Sales Processes & Tech Stack

Guides for sales processes such as SQL approval, handoffs, rules of engagement, etc.

- SQL Approval Process
- 6sense Sales Alerts
- Who to contact for all the things!

SQL Approval Process

Appointments Set (BDR)

□□ Set appointments as usual. Events in SFDC look like this:

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Requirements/ Key Activities

For a deal to be considered an SQL, all of the following must be completed:

[ ] Discovery call booked (on the calendar, agreed to by the prospect)

[ ] SQL criteria has been met & validated

[ ] Lead notes completed and handed off to the AE

SQL Criteria

Criteria	**Inbound**	**Outbound**
Firmographics: # of Employees	50 and above	100 – 3500 employees
Firmographics: Location of HQ	U.S./Canada – or approved by manager	U.S./Canada
Authority to evaluate doc. Management systems	Checkbox	Checkbox
Need – Goals/Pain with document management & workflows	Checkbox	Checkbox

Tech: Current doc. Management & cloud storage used today	Image not found Checkbox (	Image not found Checkbox (
Timeframe to evaluate doc. Management systems	Within 9 months	<Not Needed>
Willing to do move to next step: first meeting with AE	Image not found Checkbox (	Image not found Checkbox (

SQL Approval

The AE will be responsible for confirming SQL criteria has been met by the BDR. **This is separate from opportunity creation criteria;** it may be the case that an SQL is approved but an opportunity is not created by the AE.

- For example, they are evaluating vendors, but their budget has changed and timeline has been pushed out.

****The AE will have 48 hours from the appointment held date to approve or reject an SQL.**

This will be done by dispositioning the event AND the associated lead under "Discovery Call Results"**

- Held - Qualified: Approved SQL
- Held - Disqualified: Did not meet SQL criteria
- Not Held - Rescheduled: In Progress (AE will disposition the SQL after meeting held)
    - Please create a new event for the AE to approve
- Not Held - No Show: BDR is responsible for rescheduling

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BDR Tracking

> Sales Leads & SQL Dashboard

- Appointments to be decisioned: appointments set with no discovery call results

- Approved SQLs this month
- Appointments Not Held

FAQs

How Do I Contest An SQL Decision?

- Connect with your AE first to get context on the decision. If you believe you have followed all criteria, please send your SQL notes to Ryan or Kaitlin to review!

How Do I Get An SQL Approved By My AE?

- If it has been over 48 hours from the appointment held, first check in with your AE to remind them with a link to the event. If it has been an additional 24 hours from reminding the AE and they still have not updated the event or communicated a reschedule to you, escalate to Ryan or Kaitlin.

I didn't qualify the lead, but I did set the appointment. Do I get SQL credit?

- You will only get SQL credit with a qualified lead. BUT you can attempt to gather some qualification info. over email or a phone call prior to the appointment and research the lead on Zoominfo, LinkedIn, etc. to gather some qualification details.

If you were still not able to gather any qualification information, you will not get credit for the SQL. However, any potential BDR credit regarding opportunity creation or closed won value will still be possible!

How can I get SQL credit for outbound, re-engage, or dead opportunities?

- Create a lead, assign the appointment, and have your AE approve or reject as they normally would </aside>

6sense Sales Alerts

[6sense Reference Guide for Sellers]

Who to contact for all the things!

This is information for how to access certain services or software

Apollo

Please send a message in the #salesforce_support Slack channel for access or help with this.

AppInsights

If you need access to AppInsights, please submit a ticket by going to ithelp.efilecabinet.com or emailing ithelp@efilecabinet.com

Avalara

Please send a message in the #salesforce_support Slack channel for access or help with this.

Azure AD / Microsoft

We use Azure AD for our main directory. Every employee should have an account in Azure AD. These Microsoft credentials can be used to login to many services here at eFileCabinet.

If you need a password reset or anything changed with your account, please email ithelp@efilecabinet.com or submit a ticket at ithelp.efilecabinet.com

Azure DevOps

If you need access to Azure DevOps (https://dev.azure.com/eFileCabinet), please email ithelp@efilecabinet.com or submit a ticket at ithelp.efilecabinet.com
Your ticket will be routed to our CloudOps team. In your ticket please specify what you need

access to any why.

Billing / Credit Cards

For company credit cards and sending in expense reimbursement requests please email expenses@efilecabinet.com
Invoices or bills can go to accountspayable@efilecabinet.com

BookStack (internal.efilecabinet.com)

If you need to make changes to or need help with this site (BookStack) you can submit a ticket by going to ithelp.efilecabinet.com or emailing ithelp@efilecabinet.com

Chili Piper

Please send a message in the #salesforce_support Slack channel for access or help with this.

Computer software or hardware

IT sets up the computer with basic software and controls the software available in "Company Portal."
For help with your computer or software you can submit a ticket by going to ithelp.efilecabinet.com or emailing ithelp@efilecabinet.com

Gong

Send a message in the #salesforce_support Slack channel to let the team know you need access to Gong.

Google / Gmail

If you need to make changes to or need help with Google or Gmail you can submit a ticket by going to ithelp.efilecabinet.com or emailing ithelp@efilecabinet.com

Lastpass

If you need to make changes to or need help with Lastpass you can submit a ticket by going to ithelp.efilecabinet.com or emailing ithelp@efilecabinet.com

Marketo

Please contact Mirella.

For help with the Marketo integration please send a message in the #salesforce_support Slack channel.

Office 365 Desktop

Everyone here at eFileCabinet has access to Office 365 online. To access it, please sign on to https://www.office.com/

Once you are logged into office.com you can create new Word, Excel, or PowerPoint documents. Here are detailed instructions for doing this.

Once you have created your document, you can store it in Rubex and edit it using the Microsoft Office Addin for Rubex.

Requesting Microsoft Office Desktop Apps

If your position requires you to have Office Desktop Apps, you can request a license from IT by following this procedure:

- Submit a ticket at https://ithelp.efilecabinet.com
  - In your ticket, please set the subject as “Request for Microsoft Office Desktop Apps”
  - In the body of the ticket please explain the task that you need to perform in the desktop app that cannot be performed in the online version.
- Once we get manager approval, we will submit the request for approval.
- If your request is approved, we will activate your license and you can download the software by logging into office.com with your existing account.

Outreach

Please send a message in the #salesforce_support Slack channel for access or help with this.

OwnBackup

Please send a message in the #salesforce_support Slack channel for access or help with this.

Phone System / