



CALL AI Transcript

“Walkthrough: DSR Oct'23 releases”

Shweta Ajwani via Google Meet

Duration : 32 minutes

Sept 28, 2023

Participants

Team

Galen Li, Shweta Ajwani, Sse, Documentation, Be Ready (Walkthrough: DSR Oct'23 releases), Hansa Nataraja, Bryant Burnheimer

Other

Mriganka Sarmah, Sunita Rele, Himanshu Gond, Tanushree Sanghai

Transcript

The transcript below is generated automatically using speech-to-text technology. Accuracy may vary based on line quality, accent and domain vocabulary.

Mriganka Sarmah 00:01

Good morning. Good evening everyone. Hello. Hello, good evening. Hello, good morning. This

Shweta Ajwani 00:09

call will be recorded for quality and training purposes, then we can start whenever you're ready. We have a couple of folks on the call and we are recording it. So. Ok, cool. So I think we have

Galen Li 00:26

one ticket to talk about today, right? Yep. Uh Just step for the rest of the folks on the team.

Shweta Ajwani 00:33

Uh the dr integration that, that I mentioned on the invite. Uh There are no front end changes. So, enablement is not required for that. So, uh that won't be covered in the walkthrough today. So it will be just the uh uh alerts on for DS R that will be covered today. Yep. Yep. Yeah. So, um this feature is about slack

Galen Li 01:01

alerts on DS R engagement. And um this is something that we had built a while ago and was available um for standalone, enable us customers, but up to now, well, we

have had it off for the mind tickle customers and we've got a number of uh customers and, and prospects that we're asking about it. So we thought,

Galen Li

01:25

you know, it wouldn't take much work for us to get this out. So, um that's why we just move forward with um doing this. Um So, so the idea is that um uh users uh right, sales reps could get slack alerts when people visit their rooms and then uh you'll be able to configure uh what alerts you'd

Galen Li

01:49

like to get and uh and what channel you would like to get them. So let me go ahead and share my screen. See here.

Galen Li

02:10

All right, cool. So uh I'm sharing my screen here. Let me hide this. So the place where you would see this is as a DS R admin, you um you know, normally when you go to DS RS, you start here, you click on the settings icon and click over to integrations. Uh by default, you're looking at the

Galen Li

02:37

CRM integrations and you will see a new tab for alerts. Uh and when you click on alerts, you'll see an option to connect to Slack. And um you know, in the future, there could be other uh things where you might get alerts like teams or, or something. But for, for now, um we have Slack here, you click

Galen Li

03:02

uh connect and well, here I'm already logged into Slack. Um So I get shown this, but if you were not logged into Slack, I think it would ask you to um ask you about your workspace and the log in and all that sort of thing. But uh regardless

after you authenticate, you have to allow permissions. And after

Galen Li

03:28

you allow permissions, then we will uh get that connected. And uh so now after I hit allow and it will load up and here, now you see it is uh connected, the connect button now becomes a configure button. Um I'm actually connected to the enable us uh Slack workspace. Uh And then if I click configure, then you

Galen Li

04:09

can configure your Slack integration. And first uh the first box is where do you want to send the notifications to? And when I click on that, the first option is individuals sending notification to individuals is essentially direct messages in Slack. Uh And then after that, you see all of the uh public channels that you have uh in

Galen Li

04:38

your Slack workspace. So if I uh I'll click uh individuals here and after you choose where you want to send notifications to, you can select uh when do you want to get those notifications? And by default, everything is selected. And uh but you can, you know, if you only want to get notified when someone visits your room,

Galen Li

05:03

you can do that um or you can select everything. So let me just walk through what each of these are. So room visited um is when someone visits your DS R, uh we'll skip the second one. This is not relevant for us. And um yeah, we'll, we'll get that removed. Um Since mindtickle organizations do not have shared

Galen Li

05:26

links uh the next one is room shared. So this is when someone visits your room and then they click on that top right button in the DS R that says share this room and they end up sharing the room with their colleague. Um So that's what that notification is about. And then the last two are related to

