



# "Q for Sales"

## User Guide

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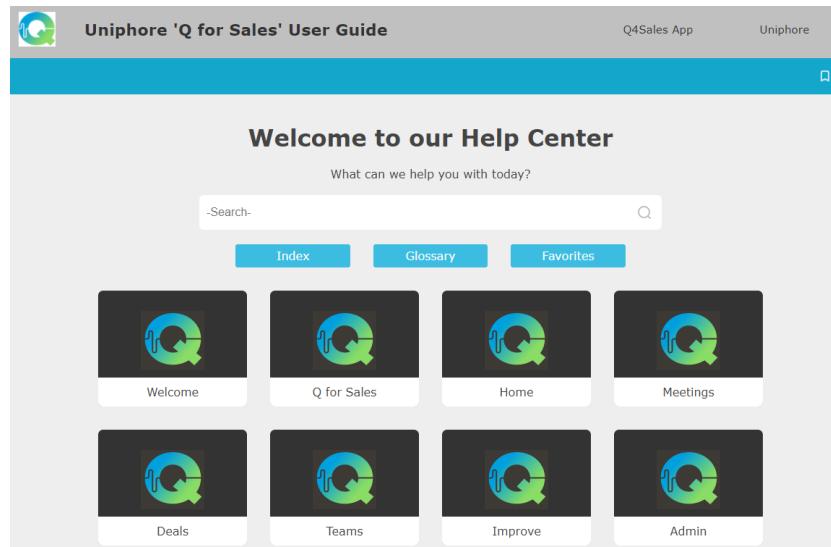
## Documentation Approach

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](mailto:michael.ye@uniphore.com)).

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## Glossary

<b>Admin</b>	System administrators who will manage the essential system configurations that allow end-users to use the “Q for sales” application.
<b>Convo Stats</b>	Conversational statistical metrics describing how a sales rep or team has been performing.
<b>Contact</b>	Refers to the individual contact persons within the customer entity who participate in the sales conversations with the sales team.
<b>Customer</b>	Refers to the business entity and the related group of people who are being dealt with by the sales team to create a deal.
<b>Deal</b>	The sales opportunity that sales reps manage through the ongoing sales meetings and conversations with their clients.
<b>Engagement</b>	Indicates the participants’ degree of engagement during the ongoing conversation
<b>Sentiment</b>	Indicates the positiveness of participants’ emotional reactions.
<b>EQ (Score)</b>	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.
<b>Manager</b>	A sales manager using “Q for Sales” and managing a sales team typically composed of sales reps.
<b>MEDDIC</b>	Sales technique framework used by the sales teams to drive efficient deal processes.
<b>Meeting participant</b>	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.
<b>Meeting moments</b>	Moments during the meeting, when certain discussion topics are brought up or meeting participants demonstrate significant emotional swings.
<b>Q for Sales</b>	Uniphore application that provides insights into meeting participants' emotional intelligence and correlates the customer EQ to sales deals.
<b>Q Score</b>	A machine-generated performance indicator of a sales rep's techniques.
<b>Real-time EQ</b>	The real-time sentiment and engagement status of meeting participants (customer or sales team).
<b>Rep</b>	Sales Representative from the company using “Q for Sales” as a tool for making deals with customers.
<b>RTBF</b>	“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:

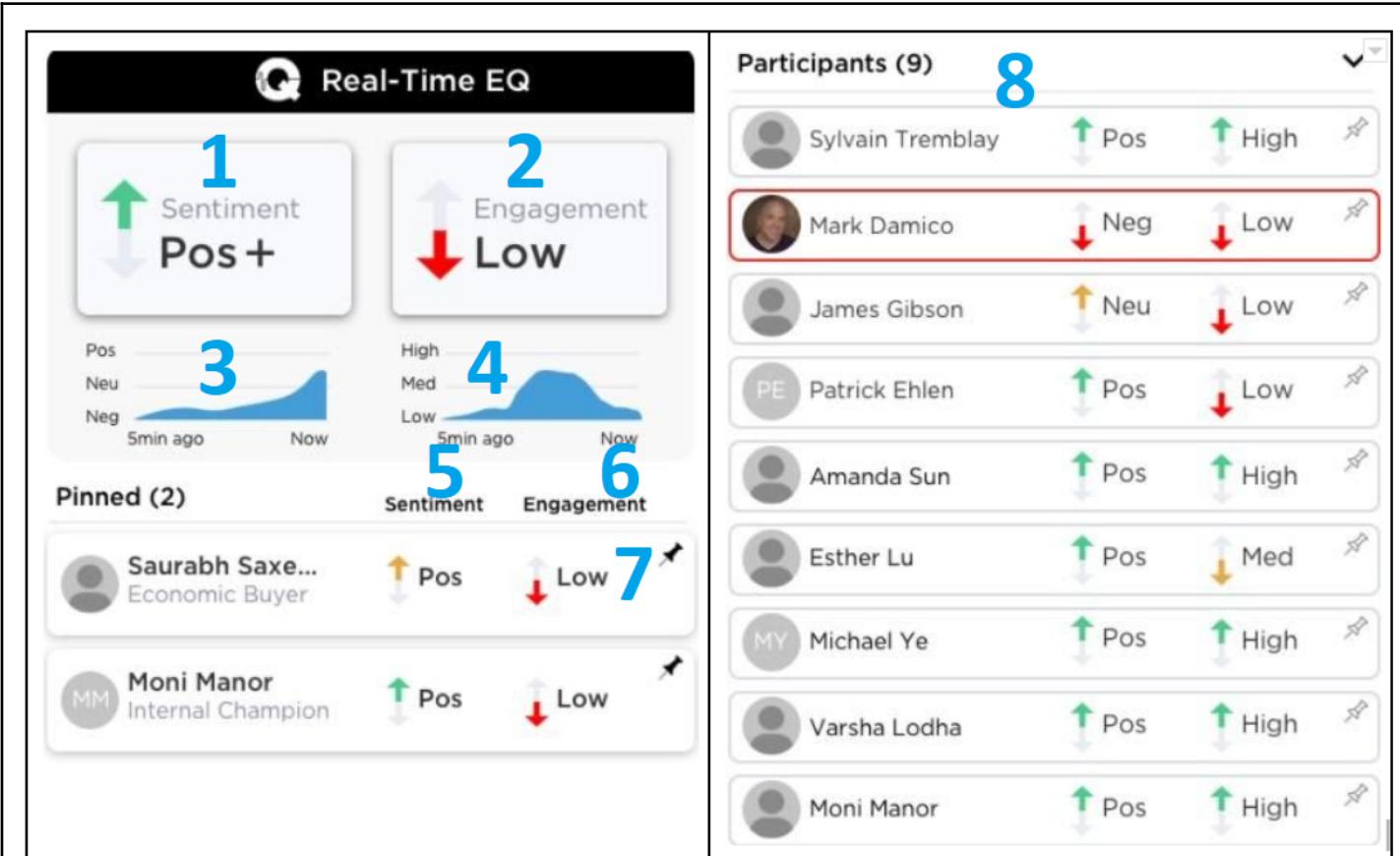
- To fully utilize the capabilities of “Q for Sales,” you should plan your sales meetings with your corporate email/calendar account. Gmail and Office 365 are also supported for email and calendar, however Zoom email is not supported.
- Launch meetings through your corporate Zoom account. No other video 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). <ul style="list-style-type: none"> <li>• Positive</li> <li>• Neutral</li> <li>• Negative</li> </ul>
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). <ul style="list-style-type: none"> <li>• High</li> <li>• Medium</li> <li>• Low</li> </ul>
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.

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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.

The screenshot shows the Q for Sales Home Page with the following components:

- Left Sidebar:** Includes icons for Home, Meetings, Deals, Teams, Improve, and Admin.
- Welcome Back, James!**: Personal greeting at the top.
- User Profile:** Shows James Franco, a notification bell, and language settings (English).
- Q Score™:** Shows a line graph with an orange line and a value of 124 pts. A message indicates a 20% increase from last week.
- Active Deals:** A scatter plot showing Engagement (X-axis) vs. Sentiment (Y-axis). Data points are colored blue, green, and red. A callout for Apple shows a deal worth \$3.4M in Jan 2022.
- Upcoming Meetings:** Lists meetings for Amplitude and Medallia with details like date, time, and participants.
- Customer Reactions:** A line graph showing Sentiment (blue line) and Engagement (purple line) over time from January to December. A callout notes a 10% spike in engagement in December.
- Convo Stats:** Shows Empathy (89%) and Politeness levels (Low, Neutral, High).

