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April 2022 Updates
1 message

Megan Hundley <mhundley@frannet.com>   Fri, Apr 1, 2022 at 11:25 AM
To: Megan Hundley <mhundley@frannet.com>
Bcc: salesaccelerator@frannet.com

Hello Everyone,

These last couple of weeks have brought a lot of Sales Accelerator questions so I wanted to send an update email to keep everyone in the loop.

As a reminder, I keep the SA Guide and FRED Forum updated as things happen. Please continue to check in with these resources to stay current.

Important Highlights and Reminders:

- Note the status criteria has been adjusted to remove Prospect as an option. As you heard Will mention during a company call, this status will no longer be included in reporting or by the SA because of the way it is being used. If your record shows the status Prospect, it will not trigger the SA.
  - There was some issue with the tool not triggering after modifying the record to a MQL status. That is also resolved.
- If you review the Calendar Management section of the SA Guide, you will see we've added the option to write in "introduction call" alongside "qualifying call" in your calendar events. The tool will recognize both and see the call is scheduled. Also, a good reminder to make sure your calendar is up to date regarding blocking times off.
- There have been two new schedule options added for you to select in your SA Dashboard.
  - M-F 8am-12pm
  - M-F 12pm-4pm
- The Lumin team informed me that it doesn't look like anyone has taken advantage of the customization available to the script in the SA Dashboard. You can modify the second line of text sent by logging into your Dashboard.

Recent Tickets/Pending Updates:

- If you experienced the SA reaching out to clients not in your SKY database, that issue was resolved the week of 3/21. This was due to an update in Lumin's software that accidentally removed a condition we had in place for the calendar. If you have any questions or concerns about this, please let me know.
- I was made aware last week that there is additional work that needs to be done with the manual trigger option. In the record, we had the ability to trigger the SA by selecting checkboxes (main use was to trigger after adding a mobile number to the record). This is temporarily suspended and will be fully functional by 4/8.
  - The connection to the FN Recruiter tool will also be functioning on 4/8. I will send a short video training that day to make sure everyone understands how to handle these two use cases.
- I am working with Lumin support to add a control option for LinkedIn leads. Soon, you will be able to select CTR or Automatic in the SA Dashboard for any record with a LinkedIn source.

Thank you and please reach out if you need to review any of the above.

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