Galen Li

05:48

that conversation drawer that slides out from the right. Um If your prospective buyer wants to ask a question, um then uh it's one of these conversation posts submitted and if when someone replies to that, then it's a reply. So um that's what these options are about and you can have the option to um send notifications to more

Galen Li

06:18

than one channel. So as an example, I'll select that I also wanted to go to this black channel. So I'm gonna go ahead and save those changes and this is something that you can configure at any time. So I can, you know, go back click configure and change this later if I wanted to. And just from the

Galen Li

06:45

customer's perspective, um what I've experienced as like a, a reason why sending these notifications to a slack channel is beneficial is maybe someone goes on a vacation or something, then the other people on the team can see notifications and follow up on, you know, questions or things that may happen in the room while their colleague is on

Galen Li

07:11

leave. Another benefit I've experienced is it kind of like gets everyone hyped up and excited about um certain deals and opportunities because they, they see that the prospective buyer is coming in. And so, uh uh especially for if there are

some sales people who are hesitant to use Ds Rs, when they see other prospective buyers jumping into

Galen Li

07:38

their colleagues Ds Rs, then they get excited about. Oh Wow, this is cool technology. I want to jump in on this too. So I think it's um kind of has a positive reinforcement loop for us to have this feature. Um Let me pause here. Any questions so far before I show you some of the actual slack notifications

Galen Li

08:01

going off. Uh Yes. And uh when we select individuals

Shweta Ajwani

08:07

uh send notifications to individuals, do we get to specify which individual? But no, this, this goes out to uh the, the room

Galen Li

08:18

owners and the collaborators of the room? OK. Uh And is there

Shweta Ajwani

08:26

are there any action items that the recipients can take on the slack front? So for example, we've integrated Google Calendar with Slack. We can just, you know, we get alerts or just a minute before the meeting is about to start and we can just go to that notification and join the meeting from Slack itself. So are there any action items that we can take from the slack front? So there are links, uh I would say deep links back into the DS R

Galen Li

08:56

but you cannot, I would say you cannot perform the actions directly from black. So I'll, I'll, I'll demo that um in a minute here. Yeah, but yeah, yeah, just one more question. Um This is so the the integration

Shweta Ajwani

09:16

that you just showed that's for the enablers uh workspace. So uh is there a way to stop these notifications? What do we need to do if you don't want the notifications to go out anymore? Mhm Yeah. So if I wanna disconnect it for everyone, I can click

Galen Li

09:36

disconnect and confirm here disconnect from slack. But this can be controlled at a room level as well. Ok. Yeah. So let, let me show that next actually. So if I go into digital sales rooms, I'm gonna go create a room real quick um documentation M for deal. And let's just go ahead and create this for uh DS

Galen Li

10:13

R and let's select a room template here. Yeah, let's just grab this. All right. So I have my room now when I go to publish, um I can select my notifications, I can select uh post the slack when viewed. And if you have a slack connected, this should be on by default. But I think it's because I

Galen Li

10:41

selected a template, the template didn't have this on. That's why I was deselected. But you can see here that I can control whether or not I want to get notifications and I chose that I did. And so if I didn't want to get these, I, I can turn this off, um, and I can turn off emails if

Galen Li

10:58

I wanted to as well. So that's where, um, it can be controlled

at a room level and it can be controlled at a template level too. Ok. So, uh that would be different from, uh, disabling

Shweta Ajwani 11:13

notifications uh, at the individual level, right? Um, well,

Galen Li 11:21

tell me more at the, what you mean by the individual level or notifications for a room. Um, is, is my voice coming

Shweta Ajwani 11:32

through. Uh Yeah. Mhm OK. So what I meant was uh when we say that we disable notifications at the room level, we are disabling it for the room owner and the collaborators together collectively. Uh So if we enable the notifications for a room and the room owner wants to disable it, but they want the collaborators to continue

Shweta Ajwani 11:58

receiving it. Is that a possibility or that's not a possibility? Um No, the the room owner

Galen Li 12:07

always gets the notifications and if the room owner changes the settings, then the room owner is also affected as well as the collaborators that gets. So if I was this the one or was it a different one? Oh, that's, oh I, I see, I forgot it because I selected the template to change this um for our

Galen Li 12:36

documentation demo. So if I go back here and um add collaborators, all right, let's just add Andre here. So if I don't want them to get um notifications, then I would just show profile in room. But um if the room owner doesn't wanna

get notifications, then the only way to do that is uh would be at the

Galen Li

13:09

room level. Um but this affects the collaborators that receive notifications. Got it. So when I ask this question, I'm thinking about uh

Shweta Ajwani

13:20

MS teams really, uh you can just go to that integration and slack and then just enter a command stop notifications and then you know, that individual would stop receiving the notifications but the others would continue to do so. So this is really where this came from. Got it. Yeah, I'm not. Um I don't know about a way

Galen Li

13:42

that we can do that right now. Given one basic question here,

Mriganka Sarmah

13:49

like, so do we need to create the select channels before we uh enable this feature from DS R? Is it or because I, I could see that like we don't want to send individual uh stakeholders being added to the from a select channel perspective, right? So yeah, what I saw is that it's a, it's a selection like

Mriganka Sarmah

14:14

group of people there or is it something that we need to like? As I admit, I should know like OK, these are the people who needs to be doing the select channel and then enable that? How does it mean? I'm sorry if I'm getting it wrong. Um Yeah, so when you configure it,

Galen Li

14:33

um sorry, I'm waiting for the get back to the uh settings integration page all right. So let's go over here and over here. So this is basically looking through all of the existing ans um that we have. And so, I mean, you, you cannot create a slack channel from here. You can only select from existing channels. Now,

Galen Li

15:07

if someone um these are all um public channels and so if someone joins the channel uh later, then they can still receive uh those notifications. So it's just whoever has access to those channels. Um I'm not sure if that answers your question. Yes. Yes, I get it. Thank you. So just building up on that. If uh once the

Shweta Ajwani

15:40

configuration is set up and we add another channel to slack, we create a new channel. Slack. Do we need to configure it again? Yeah. So why don't I walk

Galen Li

15:52

through it and maybe that will answer the question. So I got uh I'm gonna go to the, the DS R here. Um So I'm in an incognito window. So now I'm, I'm coming in as a room visitor, right? Um Then um So here I'm visiting the room and um I didn't request that I didn't require email to

Galen Li

16:19

view. But if I try to enter something in conversation, um it will prompt me for my email address because it needs to know whose name to put there when you're putting in a message and so I can write it. How much does this cost? Let me pull up my slack real quick. So here's my slack. Um So

Galen Li

16:45

when I hit post, what was the post name?

Galen Li

16:58

Ok. I think I'm, am I on do not disturb mode? I don't, yeah, I'm not sure how to do this, but yeah, uh I got these two notifications because I set it up for two channels. Right. Well, the, the first I did was a direct message and so this is the direct message to the app. And so

Galen Li

17:28

um there's this um that says, how much does this cost? And this goes to the room owner uh and the collaborator and they can click on this link to reply and let me show you what that does. So if I click reply, it will be a deep link into the, the DS R. So it will go into

Galen Li

17:53

the room overview page and it should slide out that conversation drawer as if I had already had it opened and click on the reply button. Um So see that just went out immediately and this is already in reply mode with the cursor here to type in my reply to this question. And remember I had set up the

Galen Li

18:18

integration to send a direct message to the individual and also to this channel Galan Slack. And so this is um where it posts as well. And here there're I'm not the only one in this channel. There are these other people in this channel. Um And so if I wanted to uh have the messages go somewhere else. I

Galen Li

18:43

can go create a new channel. So I don't even remember how

to do this. Create channel uh Alan New P hello, right? And I'll hit next and treat that. And so if I go back over here to integrations, alerts configure uh but this is the channel I just created it. Fill up here. Yeah. Got it. Yeah. And

Galen Li

19:28

then uh so that, that was one example I gave um you know, if I reply and you can see how that shows up here, you know, uh it will post the whole thread so you don't have to scroll back up to find it. And um you know, same thing here and remember that uh there was another one

Galen Li

19:54

where it was uh if someone visits your room, but you notice this came later, this came after I posted this message. And um so I think the way we have it is that um it posts, I believe three minutes after you visit the room. So once you enter the room, we wait three minutes before we send this

Galen Li

20:19

message. This is by the way, the same as um we wait three minutes before we send the email notification. I think we also wait three minutes before uh we post the to the CRM. And the reason for this is because this has a view stats button and we didn't want to send the notification immediately when you visit

Galen Li

20:41

the room because this takes you to the room overview page and we don't want you clicking on it going there and seeing that you haven't done anything in the room. So that's why we have that three minute delay on purpose. Um And uh we do uh the uh contact enrichment. So that's why even though I just typed

Galen Li

21:01

in my email address, it like tried to grab my first name, last name, job title as well as my uh photo. So, I mean, it doesn't always get all this information, but if it does, then it will surface this in slack. And then again, uh can you please elaborate a bit on the reason? The three minute delay

Shweta Ajwani

21:27

reason you said that uh we don't want, we want to wait until the visitor has spent quite a bit of time on the room. Is that what we're saying? Right. So let's say that um Yeah,

Galen Li

21:43

oh post this and chat and you guys can come in as well. So the thing is if you click that link and you visit this DS R, the problem with us sending this notification immediately is, you know, as a salesperson, you see this pop up, you get excited, you click view stats, but if they just got in,

Galen Li

22:08

they wouldn't have had time to look at any of the content in the room. So that's why we wanted to have a three minute delay before we send the notification. So that when you click view stats you'll have some analytics to actually look at. Got it. Mhm Cool. And then the last uh one that we do is

Galen Li

22:34

um let's see, just put in your email here. So when I share that it also posts here. So I shared the room with you um and there's a link to view room details. So those are the four different uh notifications we post to slack. Mm mhm There are some a that I can talk through but any questions

Galen Li

23:07

so far. Yeah, I have one question on the Slack

Shweta Ajwani

23:12

notification that comes up. Uh So we do have a title for the notification and shared room for documentation demo with Slack. Uh And then it's just the name and the uh the email id of the person that was shared with. So could there be something like it was shared with this person or you know, just to

Shweta Ajwani

23:33

give it a little bit of more context? Mm Just just something that I'm thinking about. Yeah, tell me more like

Galen Li

23:46

um like it could just be, it could just be shared with and then you know the list of

Shweta Ajwani

23:52

list of people it was shared with. Just the just those missing was shared with so that you know, it gives a little bit of context and it's clear like you just look at it and you know that it was shared with these people now it's just, yeah. So in this case, I shared it with you. But

Galen Li

24:10

if I had shared it with more people, then it would list out all the people I shared it with. So it says Galy shared room for

Shweta Ajwani

24:19

documentation demo with. Uh it could probably just talk there or is it just a little bit unclear of what happens? What, what, why the name is there? No, no sweta I think the uh the name of the DS R is like

Mriganka Sarmah

24:37

uh room for documentation, right? Being shared itself says that OK, that room like particular room maybe because there is no differentiation there. It's just a sentence there looks like like like, but I think on a real time context, it will be, I think it will make sense that shared is there like has already shared this with this

Mriganka Sarmah 25:00

many people but I could, I could see that. Yeah. Yeah, just me. So yeah, maybe it would

Shweta Ajwani 25:09

be more clear

Galen Li 25:11

if it were like a room name that made more sense um Than when I share it with. Uh That's just on there. Yeah. So it, it's just it tells you who shared it and the name of the room and then this is the person they shared it with and then if you shared it with multiple people, right?

Galen Li 25:40

Because you can, you can add multiple people here, then you'll see like this sort of information for each one. Yeah. So, so my point was around the word, the word

Shweta Ajwani 25:53

width is missing. So Gale shared the room with and then the list would appear. This is that missing word? I see. So you want to see the

Galen Li 26:03

width over here? Um What would it be kind of redundant though with what we were showing here? Yeah, like I said,

it's probably just me, it, uh, Megan understood. It was

Shweta Ajwani

26:16

probably just me. Ok. Well, that's um, yeah, that's helpful feedback we can see.

Galen Li

26:23

Um, yeah, how, um, what, what else we hear? Um Cool. There are a couple caveats I wanted to bring up and um so that this is something we have uh documented and enable us so I can point to it here. OK. So yeah, we have it in the troubleshooting section. So here, here's a big one. If you've

Galen Li

26:56

chosen to send notifications to individuals where it says direct message, remember that was the first option. You need to make sure your mind tickle account email matches your Slack account email because that's how we're doing the connection. And so if your mind tickle account email doesn't match your Slack account email, we don't know where to send you

Galen Li

27:19

that direct message. So, so that's, that's um the reason for that. Um for collaborators, they can get these slack notifications, but only if they're marked as getting emails. Like I think I showed uh earlier that there was a way that you can um only surface the profile without getting emails. And if you do that, you're not gonna

Galen Li

27:46

get the Slack notifications. All right. That's over here. Right. So here Andre will not get the slack notifications unless I select this. Um, and then, uh, yeah. Oh, I think that, oh, and this I already mentioned, um, you need to wait three

minutes. I think it's three, not five, before you would get the notification. Ok. And the

Galen Li 28:19

other thing I wanted to bring up is we are in, uh, if you go to Slack and look at their app directory, we are um listed there. So in case you need to link to this, um you know, it, it goes to this page. So I will share these two links with you. Uh the link to the

Galen Li 28:41

Slack App directory listing as well as the Enable us help article. Yeah, that'd be helpful.

Shweta Ajwani 28:51

Cool.

Galen Li 28:53

Um I guess that's it. Any other questions? Um The the new alerts tab, it's not behind a feature

Shweta Ajwani 29:03

flag, correct? So anyone who has the sa would see it. Um Good question. So it is behind

Galen Li 29:10

a feature flag and we were going to uh wait until the monthly mind tickle release. I think it's what is it October 17th or 19th that we were going to turn it on at that point. Ok. Um But uh whenever that date is October 17th or 19th, it will be a G A release. So we will turn

Galen Li 29:33

it on for all my tickle organizations and um both existing

organizations and any new organization will have the alerts tab by default. Ok. Mhm. Yeah. Um, yeah, I think those were all

Shweta Ajwani

29:52

my questions. Uh, at this point I don't have any problem when I try out the feature I'll have more and then I'll just reach out to you. Ok. Anyone else on the call has any questions for Gillen? No, I'm good. Yeah, cool. Um, yeah, I guess, uh, on that point if

Galen Li

30:13

you wanted to try it out yourself, just let me know what environment to turn it on for. And I guess you would need to connect, uh, a Slack account and I'm not sure if we would need to talk to our Slack administrator to do that. It's just, uh, I can connect it to enable a slack because I'm an admin there. Ok. I, I think I'd be able to do it for the mindtickle workspace

Shweta Ajwani

30:38

that I'm using. Uh, but I'll still try and if I face any blockers I'll let you know. Ok. Cool. Sounds good. Uh,

Galen Li

30:47

but, but I see that you showcase this on crawl, not

Shweta Ajwani

30:51

staging. So that's where I can try it as well. Right. Uh, yes. Uh, what, we're testing it on here.

Galen Li

30:58

So, um, yeah, I guess, you know, part of that testing may be turning it off and on. Um, but, uh, I, if it, if you need it to be

on just, uh, and it's not on, just let us know and we'll, and figure that. Yeah. Yeah, I think, I think if there's nothing else from you again and we can call

Shweta Ajwani

31:19

it a meeting. Ok. Well, thanks everyone. Thanks for, thanks for your time. Thanks, team for joining. Bye.