<b>1</b>	<b>Q Score</b>	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).
<b>2</b>	<b>Convo Stats</b>	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: <ul style="list-style-type: none"> <li>Empathy: Shown reps' empathy toward the customer as a percentage.</li> <li>Politeness: Shown reps' politeness toward the customer as low, medium, or high.</li> <li>Talk Ratio: Talk ratio of rep to customer. The bookended bar shows the ideal talk ratio range.</li> </ul>

		<p><b>Talk Ratio</b> ⓘ <b>30%</b></p> <p>0% 20% 40% 100%</p> <ul style="list-style-type: none"> <li>• Talk Speed: Rep talk speed. The bookended bar shows the ideal talk speed range.</li> </ul> <p><b>Talk Speed</b> ⓘ <b>165 w/min</b></p> <p>0 105 120 135 235+</p>
<b>3</b>	Active Deals	<p>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:</p> <ul style="list-style-type: none"> <li>• Sentiment: On the y-axis (positive up, negative down)</li> <li>• Engagement: On the x-axis (low left, high right)</li> </ul> <p>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.</p>
<b>4</b>	Customer Reactions	<p>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.</p>
<b>5</b>	Upcoming Meetings	<p>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).</p>

# 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](#)

The screenshot shows the "Meetings" page. On the left is a vertical sidebar with icons for Home, Meetings (selected), Deals, Teams, Improve, and Admin. The main area is titled "Meetings" and shows "3 Upcoming Meetings" from Dec 11 2021 - Dec 16 2021. The meetings are listed by day: Friday, December 10, has one customer meeting; Thursday, December 9, has one customer meeting; and Saturday, December 12, has one customer meeting.

## Meeting Preparation

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

This screenshot shows the "Meeting Preparation" tab. It displays "3 Upcoming Meetings" from Dec 12 2021 - Dec 17 2021. The meetings are listed: Saturday, December 12, has one customer meeting (marked with a blue '1'); Saturday, December 17, has one customer meeting (marked with a blue '2'); and Thursday, December 9, has one customer meeting. At the bottom, there is a "Date Range" input field with the placeholder text: "Select a date range for the meetings you want to display. Once selected, click the Apply button".

		<p>button for the date range to take effect.</p>
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	<p>Displays the following information about the deal:</p> <ul style="list-style-type: none"> <li>• Name</li> <li>• Amount</li> <li>• Creation date</li> <li>• Upcoming meeting (links to meeting information page).</li> </ul>
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 " <a href="#">Contact insights</a> " 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.

<span>Meeting Preparation</span> <span><span>Past Meetings</span></span>						
<span>Filter by</span> <span>Sep 10 2021 - Dec 10 2021</span> <span>Account</span> <span>Deal Value</span> <span>Deal Stage</span> <span><span>Reset</span></span>						
<span>View selected filters</span>						
<span>TODAY</span> <span>Showing: 0 meetings</span> <span>Date</span> <span>Sentiment</span> <span>Engagement</span> <span>Deal Stage</span> <span>Key Topics</span>						
<span>No Meetings Found</span>						
<span>YESTERDAY</span> <span>Showing: 0 meetings</span> <span>Date</span> <span>Sentiment</span> <span>Engagement</span> <span>Deal Stage</span> <span>Key Topics</span>						
<span>No Meetings Found</span>						
<span>-2 DAYS</span> <span>Showing: 3 meetings</span> <span>Date ↓</span> <span>Sentiment</span> <span>Engagement</span> <span>Deal Stage</span> <span>Key Topics</span>						
 <span>Amplitude 600K   Nov 2021 Implementation off Nov 4, 2021 03:20 PM</span> <span>Low</span> <span>Med</span> <span>Procurement</span> <span>Long Implementation Cycle</span>						
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.				

<b>5</b>	Reset	Reset page to default and show all meetings.
<b>6</b>	Date from Today	
<b>7</b>	Showing	Meeting count for that day. Click a meeting icon to go to the <a href="#">Meeting Replay</a> page. 
<b>8</b>	Meeting Date	Sortable date of meetings.
<b>9</b>	Sentiment	Level of sentiment (Positive, Neutral, Negative).
<b>10</b>	Engagement	Level of engagement (Low, Medium, High).
<b>11</b>	Deal Stage	Deal stage.
<b>12</b>	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.

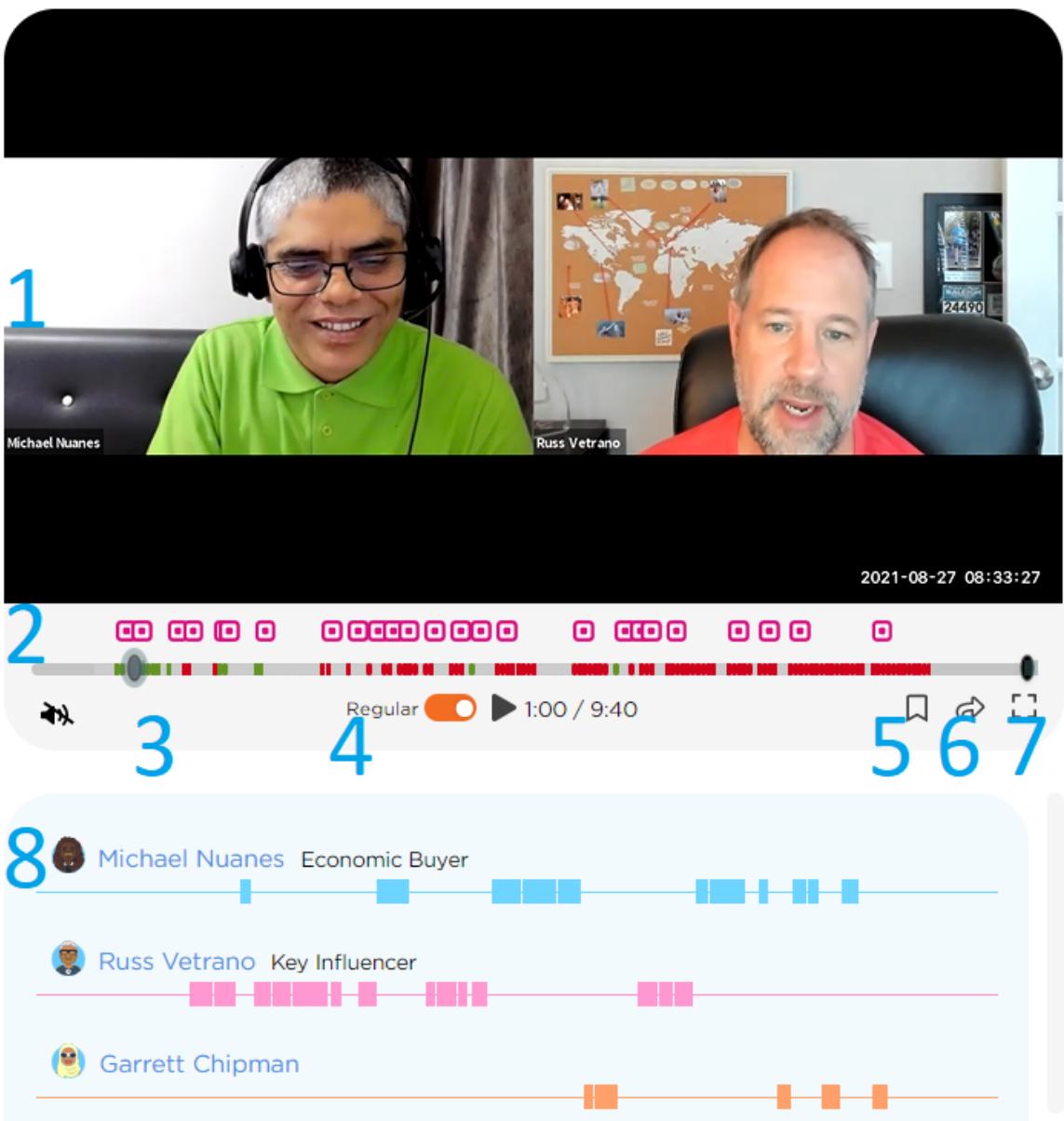
	<p><b>1</b> Implementation effort for S... 1 Month Ago</p> <p><b>2</b></p>	<p><b>3</b></p> <p><b>4</b></p> <p>Amplitude Account 600K Sentiment Engagement Sentiment Trend Engagement Trend</p> <p>How Did It Go Key Topics You Won Over Sentiment Trend Engagement</p> <p>Russ Vetrano Chief Architect 😊 High</p> <p>Who Needs More Work Sentiment Trend Engagement</p> <p>Michael Nuances VP, Application Engineering 😕 Med</p> <p>Critical Moments See More Related</p> <p>Insights Convos Stats Transcript Comments Related</p>
<b>1</b>	Top Ribbon	Meeting Information. See <a href="#">Top Ribbon - Meeting Information</a> .
<b>2</b>	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 <a href="#">Left Pane – Video Area and Buttons</a> .
<b>3</b>	Middle Pane - Summary Information	<p>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:</p> <ul style="list-style-type: none"> <li>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.</li> <li>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.</li> <li>Next best action. It shows the key discussion topics to focus, to improve the overall customer EQ and the deal winning probability.</li> </ul> <p>This pane is controlled by the five buttons in the right pane (see below).</p>
<b>4</b>	Right Pane - Navigation	<p>Choose these five buttons to show different summaries in the middle pane:</p> <ul style="list-style-type: none"> <li><a href="#">Insights</a> (default): Two buttons: How Did it Go and Key Topics.</li> <li><a href="#">Convos Stats</a>: Shows the metrics of reps' conversational techniques, such as</li> </ul>

		<p>empathy level, talk ratio, politeness, talk speed, etc.</p> <ul style="list-style-type: none"> <li>• <a href="#">Transcript</a>: Shows transcript of the meeting.</li> <li>• <a href="#">Comments</a>: Allows reps to review the advice provided by their managers. Managers can comment on either the whole sales meeting or individual key moments.</li> <li>• <a href="#">Related</a>: Shows all the other meetings associated with the same deal</li> <li>• <a href="#">Bookmarks</a>: Shows manually tagged bookmarks on the meeting video.</li> </ul>
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## Top Ribbon – Meeting Information

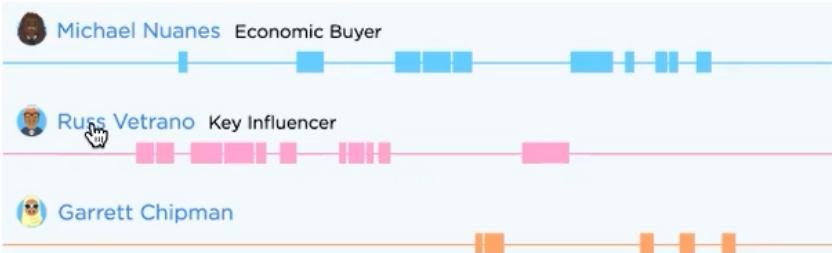
Implementation effort for S... 1 Month Ago	 Amplitude Account	600K Deal Value	 Sentiment	 Med Engagement	 Sentiment Trend	 Engagement Trend
<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>
<b>1</b>	Meeting Name	Name of the meeting.				
<b>2</b>	Account Name	Name of the account.				
<b>3</b>	Deal Size	Size of the deal (e.g., dollars).				
<b>4</b>	Sentiment	Average sentiment for this meeting.				
<b>5</b>	Engagement	Average engagement for this meeting.				
<b>6</b>	Sentiment Trend	Sentiment trend graph for this meeting.				
<b>7</b>	Engagement Trend	Engagement trend for this meeting.				

## Left Pane – Video Area and Controls



<b>1</b>	Video Display	Video display area.
<b>2</b>	Key (Critical) Moments	<p>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:</p> <ul style="list-style-type: none"> <li>Red: indicates negative sentiment</li> </ul> 
<b>3</b>	Video Track/Controls	Mute, Play, Regular, Full Screen, etc.

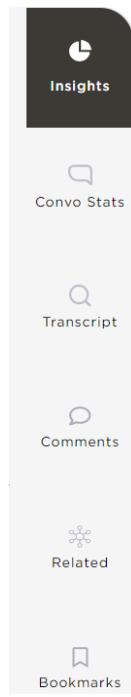
4	Regular	<p>Toggles between regular view and Spider Web view, which shows the emotional analysis of the person.</p> <ul style="list-style-type: none"> <li>• Emotional Score: ***</li> <li>• Secondary Emotion: ***</li> <li>• Satisfaction: ***</li> <li>• Activation: ***</li> <li>• Engagement: ***</li> <li>• Happiness: ***</li> <li>• Surprise: ***</li> <li>• Anger: ***</li> <li>• Disgust: ***</li> <li>• Fear: ***</li> <li>• Sadness: ***</li> </ul>
5	Bookmarks	<p>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.</p>
6	Share	<p>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.</p>
7		Full-screen view. Click to enable.

8	<b>Speech Participant Track</b>  <p>Michael Nuances Economic Buyer</p> <p>Russ Vetrano Key Influencer</p> <p>Garrett Chipman</p>
	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

The screenshot shows the "How Did it Go" interface with three main sections:

- You Won Over:** Shows Russ Vetrano (Chief Architect) with a neutral sentiment (neutral emoji), a positive sentiment trend (green line with dots), and high engagement (purple circle with a plus sign). Includes "Convo Stats" and a transcript link.
- Who Needs More Work:** Shows Michael Nuances (VP, Application Engineering) with a negative sentiment (sad emoji), a downward-sloping sentiment trend (red line with dots), and medium engagement (blue circle with a plus sign). Includes a transcript link.
- Critical Moments:** Shows a "Very Negative" moment with a quote: "Oh, so that is a 50% increase in their acquire time, I think that is going to have a lot of impact not only on the launch side, but also, I think, on the operations, they are waiting for this solution, and you know they have set their own timelines." It includes a video snippet from 3:25 - 3:50, sharing icons, and a "See More" link.

<b>1</b>	You Won Over	Displays participant(s) you have been successful with. Shows participant information, including their sentiment, sentiment trend, and engagement.
<b>2</b>	Who Needs Work	Displays participant(s) you have been unsuccessful with. Shows participant information, including their sentiment, sentiment trend, and engagement.
<b>3</b>	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.

		<p><b>Very Negative</b></p> <p>"Oh, so that is a 50% increase in their acquire time, I think that is going to have a lot of impact not only on the launch side, but also, I think, on the operations, they are waiting for this solution, and you know they have set their own timelines."</p> <p>3:25 - 3:50</p>
<b>4</b>	Next Best Action	<p>Shows two things:</p> <ul style="list-style-type: none"> <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> <p><b>Next Best Action</b></p> <p>"Talk with Susan - it's possible to use the SAML registry first for SSO and do the actual setup later."</p> <p>"Include the solution architect and come up with a phasing approach that lets them meet target deadlines while allowing you to complete the project."</p> <p><b>Topics To Focus</b></p> <p>Long implementation Cycle      Poor Quality      Integrates Well      Verify Identity</p>

## 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.

	<b>1, 2, 3</b>	<p>Key Topic categories for this meeting. Your deal will have different topics based on how you set up your topics using "<a href="#">Key Phrases</a>" in the <a href="#">Admin Page</a>.</p>
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The screenshot shows the "Key Phrases" section of the Q for Sales Admin interface. At the top, there are tabs for Company, Users, Integrations, Key Phrases (which is selected), and RTBF. Below the tabs, there are two main sections: "Categories" and "Decision Process Key Words".

**Categories:**

- Decision Criteria
- Remote Work
- Reference And Case Studies
- Negative Impact
- Project Success Metrics
- Confusion & Objection
- Differentiation And Competition
- Solution And Feature
- Customer Information
- Decision Process
- Economic Buyer & Budget
- Pain Point
- Next Steps

**Decision Process Key Words:**

Recently Added:

- actual agreement
- sign the contract
- contract to sign
- contract to review
- review the contract
- earn your business
- paperwork
- signing date
- your signature
- your commitment

All (111)

**Decision Maker And Influencer (18):**

committee,decision-maker,decision-makers,director,gm,her boss,his boss,my boss,my ceo,my direct or,my manager,my vp,our ceo,president,project manager,stakeholders,vp,your role,

**Process And Phases (54):**

approve,approval,approval process,best decision,commercial discussion,contract,decision,decision-making process,decision process,deployment,docsign,echosign,formal decision,full decision,give it a try,good decision,green light,have a decision,implementation,implementation manager,informed decision,make a decision,make the decision,move forward,my approval,my decision,my process,no bording,paid trial,pilot,poc,procure,procurement,proof of concept,proposal,purchase,purchase decision,po,purchasing decision,request for a quote,requirements,rfi,rfp,rfq,sow,right decision,signature,si

## Convo Stats

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

The screenshot shows the Convo Stats interface. It features a "Statistics Summary" section with various performance metrics and a "Team Members" section showing data for a specific account executive.

