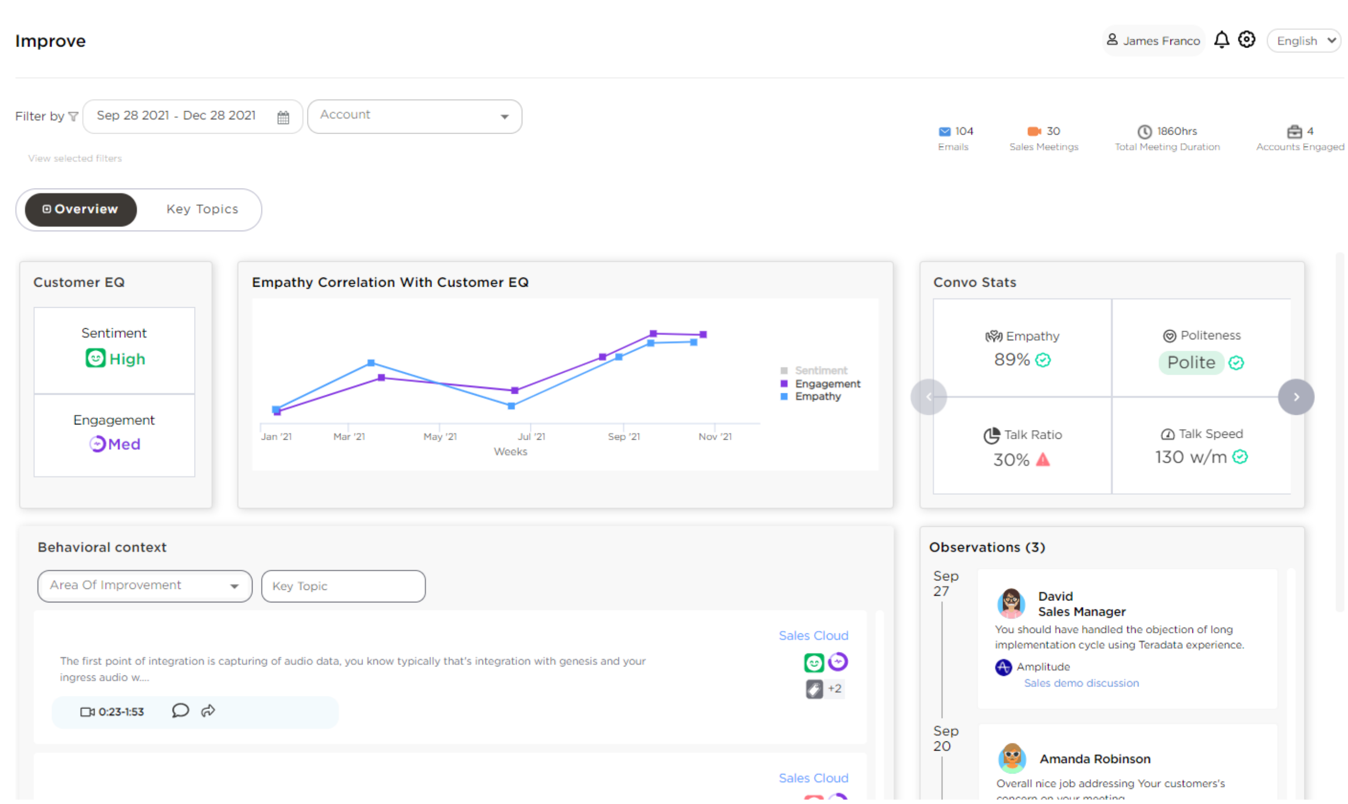

| | | |
|---|---|---|
| **1** | Filter by | Filter over a date range. Reset will return to default settings. |
| **2** | Team Total | Shows data for:<br>• Emails: Number of emails during the period.<br>• Sales Meetings: Number of sales meetings during the period.<br>• Total Meeting Duration: Sum of all meeting duration during the period.<br>• Average Meeting Duration: Average meeting duration during the period. |
| **3** | Team Trend | Shows trending graphs and bar charts for:<br>• Email exchanges: Number of emails.<br>• Sales Meetings: Number of sales meetings. |
| **4** | Leaderboard | Team members (icon, name, and title) are ranked from high to low for both email exchanges and sales meetings. The team average is shown as a vertical line.<br><br>• Click a team member’s icon to see their individual page.<br>• Click a rep’s blue bar to see more information about their meetings related to emails and sales meetings. |

# Improve Page

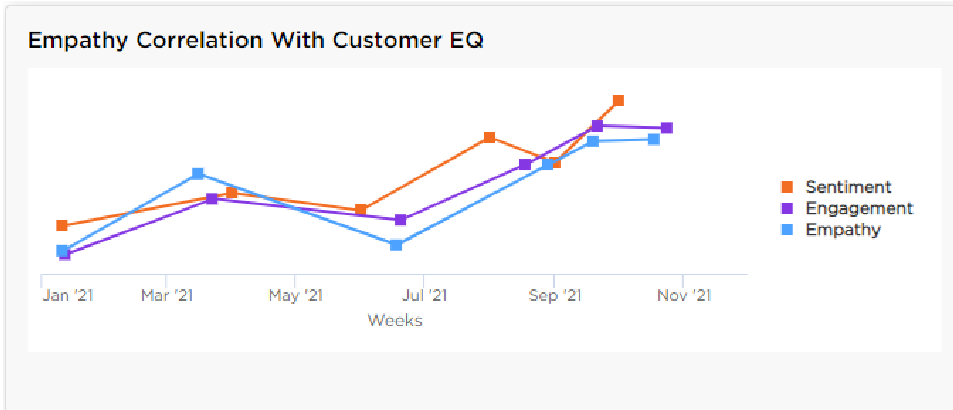
The Improve Page is used by sales reps to do self-coaching and monitoring of sales techniques to understand how well they have been performing in meetings. By encouraging self-coaching, sales reps can improve their sales techniques based on real-life examples. There are two tabs for this page:

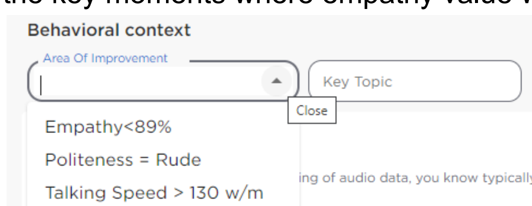
- Overview (default)
- Key Topics

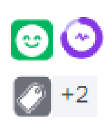
## Overview



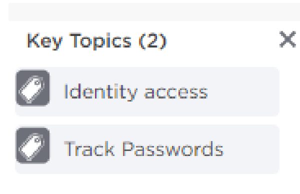

| | | |
|---|---|---|
| **1** | Filter Selections | Filter and analyze meetings by date and account. |
| **2** | Activities | Shows emails, number of meetings, total meeting duration, and number of accounts engaged. Click an icon for additional information. |
| **3** | Customer EQ | Shows average customer EQ for sentiment and engagement. |
| **4** | Empathy Correlation with Customer EQ | Shows Customer EQ trending and correlation of customer empathy with customer sentiment and customer engagement.<br>• Mouse over the graph icons to see more information (date, metrics).<br>• Click the buttons in the legend to turn on/off the respective graphs. |

<table>
<tr>
<td></td>
<td></td>
<td>


</td>
</tr>
<tr>
<td>5</td>
<td>Convo Stats</td>
<td>Shows rep’s averages for Empathy, Politeness, Talk Ratio, and Talk Speed.
<ul>
<li>A green checkmark indicates values are within the ideal range.</li>
<li>A red triangle warning sign indicates values are outside the ideal range.</li>
</ul>
*** Click on one of the convo stats to refresh the Key Moments” section below to show top moments of the sales meetings that need improvement in this conversational technique. For example, if your talk ratio is 50% (deviating from the ideal 40%), we will show you those meetings with excessive rep talking time.</td>
</tr>
<tr>
<td>6</td>
<td>Behavioral Content</td>
<td>Shows important key moments within meetings conducted in the date range. Use the Area of Improvement and Key Topic search to filter information.<br><br>
Area of Improvement<br>
Filter by a pulldown list of improvements. For example, you can show all the key moments where empathy value was below 89%.<br>


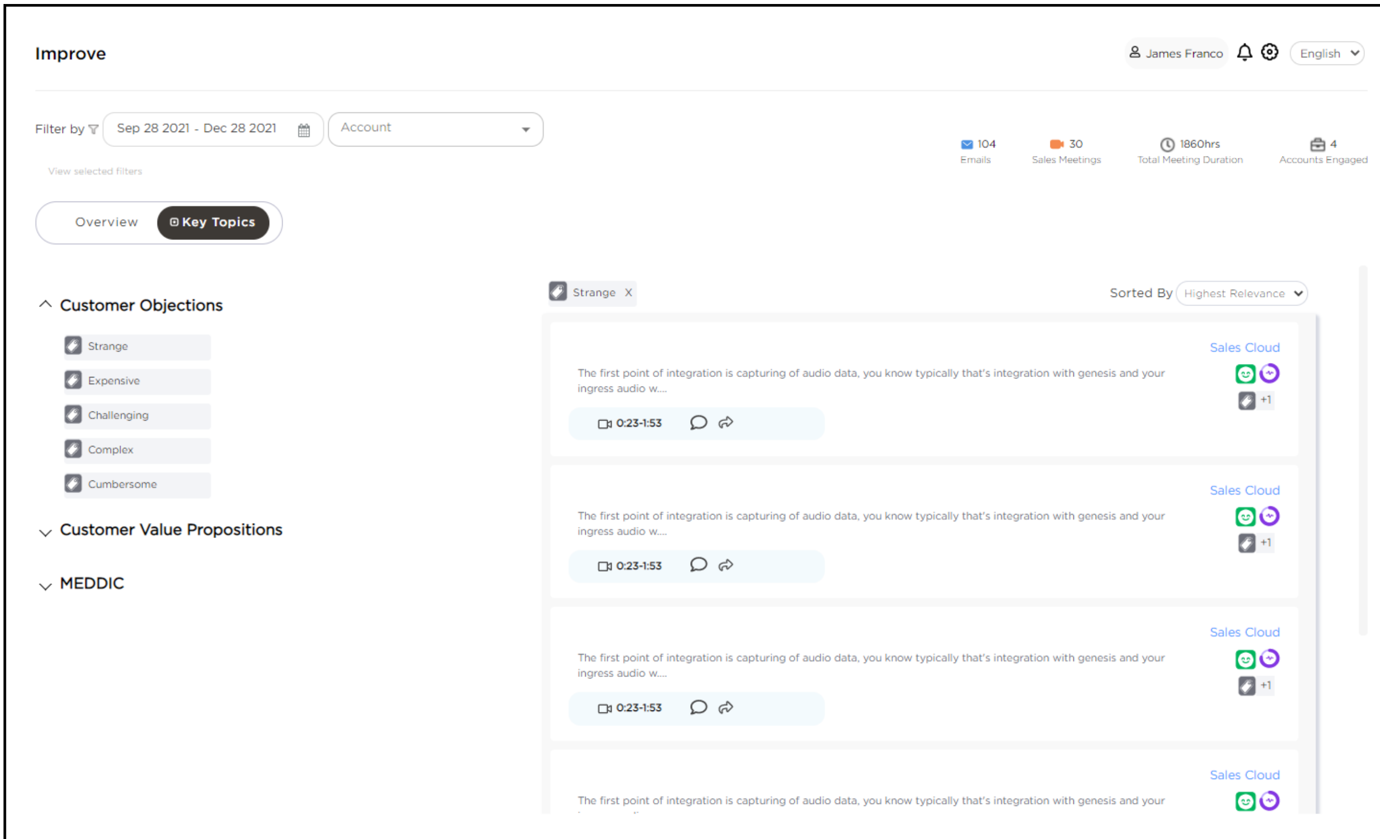
Key Topics<br>
Enter text in the Key Topic field to filter on words or phrases.<br><br>
Icons<br>
The top two icons show sentiment and engagement, respectively.<br>


The bottom icon shows key topics being discussed within this meeting. The number indicates the number of topics. Click the icon to see the topic information.</td>
</tr>
</table>

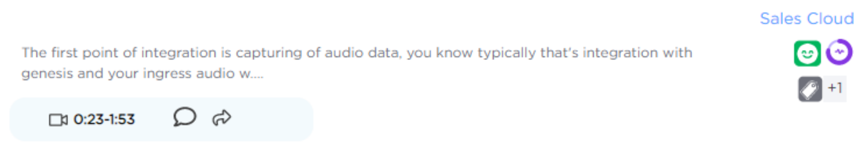
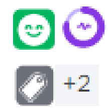
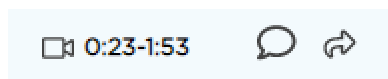
| | | |
|---|---|---|
| | |   |
| **7** | Observations | Shows supervisor/manager observations and suggestions through performance-related comments. Date, deal, and meeting information are also shown as well as a link to the meeting. |

## Key Topics

*** tbd




| | | |
|---|---|---|
| **1** | Filter Selections | Filter and analyze meetings by date and account. |
| **2** | Activities | Shows emails, number of meetings, total meeting duration, and number of accounts were engaged. |
| **3** | Customer Objections | Click an objection to show the key moments for that objection in the right pane. |
| **4** | Key Topics | Shows information about the key moments of the meeting: text describing the moment, date, icons, and key topics. Use Sorted by to sort topics by relevance and chronological order. |

| | | |
|---|---|---|
| | | <br>EQ Icons:<br>The top two icons show EQ associated with key topics for sentiment and engagement, respectively.<br><br>The bottom icon shows the key topics being discussed within this meeting. The number indicates the number of topics. Click the icon to see the topic information.<br><br>For video, comments, and share:<br>● Click the video icon to replay the video.<br>● Use the dialog balloon to add your comments.<br>● Use the Share icon to share via Slack<br> |
| **5** | Customer Value Propositions | |
| **6** | MEDDIC | Shows the discussion topics organized by the MEDDIC sales methodologies. |

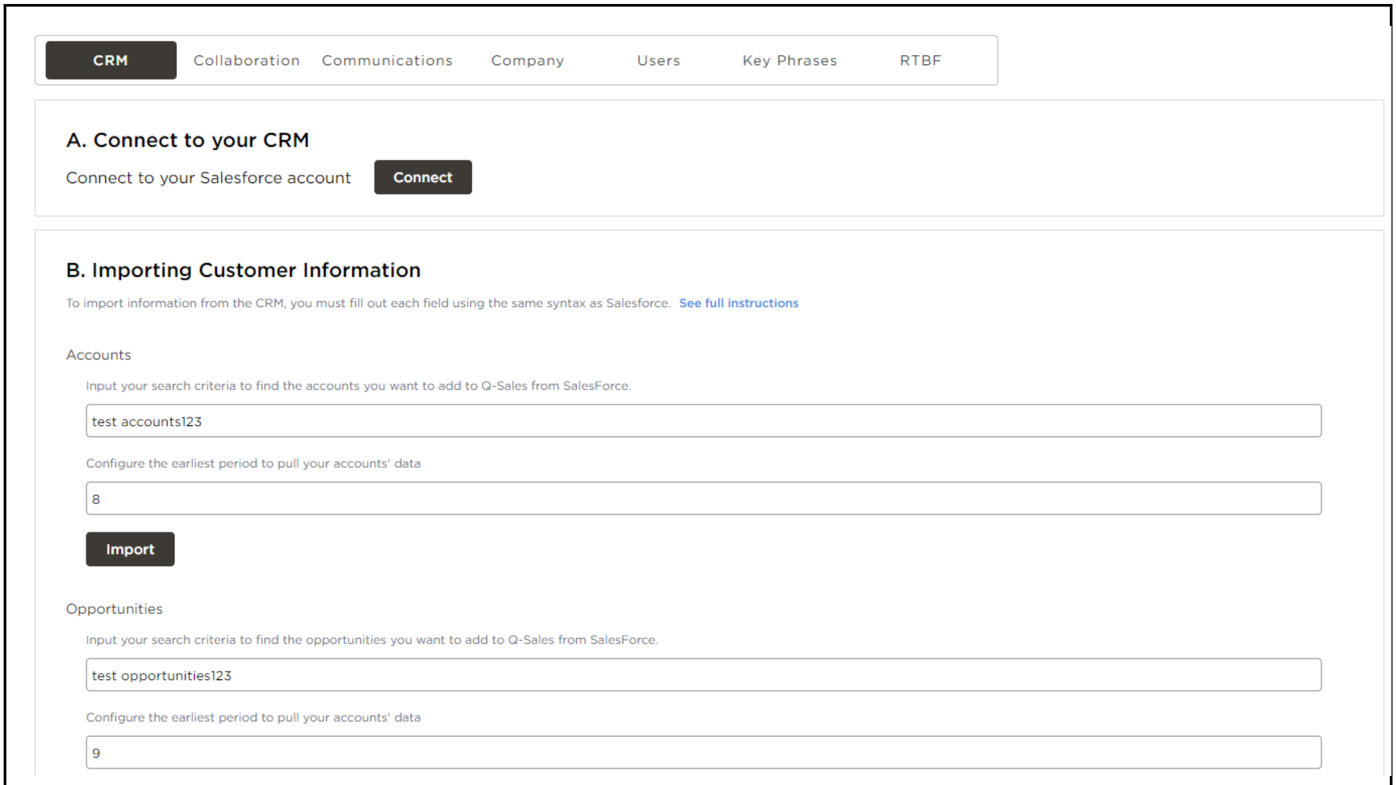
# Admin Page

Use the Admin page to administer your site. Only system administrators can access this page. There are 7 tabs on this page:

- CRM : Set up and manage customer relationship management software (e.g., Salesforce).
- Collaboration : Set up and video conferencing tools (e.g., Zoom).
- Communications : Set up and manage email and Slack.
- Company : Identify your business.
- Users : Add, edit, delete, and set roles for users.
- Key Phrases : Set up key words used by the MEDDIC sales methodologies.
- RTBF : Manage the “right to be forgotten” settings for users.

## CRM

Use the CRM tab (default) to manage customer relationship management software associated with “Q for Sales.”

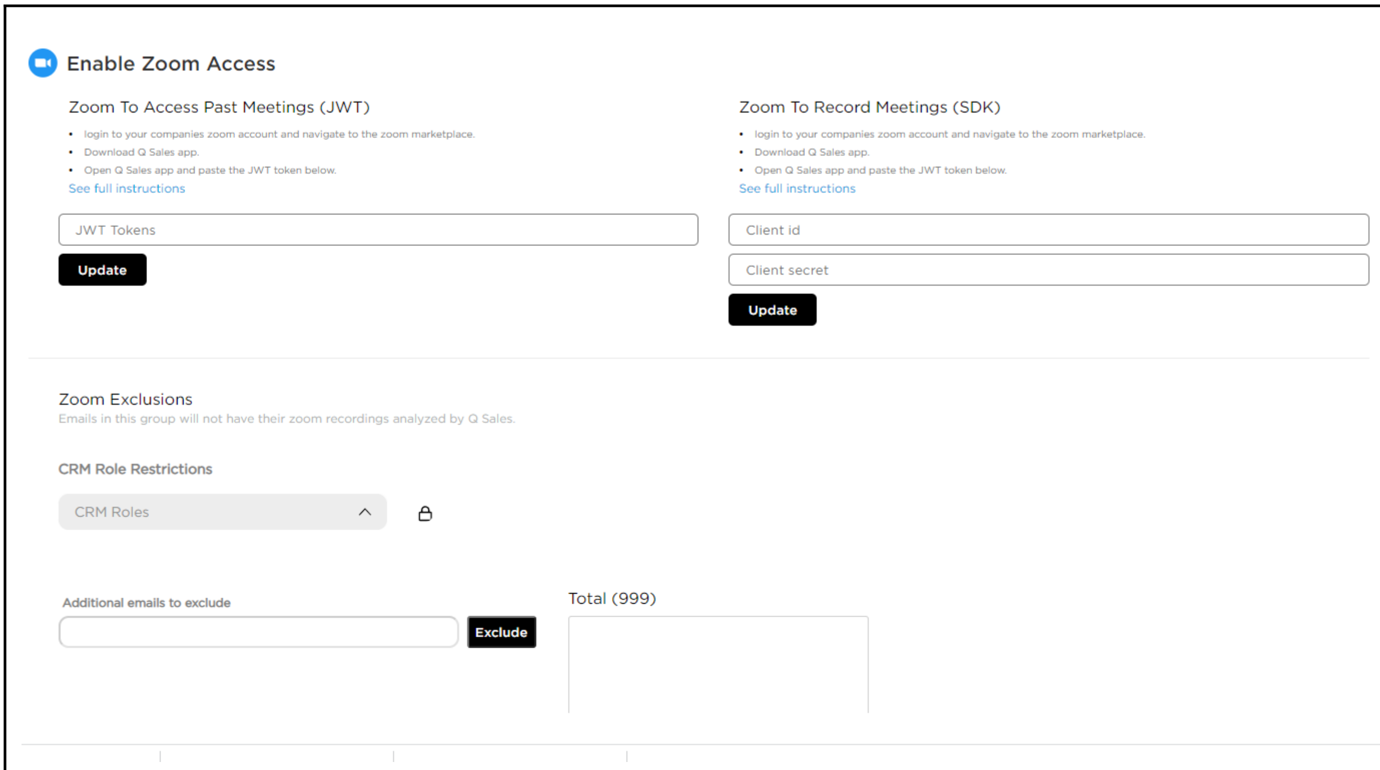



| | | |
|---|---|---|
| **1** | Tabs | Admin Page navigation tabs. |
| **2** | Connect to your CRM | Use this to set up and connect to your CRM (e.g., Salesforce). This establishes a data sync-up connection between the CRM and the tool. Follow the workflow to import customer information and users. |
| **3** | Importing Customer Information | To import customer information from the CRM, fill out each of the fields using the same syntax as Salesforce for search criteria and earliest period for accounts’ data, then click Import.<br>● Accounts<br>● Opportunities<br>● Contacts |

| | | |
|---|---|---|
| | | If you do not enter filters for the search criteria fields, you will import all information for each of these categories. Most administrators will want to do a phased rollout instead of a total import.<br><br>Use the earliest period for accounts’ data to set the number of times per day to pull data from the CRM. “Q for Sales” does not import information in real time so that server load is reduced.<br><br>More information is available by clicking the instructions link. |
| **4** | Importing Users | Use this to add users from Salesforce. Enter search criteria and earliest period for users’ data, then click Import. |

## Collaboration

Use this tab to set up and integrate video conferencing tools (e.g., Zoom). Zoom allows two types of users: JWT and SDK.

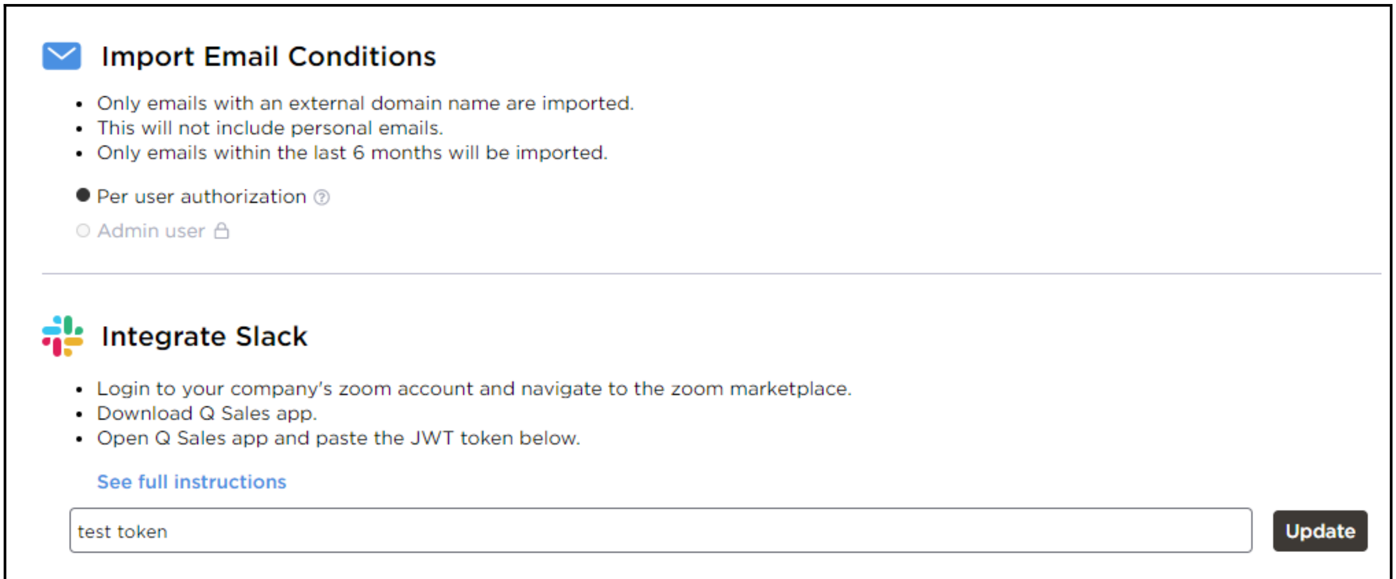



| | | |
|---|---|---|
| **1** | Enable Zoom to Access Past Meetings (JWT) | Creates a bot to access past meetings and builds an app that supports server-to-server integration with Zoom services without a need for user authorization. You need to obtain an encrypted token from Zoom for access and paste this into the JWT Tokens textbox. More information is available by clicking the instructions link. |
| **2** | Enable Zoom to Record Meetings (SDK) | Creates a real-time bot to record meetings and builds mobile, desktop, progressive web apps, and hybrid apps that integrate Zoom Client functionalities. You need to get SDK credentials from Zoom and paste them into the Client ID and secret textboxes. More information is available by clicking the instructions link. |

| | | |
|---|---|---|
| **3** | Zoom Exclusions | Add emails that are not to be analyzed by “Q for Sales” in Zoom meetings. For example, you can exclude all except people with a Salesforce account. |
| **4** | CRM Role Restrictions | Use this to specify rules for:<br>● additional emails to exclude<br>● emails not to exclude |

## Communications

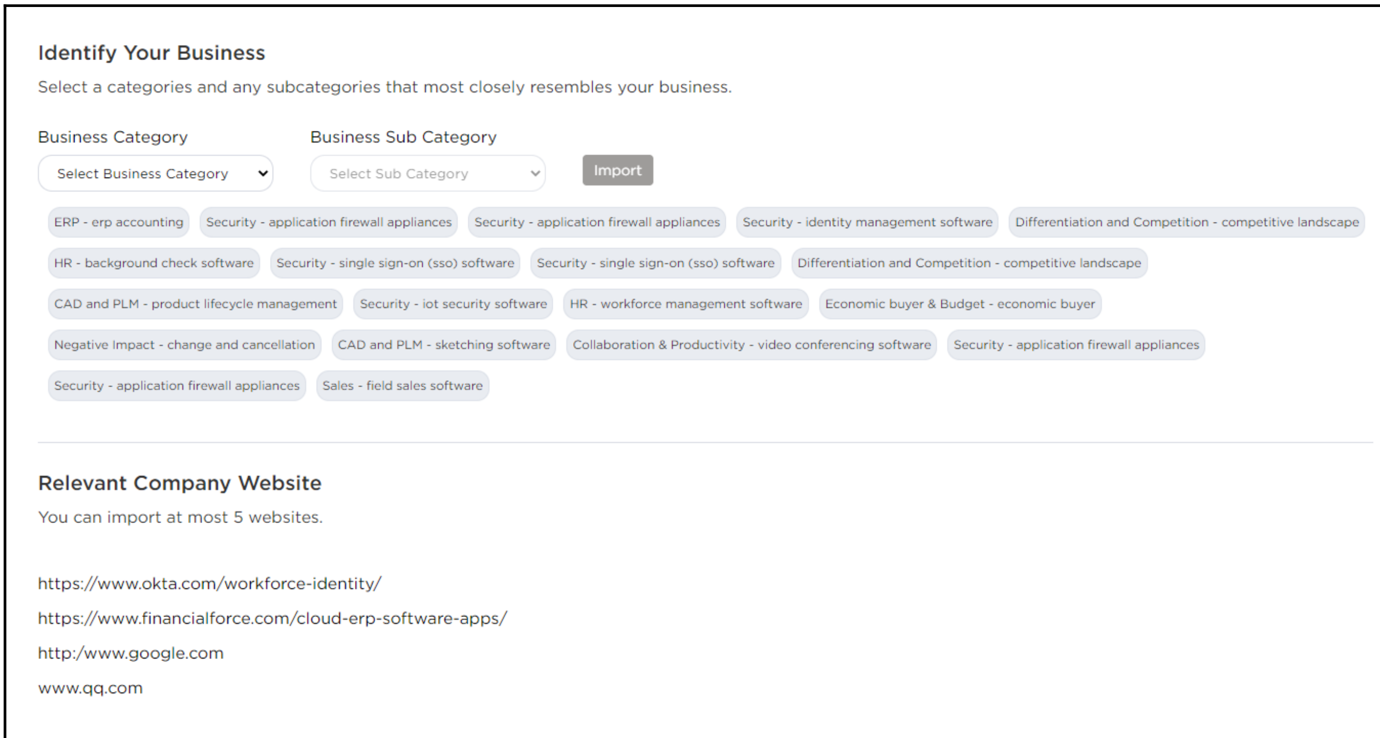
Use this tab to set up and manage email and Slack.




| | | |
|---|---|---|
| **1** | Import Email Conditions | Email integration is done by individual sales reps rather than system administrators. Sales reps authorize emails from the personal page (see Authorize Collaboration under the [Users] tab). |
| **2** | Integrate Slack | Use the Slack configuration to add a token for Slack integration. |

## Company

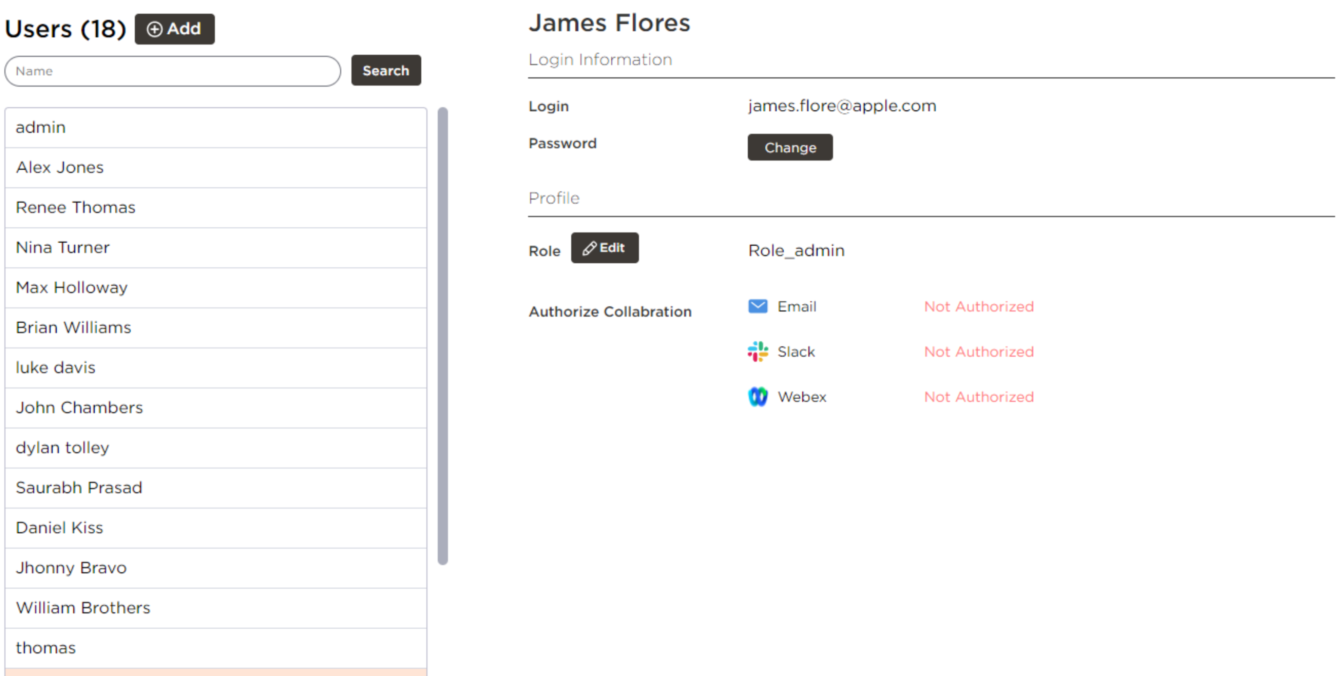
Use this tab to identify your business.

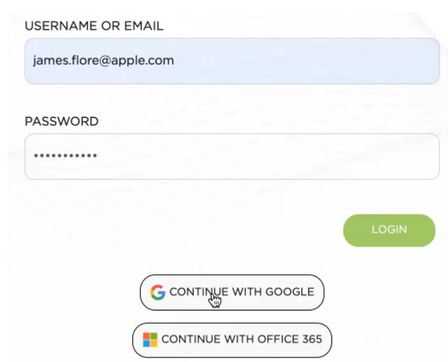



| | | |
|---|---|---|
| **1** | Identify Your Business | Import industry key phrases (key words) according to your type of business. Select your business type from the supported business categories, select a sub category, then click Import. The imported key phrases will be listed in Key Phrases. |
| **2** | Relevant Company Website | Enter up to 5 websites related to your business (including competitors). These sites will be crawled for additional key phrases. |

## Users

Use this tab to add, edit, delete, and set roles for users.

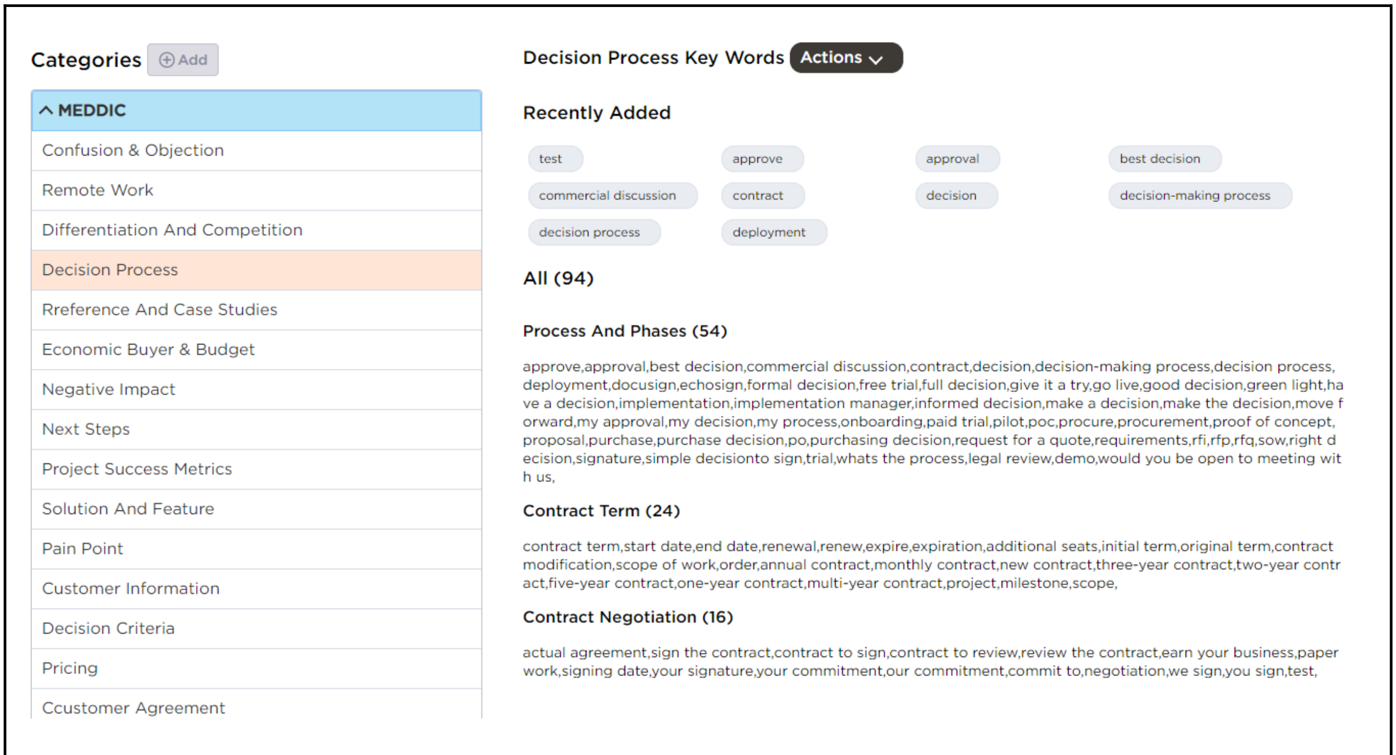



<table>
<tr>
<td>1</td>
<td>Users List Pane</td>
<td>
<ul>
<li>Users are typically imported from the Importing Customer Information in the <u>CRM</u> tab.</li>
<li>Click Add (+) to add a user.</li>
<li>Click a user to edit their information (right pane).</li>
<li>Use delete to remove a user.</li>
</ul>
</td>
</tr>
<tr>
<td>2</td>
<td>User Information pane</td>
<td>
Edit the user information:
<ul>
<li>Login Information : User name and password</li>
<li>Profile : Role (Seller, Manager, or Admin)</li>
<li>Authorize Collaboration : Authorize email (Google, Microsoft Office 365), Slack (done by admin), and Webex (future release).</li>
</ul>
Note: For login, users do not have to enter their Uniphore “Q for Sales” login / password. They can use their Gmail or Office 365 accounts. During onboarding, new users will get an email notification that guides them through the login process.


</td>
</tr>
</table>

## Key Phrases

Set up key word definitions used at runtime based on the MEDDIC sales methodologies.




| | | |
|---|---|---|
| **1** | Categories | Shows categories for MEDDIC key words as well as INDUSTRY-specific key words that you have imported using Identify Your Business under the Company tab. Use Add (+) to add categories. |
| **2** | Decision Process Key Words | Use the Actions pulldown to add key words to a category. The key words are listed by category. |

## RTBF

Use this tab to set up and manage the “right to be forgotten” for employees and customers.


| | | |
|---|---|---|
| **1** | Select User Type | Two selections are available:<br>● Employee : An employee of your company.<br>● Customer : A customer involved in a deal with your company.<br><br>Once an employee or customer is found and selected using Select Contacts, click Remove to remove them from the system. Selecting Remove means all their data (videos, transcripts, emails) will be removed from the system.<br>● A green check indicates they have been removed.<br>● Uncheck the checkbox to add them back to the system. |