**Statistics Summary:**

- Talk Ratio: 27%
- Average Empathy: 86%
- Average Politeness: Polite
- Average Speaking Pace: 156 w/m
- Longest Rep Monologue: -
- Longest Customer Monologue: -

**Team Members:**

Empathy	Politeness	Speaking Pace (w/m)
86%	Polite	156

**Team Member Details:**

- Garrett Chipman (Account Executive)
- 86% Empathy
- Polite Politeness
- 156 Speaking Pace (w/m)

**Annotations:**

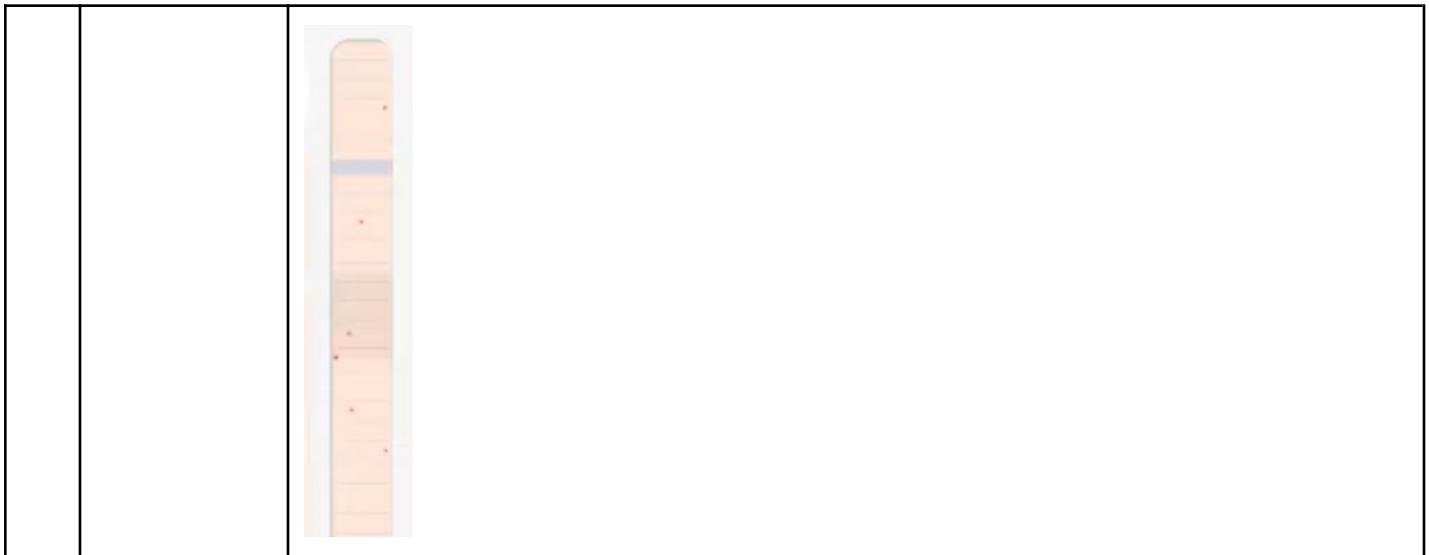
- Statistics Summary:** Shows average values of all sales reps for the following:
  - Talk Ratio: Shows the percentage that the sales rep spoke during the meeting. It is an aggregated value across all sales reps attending this meeting.
  - Average Empathy: Shows the average percentage of sales reps'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

		<p>per minute.</p> <ul style="list-style-type: none"> <li>• Longest Rep Monologue: Longest monologue of all sales reps.</li> <li>• Longest Customer Monologue: Longest customer monologue.</li> </ul>
2	Team Members	<p>Shows individual values of each sales rep for the following:</p> <ul style="list-style-type: none"> <li>• Empathy: Shows the sales rep's empathy toward the customer as a percentage value.</li> <li>• Politeness: Shows the sales rep's politeness toward the customer as a percentage value.</li> <li>• Speaking Pace: Show average talking speed of sales rep in words per minute.</li> </ul>

## 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	<p>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.</p>
2	Ribbon Dots	<p>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.</p>



## Comments

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

James Franco Nov 24, 2021

Include the solution architect and come up with a phasing approach that lets them meet target deadlines while allowing you to complete the project.

1 Click the Add button to add a comment.

Add a comment **+ Add**

James Franco Nov 30, 2021

Talk with Susan - its possible to use the SAML registry first for SSO and do the actual setup later

Transcript

Comments

## Related

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

**Related**

Below are other meetings related to this deal

**Meetings (4)**

		Sentiment	Engagement
	Michael Nuanc... Jun 28, 03:20 PM	High	Med
	Term Agreeeme... Aug 6, 07:10 PM	Neutral	Med
	Term Agreeeme... Sep 29, 07:10 PM	Neutral	Med
	Implementatio... Nov 4, 03:20 PM	Low	Med

**Insights**

**Convo Stats**

**Transcript**

**Comments**

**Related**

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

Filter by <span style="border: 1px solid #ccc; padding: 2px;">Account</span> <span style="border: 1px solid #ccc; padding: 2px;">Deal Value</span> <span style="border: 1px solid #ccc; padding: 2px;">Start Date - End Date</span> <span style="border: 1px solid #ccc; padding: 2px;">Deal Stage</span> <span style="border: 1px solid #ccc; padding: 2px;">Reset</span>						
<b>Deals based on Customer Sentiment</b>						
Positive (1/... Neutral (3/14)      Negative (2/14)      Unclassified (8/14)						
Account	Deal Name	Value ↑	Projected Close Date	Deal Stage	Sentiment	Engagement
Cisco-upd...	Facebook Live	22M USD	Nov 21, 2021	Evaluation	Negative	Low
Affirma	Google AI	17M USD	Nov 21, 2021	Evaluation	Negative	Low
Cisco-upd...	Apple iPhone XII L...	15M USD	Nov 16, 2021	Proposal	-	-
Advocate	Samsung	14M USD	May 1, 2022	Proposal	-	-
Cisco-upd...	Upcoming hardware	13M USD	Nov 15, 2021	Proposal	-	-
Advanced ...	Samsung	12M USD	Nov 21, 2022	Qualification	-	-
<b>1</b>	Filter Ribbon	Filter by account, deal value, date range, and deal stage. Click Reset to return to default values.				
<b>2</b>	Deals Based on Customer Sentiment	Bar graph showing the number of deals by customer sentiment value: <ul style="list-style-type: none"> <li>● Positive</li> <li>● Neutral</li> <li>● Negative</li> <li>● Unclassified</li> </ul>				
<b>3</b>	Deal List	Summary information with sortable columns for all deals: <ul style="list-style-type: none"> <li>● Account icon and name : Click to see the <a href="#">Individual Deal View</a>.</li> <li>● Deal Name</li> <li>● Value (sortable)</li> <li>● Projected Close Date</li> <li>● Deal Stage</li> <li>● Sentiment (color coded)</li> <li>● Engagement (color coded)</li> </ul>				

## 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](#)

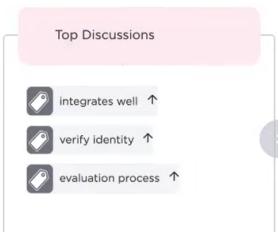
### Deal Overview

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.

The screenshot shows the 'Deal Overview' tab selected. At the top, there's a header with fields: Amplitude Account (Amplitude), eCommerce Platform Database (Deal Name), 600K (Deal Value), Jan 2022 (Deal Close Date), and Procurement (Deal Stage). Below the header, there are two line charts: 'Average Sentiment' (decreasing from ~0.7 to ~0.4) and 'Average Engagement' (increasing from ~0.4 to ~0.6). To the right, a 'Key Moments' section shows 7 entries from Nov 2021, sorted by highest relevance. The first entry is a video call titled 'Implementation effort for SSO' on Nov 4, 2021, at 15:20. The second entry is a transcript: 'Oh, so that is a 50% increase in their acquire time, I think that is going to have a lot of impact not only on the launch side, but also, I think, on the operations, they are waiting for this solution, and you know they have set their own timelines.' Below the charts and key moments, there are sections for 'Top Value Propositions' (No Data Available) and 'Top Confusions and Objections' (listing 'long implementation cycle', 'poor quality', 'challenge', and 'demo'). A date range selector at the bottom right shows '2021-'.

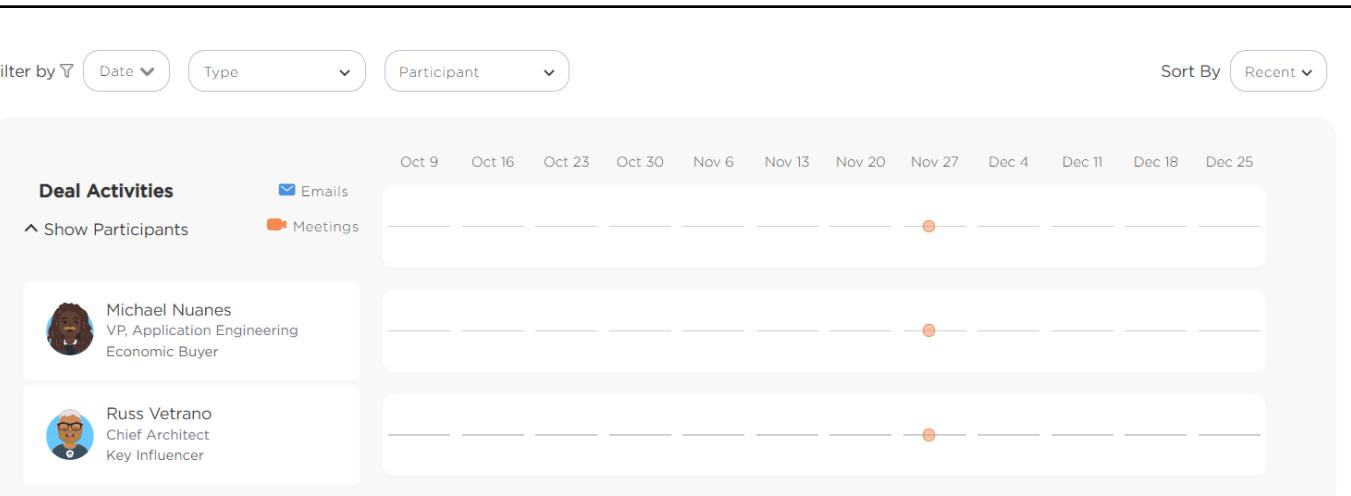
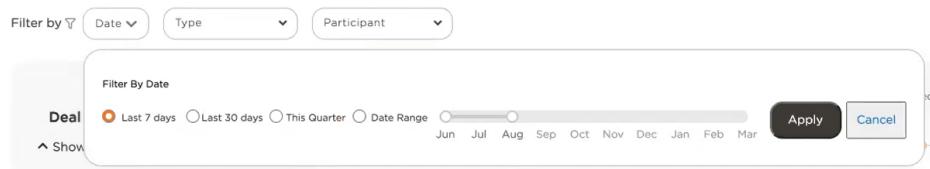
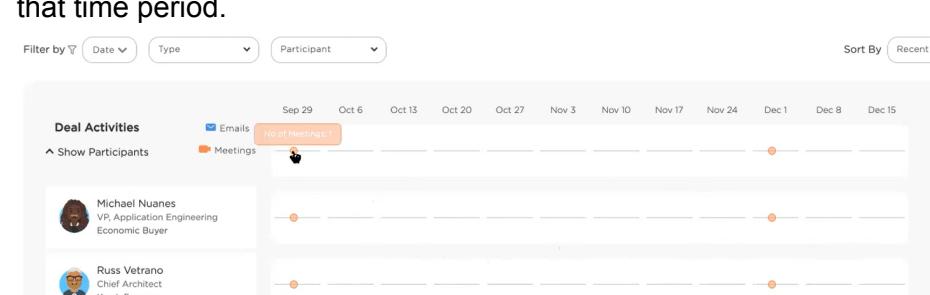
1	Top Ribbon	Shows Account Name, Deal Name, Deal Value, Deal Close Date, and Deal Stage.
---	------------	---

<b>2</b>	Average Sentiment	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.
<b>3</b>	Average Engagement	<p>“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.</p> <p>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.”</p>
<b>4</b>	Top Value Propositions	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.
		
<b>5</b>	Top Confusions and Objections	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.
		
<b>6</b>	Top Discussions	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.
		

<b>6</b>	Key Moments tab	The default tab shows key moments based on your selections in the left panel.
<b>7</b>	Meetings tab	Shows meeting information related to your selections in the left panel.
<b>8</b>	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	<p>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.</p> 
2	Filter by Type	<p>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.</p> 
3	Filter by Participant	<p>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.</p>

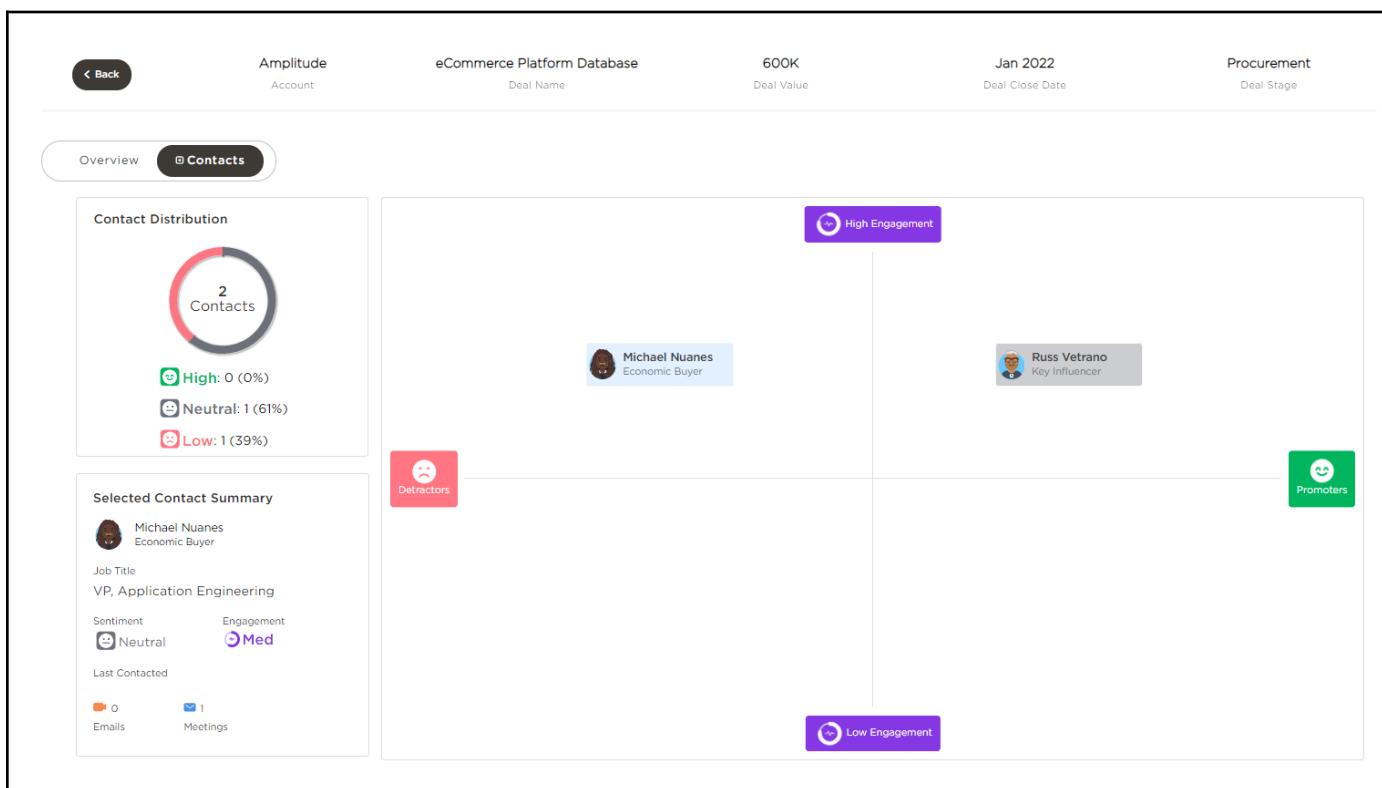
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<b>4</b>	Sort by	Use to sort display results.
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## Deal Contacts Tab

"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.



<b>1</b>	Top Ribbon	Shows Account Name, Deal Name, Deal Value, Deal Close Date, and Deal Stage
<b>2</b>	Contact Distribution	Shows the percentage of customer contacts whose EQ levels are high, neutral, and low.
<b>3</b>	High Engagement section	Shows customer contacts who are highly engaged.
<b>4</b>	Low Sentiment section	Shows customer contacts who have low sentiment.
<b>5</b>	High Sentiment section	Shows customer contacts who have high sentiment.
<b>6</b>	Low Engagement section	Shows customers who are poorly engaged.
<b>7</b>	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 <a href="#">Contact Detail Page</a> .
--	--	--

## 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.

The screenshot shows the "Contact Detail Page" for Michael Nuñez. At the top, there's a navigation bar with a back button, account information (Amplitude Account), a profile picture of Michael Nuñez (Economic Buyer), current sentiment (Current Sentiment), current engagement (Current Engagement), and impacts amount (600K Impacts Amount). Below this is a filter bar set to "eCommerce Platform Database".

Two line graphs are displayed: "Average Sentiment" (blue line) and "Average Engagement" (purple line), both showing a downward trend from Jan 2016 to Aug 2021. To the right, a "Key Moments" section lists a meeting titled "Implementation effort for SSO" (3:25-3:50) with a video thumbnail, a transcript snippet, and sentiment analysis (Very Negative +2).

On the left, two panels show "Top Value Propositions" (factor authentication, integrates well, verify identity) and "Top Confusions and Objections" (long implementation cycle, poor quality, challenge, demo). At the bottom, a "Contact Activities" section shows a timeline with a single entry for "Implementation effort for SSO" dated 2021-12-1.

<b>1</b>	Top Ribbon	Shows Account Name, Deal Name, Deal Value, Deal Close Date, and Deal Stage
<b>2</b>	Filter by	Allows you to see all the deals in which this person has been involved.
<b>3</b>	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.
<b>4</b>	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.
<b>5</b>	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.”

<b>6</b>	Contact Activities	Allows you to filter by date and type of deal.
<b>7</b>	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.

**Team Effect on Customer EQ**

High EQ Members	Customer Sentiment	Customer Engagement	Empathy	Politeness	Talk Ratio
Amanda Robinson	High	High	85% 🌟	Polite	35% 🌟
Anthony Baldair	High	Low	80% 🌟	Polite	38% 🌟
Joey Schmit	High	High	84% 🌟	Polite	40% 🌟

**1** Filter by: Sep 12 2021 - Dec 12 2021  View selected filters

**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:

- Sentiment (Positive-Neutral-Negative)
- Engagement (High-Medium-Low)

		<ul style="list-style-type: none"> <li>• Empathy</li> <li>• Politeness</li> <li>• Talk Ratio</li> </ul> <p>You can also sort the result of this table by those column headers.</p>
<b>4</b>	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.
<b>5</b>	Individual Icon	Click a rep's icon to go to a page that shows a manager's view of the rep's performance. See <a href="#">Manager View of Rep Performance</a> .

## 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.

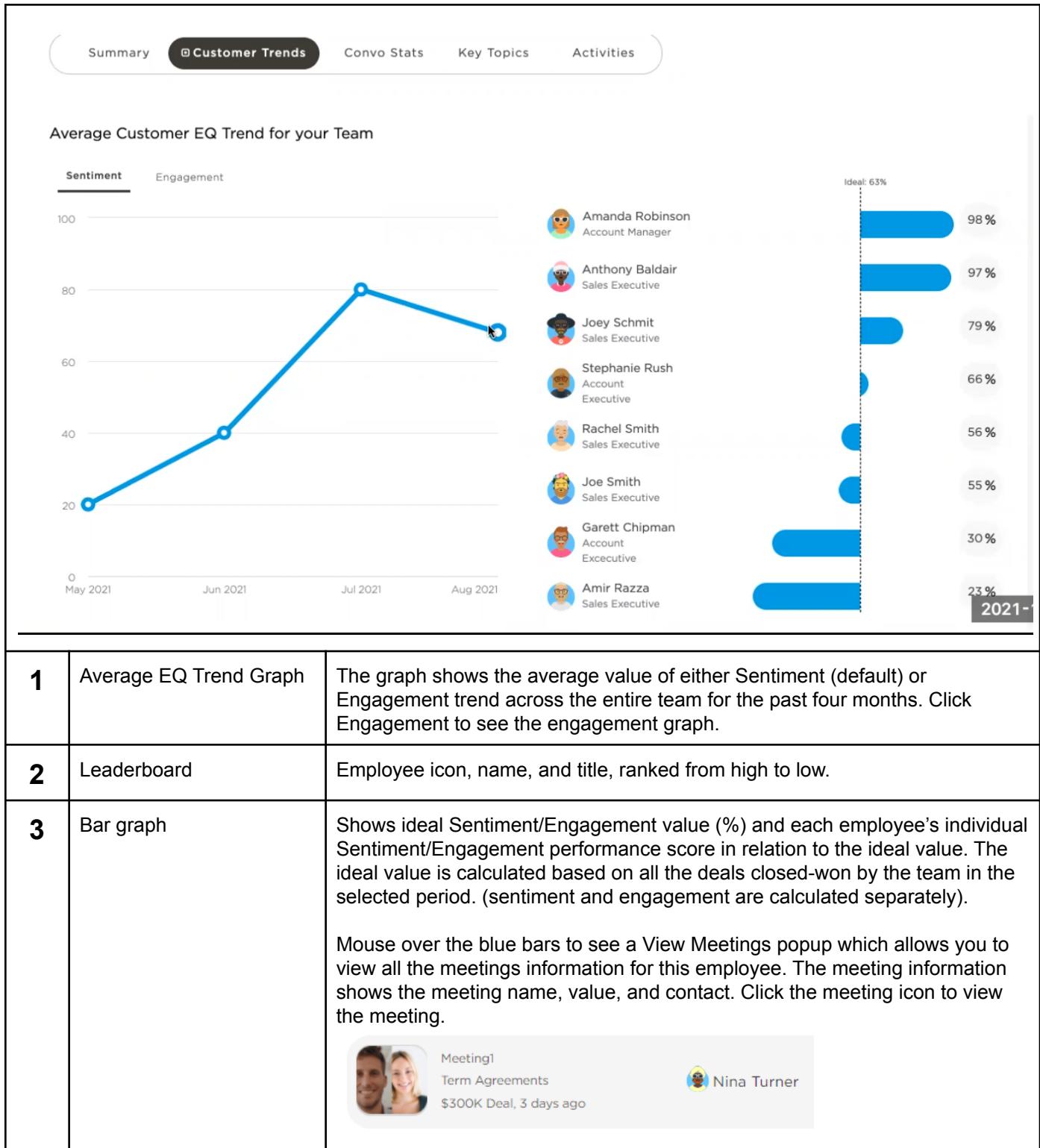
The screenshot shows the Manager View of Rep Performance for Amanda Robinson, an Account Manager. The top navigation bar includes a back button, a profile picture of Amanda, her name, and title, and four performance metrics: 208 Emails, 10 Sales Meetings, 15hrs Total Meeting Duration, and 4 Accounts Engaged. Below the navigation is a filter section for the date range Sep 28 2021 - Dec 28 2021. The main content area is divided into several sections: 'Amanda's Deals' (listing deals for Apple, MuleSoft, Slack, Snowflake, Cisco Webex, and Zoom), 'Amanda's EQ Review' (Customer EQ Sentiment: High, Engagement: High; Convo Stats: Empathy 89% (Green), Politeness Polite (Green), Talk Ratio 30% (Red), Talk Speed 130 w/m (Green)), and two panels for 'Moments that Went Well' and 'Moments that Went Poorly' (each showing examples from Apple, MuleSoft, and Snowflake with audio duration, transcription, and interaction icons). The overall interface is clean with a white background and light blue accents.

<b>1</b>	Filter by	Filter the sales activities (the base of this performance analysis) over a date range.
<b>2</b>	Activities	Shows activities the rep conducted: emails, number of meetings, total meeting duration, and number of accounts engaged. Click an icon for additional information.
<b>3</b>	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.
<b>4</b>	Review	Shows the following information over the selected period: <ul style="list-style-type: none"> <li>• 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</li> </ul>

		<p>frowny face - low).</p> <ul style="list-style-type: none"> <li>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.</li> </ul>
<b>5</b>	Moments	<p>Displays summary information for:</p> <ul style="list-style-type: none"> <li>Moments that Went Well (typically high sentiment and engagement values)</li> <li>Moments that Went Poorly (typically low sentiment and engagement values)</li> </ul> <p>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.</p> <p>EQ Icons: The top two icons show EQ associated with key topics for sentiment and engagement, respectively.</p>   <p>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.</p> <p>For video, comments, and share:</p> <ul style="list-style-type: none"> <li>Click the video icon to replay the video.</li> <li>Use the dialog balloon to add your comments.</li> <li>Use the Share icon to share via Slack</li> </ul> <div style="background-color: #f0f0f0; padding: 5px; display: flex; justify-content: space-between;"> <span>0:23-1:53</span> <span></span> <span></span> </div>

## Customer Trends

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



## Convo Stats

The Convo Stats tab shows the trend of conversational metrics.

Filter by Sep 28 2021 - Dec 28 2021 Reset

[View selected filters](#)

[Summary](#) [Customer Trends](#) **Convo Stats** [Key Topics](#) [Activities](#)

Team Average				Other Metrics			
Empathy	Politeness	Talk Ratio	Talking Speed	Longest Rep Monologue	Number Of Questions	Presentation Time	Longest Customer Story
60%	Polite	66%	150 w/m	10m	10	10 m	7 m

**Team Trend**

Employee	Empathy (%)	Talk Ratio (%)
Amanda Robinson Account Manager	98 %	65 %
Anthony Baldair Sales Executive	97 %	79 %
Joey Schmit Sales Executive	66 %	56 %
Stephanie Rush Account Executive	55 %	55 %
Rachel Smith Sales Executive		
Joe Smith		

<b>1</b>	<b>Filter by</b>	Filter over a date range. Reset will return to default settings.
<b>2</b>	<b>Team Average</b>	Shows team averages for: <ul style="list-style-type: none"> <li>Empathy: Percentage of sales reps' empathy toward the customer.</li> <li>Politeness: Average of sales reps' politeness toward the customer.</li> <li>Talk Ratio: Percentage of sales reps speaking during the meeting.</li> <li>Talking Speed: Talking speed of sales reps in words per minute.</li> </ul>
<b>3</b>	<b>Other Metrics</b>	Shows team metrics for: <ul style="list-style-type: none"> <li>Longest Rep Monologue: Longest monologue of all sales reps without customer response. Anything over two minutes is considered poor sales practice.</li> <li>Number of Questions: *** not for this release ***</li> <li>Presentation Time: *** not for this release ***</li> <li>Longest Customer Story: Longest customer monologue without rep interruption.</li> </ul>
<b>4</b>	<b>Team Trend Graph</b>	Shows team trend graphs and data for Empathy and Talk Ratio.
<b>5</b>	<b>Leaderboard</b>	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.

Filter by Sep 28 2021 - Dec 28 2021 Reset

[View selected filters](#)
[Summary](#)
[Customer Trends](#)
[Convo Stats](#)
**Key Topics**
[Activities](#)

^ Customer Objections

Strange X
Sorted By **Highest Relevance**

The first point of integration is capturing of audio data, you know typically that's integration with genesis and your ingress audio w...

0:23:1:53

The first point of integration is capturing of audio data, you know typically that's integration with genesis and your ingress audio w...

0:23:1:53

The first point of integration is capturing of audio data, you know typically that's integration with genesis and your ingress audio w...

0:23:1:53

Customer Value Propositions
Sales Cloud

MEDDIC
Sales Cloud

Information Pane
Sales Cloud

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	<p>Shows the meeting moments associated with the selections made in the left pane. Use Sorted by to sort topics by relevance and chronological order.</p> <p><b>EQ Icons:</b> The top two icons show EQ associated with key topics for sentiment and engagement, respectively.</p> <div style="text-align: center; margin-top: 10px;">   <span>+2</span> </div> <p>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.</p> <p>For video, comments, and share:</p> <ul style="list-style-type: none"> <li>• Click the video icon to replay the video.</li> <li>• Use the dialog balloon to add your comments.</li> <li>• Use the Share icon to share via Slack</li> </ul>



## Activities

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

Filter by  Sep 28 2021 - Dec 28 2021 **Reset**

[View selected filters](#)

[Summary](#) [Customer Trends](#) [Convo Stats](#) [Key Topics](#) **Activities**

Team Total					
	104		30	Total Meeting Duration	1860 hrs
				Average Meeting Duration	62 m

**Team Trend**

Email Exchanges Sales Meetings

Team Member	Role	Icon	Value	Percentage
Amanda Robinson	Account Manager		98 %	98 %
Anthony Baldair	Sales Executive		97 %	97 %
Joey Schmit	Sales Executive		79 %	79 %
Stephanie Rush	Account Executive		66 %	66 %
Rachel Smith	Sales Executive		56 %	56 %
Joe Smith			55 %	55 %

<b>1</b>	<b>Filter by</b>	Filter over a date range. Reset will return to default settings.
<b>2</b>	<b>Team Total</b>	Shows data for: <ul style="list-style-type: none"> <li>Emails: Number of emails during the period.</li> <li>Sales Meetings: Number of sales meetings during the period.</li> <li>Total Meeting Duration: Sum of all meeting duration during the period.</li> <li>Average Meeting Duration: Average meeting duration during the period.</li> </ul>
<b>3</b>	<b>Team Trend</b>	Shows trending graphs and bar charts for: <ul style="list-style-type: none"> <li>Email exchanges: Number of emails.</li> <li>Sales Meetings: Number of sales meetings.</li> </ul>
<b>4</b>	<b>Leaderboard</b>	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. <ul style="list-style-type: none"> <li>Click a team member's icon to see their individual page.</li> <li>Click a rep's blue bar to see more information about their meetings related to emails and sales meetings.</li> </ul>



# 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

<b>1</b>	Filter Selections	Filter and analyze meetings by date and account.
<b>2</b>	Activities	Shows emails, number of meetings, total meeting duration, and number of accounts engaged. Click an icon for additional information.
<b>3</b>	Customer EQ	Shows average customer EQ for sentiment and engagement.
<b>4</b>	Empathy Correlation with Customer EQ	Shows Customer EQ trending and correlation of customer empathy with customer sentiment and customer engagement. <ul style="list-style-type: none"> <li>• Mouse over the graph icons to see more information (date, metrics).</li> <li>• Click the buttons in the legend to turn on/off the respective graphs.</li> </ul>

		<p><b>Empathy Correlation With Customer EQ</b></p> <table border="1"> <thead> <tr> <th>Week</th> <th>Sentiment (%)</th> <th>Engagement (%)</th> <th>Empathy (%)</th> </tr> </thead> <tbody> <tr><td>Jan '21</td><td>~75</td><td>~70</td><td>~70</td></tr> <tr><td>Mar '21</td><td>~80</td><td>~80</td><td>~85</td></tr> <tr><td>May '21</td><td>~78</td><td>~75</td><td>~75</td></tr> <tr><td>Jul '21</td><td>~75</td><td>~75</td><td>~65</td></tr> <tr><td>Sep '21</td><td>~85</td><td>~85</td><td>~85</td></tr> <tr><td>Nov '21</td><td>~88</td><td>~88</td><td>~85</td></tr> </tbody> </table>	Week	Sentiment (%)	Engagement (%)	Empathy (%)	Jan '21	~75	~70	~70	Mar '21	~80	~80	~85	May '21	~78	~75	~75	Jul '21	~75	~75	~65	Sep '21	~85	~85	~85	Nov '21	~88	~88	~85
Week	Sentiment (%)	Engagement (%)	Empathy (%)																											
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Jul '21	~75	~75	~65																											
Sep '21	~85	~85	~85																											
Nov '21	~88	~88	~85																											
5	Convo Stats	<p>Shows rep's averages for Empathy, Politeness, Talk Ratio, and Talk Speed.</p> <ul style="list-style-type: none"> <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> <p>*** 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.</p>																												
6	Behavioral Content	<p>Shows important key moments within meetings conducted in the date range. Use the Area of Improvement and Key Topic search to filter information.</p> <p><b>Area of Improvement</b> Filter by a pulldown list of improvements. For example, you can show all the key moments where empathy value was below 89%.</p> <p><b>Key Topics</b> Enter text in the Key Topic field to filter on words or phrases.</p> <p><b>Icons</b> The top two icons show sentiment and engagement, respectively.</p> <p>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.</p>																												

		<p>Key Topics (2)</p> <ul style="list-style-type: none"> <li>Identity access</li> <li>Track Passwords</li> </ul>
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

Improve

Filter by Sep 28 2021 - Dec 28 2021 Account

View selected filters

Overview Key Topics

Sorted By Highest Relevance

**Customer Objections**

- Strange
- Expensive
- Challenging
- Complex
- Cumbersome

**Customer Value Propositions**

**MEDDIC**

The first point of integration is capturing of audio data, you know typically that's integration with genesis and your ingress audio w....

0:23:153

Sales Cloud

The first point of integration is capturing of audio data, you know typically that's integration with genesis and your ingress audio w....

0:23:153

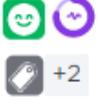
Sales Cloud

The first point of integration is capturing of audio data, you know typically that's integration with genesis and your ingress audio w....

0:23:153

Sales Cloud

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.

		<p>The first point of integration is capturing of audio data, you know typically that's integration with genesis and your ingress audio w...</p> <p>0:23-1:53</p> <p></p> <p>EQ Icons: The top two icons show EQ associated with key topics for sentiment and engagement, respectively.</p> <p>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.</p> <p>For video, comments, and share:</p> <ul style="list-style-type: none"> <li>• Click the video icon to replay the video.</li> <li>• Use the dialog balloon to add your comments.</li> <li>• Use the Share icon to share via Slack</li> </ul> <p>0:23-1:53</p>
<b>5</b>	Customer Value Propositions	
<b>6</b>	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.”

**A. Connect to your CRM**

Connect to your Salesforce account [Connect](#)

**B. Importing Customer Information**

To import information from the CRM, you must fill out each field using the same syntax as Salesforce. [See full instructions](#)

**Accounts**

Input your search criteria to find the accounts you want to add to Q-Sales from SalesForce.

Configure the earliest period to pull your accounts' data

[Import](#)

**Opportunities**

Input your search criteria to find the opportunities you want to add to Q-Sales from SalesForce.

Configure the earliest period to pull your accounts' data

<b>1</b>	Tabs	Admin Page navigation tabs.
<b>2</b>	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.
<b>3</b>	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. <ul style="list-style-type: none"> <li>• Accounts</li> <li>• Opportunities</li> <li>• Contacts</li> </ul>

		<p>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.</p> <p>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.</p> <p>More information is available by clicking the instructions link.</p>
<b>4</b>	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.

	 <b>Enable Zoom Access</b> <p><b>Zoom To Access Past Meetings (JWT)</b></p> <ul style="list-style-type: none"> <li>• Login to your companies zoom account and navigate to the zoom marketplace.</li> <li>• Download Q Sales app.</li> <li>• Open Q Sales app and paste the JWT token below.</li> </ul> <p><a href="#">See full instructions</a></p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">JWT Tokens</div> <div style="background-color: black; color: white; padding: 2px 10px; border-radius: 5px; text-decoration: none; font-weight: bold;">Update</div> <p><b>Zoom To Record Meetings (SDK)</b></p> <ul style="list-style-type: none"> <li>• Login to your companies zoom account and navigate to the zoom marketplace.</li> <li>• Download Q Sales app.</li> <li>• Open Q Sales app and paste the JWT token below.</li> </ul> <p><a href="#">See full instructions</a></p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Client id</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Client secret</div> <div style="background-color: black; color: white; padding: 2px 10px; border-radius: 5px; text-decoration: none; font-weight: bold;">Update</div> <p><b>Zoom Exclusions</b> Emails in this group will not have their zoom recordings analyzed by Q Sales.</p> <p><b>CRM Role Restrictions</b></p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">CRM Roles</div> <div style="display: flex; justify-content: space-around; align-items: center;"> <span>Additional emails to exclude</span> <input style="background-color: black; color: white; padding: 2px 10px; border-radius: 5px; text-decoration: none; font-weight: bold; margin-right: 10px;" type="button" value="Exclude"/> <span>Total (999)</span> </div>	
<b>1</b>	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.
<b>2</b>	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.

<b>3</b>	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.
<b>4</b>	CRM Role Restrictions	Use this to specify rules for: <ul style="list-style-type: none"><li>• additional emails to exclude</li><li>• emails not to exclude</li></ul>

## Communications

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

 **Import Email Conditions**

- Only emails with an external domain name are imported.
- This will not include personal emails.
- Only emails within the last 6 months will be imported.

Per user authorization ②  
 Admin user ③

---

 **Integrate Slack**

- Login to your company's zoom account and navigate to the zoom marketplace.
- Download Q Sales app.
- Open Q Sales app and paste the JWT token below.

[See full instructions](#)

<b>1</b>	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 <a href="#">Users</a> tab).
<b>2</b>	Integrate Slack	Use the Slack configuration to add a token for Slack integration.

## Company

Use this tab to identify your business.

## Identify Your Business

Select a categories and any subcategories that most closely resembles your business.

Business Category	Business Sub Category	
Select Business Category	Select Sub Category	<b>Import</b>
<input type="button" value="ERP - erp accounting"/> <input type="button" value="Security - application firewall appliances"/> <input type="button" value="Security - application firewall appliances"/> <input type="button" value="Security - identity management software"/> <input type="button" value="Differentiation and Competition - competitive landscape"/> <input type="button" value="HR - background check software"/> <input type="button" value="Security - single sign-on (sso) software"/> <input type="button" value="Security - single sign-on (sso) software"/> <input type="button" value="Differentiation and Competition - competitive landscape"/> <input type="button" value="CAD and PLM - product lifecycle management"/> <input type="button" value="Security - iot security software"/> <input type="button" value="HR - workforce management software"/> <input type="button" value="Economic buyer &amp; Budget - economic buyer"/> <input type="button" value="Negative Impact - change and cancellation"/> <input type="button" value="CAD and PLM - sketching software"/> <input type="button" value="Collaboration &amp; Productivity - video conferencing software"/> <input type="button" value="Security - application firewall appliances"/> <input type="button" value="Security - application firewall appliances"/> <input type="button" value="Sales - field sales software"/>		

## Relevant Company Website

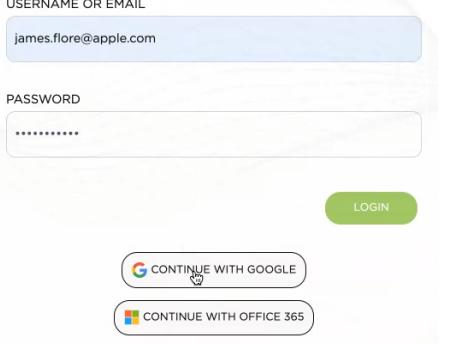
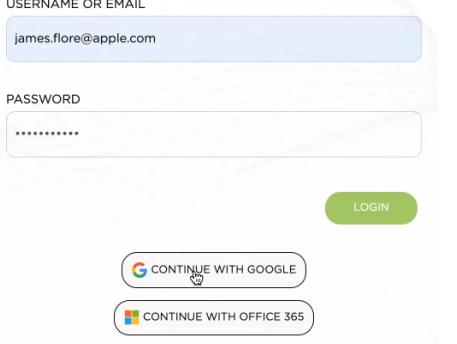
You can import at most 5 websites.

<https://www.okta.com/workforce-identity/>  
<https://www.financialforce.com/cloud-erp-software-apps/>  
<http://www.google.com>  
[www.qq.com](http://www.qq.com)

<b>1</b>	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 <a href="#">Key Phrases</a> .
<b>2</b>	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.

<p><b>Users (18)</b> <span>+ Add</span></p> <p>Name <input type="text"/> <span>Search</span></p> <table border="1"> <tbody> <tr><td>admin</td></tr> <tr><td>Alex Jones</td></tr> <tr><td>Renee Thomas</td></tr> <tr><td>Nina Turner</td></tr> <tr><td>Max Holloway</td></tr> <tr><td>Brian Williams</td></tr> <tr><td>luke davis</td></tr> <tr><td>John Chambers</td></tr> <tr><td>dylan tolley</td></tr> <tr><td>Saurabh Prasad</td></tr> <tr><td>Daniel Kiss</td></tr> <tr><td>Jhonny Bravo</td></tr> <tr><td>William Brothers</td></tr> <tr><td>thomas</td></tr> </tbody> </table>	admin	Alex Jones	Renee Thomas	Nina Turner	Max Holloway	Brian Williams	luke davis	John Chambers	dylan tolley	Saurabh Prasad	Daniel Kiss	Jhonny Bravo	William Brothers	thomas	<p><b>James Flores</b></p> <p>Login Information</p> <table> <tbody> <tr><td>Login</td><td>james.flore@apple.com</td></tr> <tr><td>Password</td><td><span>Change</span></td></tr> </tbody> </table> <p>Profile</p> <table> <tbody> <tr><td>Role</td><td><span>Edit</span></td><td>Role_admin</td></tr> <tr><td>Authorize Collaboration</td><td><span>Email</span></td><td>Not Authorized</td></tr> <tr><td></td><td><span>Slack</span></td><td>Not Authorized</td></tr> <tr><td></td><td><span>Webex</span></td><td>Not Authorized</td></tr> </tbody> </table>	Login	james.flore@apple.com	Password	<span>Change</span>	Role	<span>Edit</span>	Role_admin	Authorize Collaboration	<span>Email</span>	Not Authorized		<span>Slack</span>	Not Authorized		<span>Webex</span>	Not Authorized
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dylan tolley																															
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Daniel Kiss																															
Jhonny Bravo																															
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## Key Phrases

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

Categories <span>+ Add</span>		Decision Process Key Words <span>Actions ▾</span>
<b>^ MEDDIC</b>		Recently Added
Confusion & Objection		test
Remote Work		approve
Differentiation And Competition		approval
<b>Decision Process</b>		best decision
Reference And Case Studies		commercial discussion
Economic Buyer & Budget		contract
Negative Impact		decision
Next Steps		decision-making process
Project Success Metrics		deployment
Solution And Feature		
Pain Point		
Customer Information		
Decision Criteria		
Pricing		
Customer Agreement		
<b>1</b>	Categories	Shows categories for MEDDIC key words as well as INDUSTRY-specific key words that you have imported using Identify Your Business under the <a href="#">Company</a> tab. Use Add (+) to add categories.
<b>2</b>	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.

Select Type: <span>User Type ▾</span>		
<b>1</b>	Select User Type	<p>Two selections are available:</p> <ul style="list-style-type: none"> <li>• Employee : An employee of your company.</li> <li>• Customer : A customer involved in a deal with your company.</li> </ul> <p>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.</p> <ul style="list-style-type: none"> <li>• A green check indicates they have been removed.</li> <li>• Uncheck the checkbox to add them back to the system.</li> </ul>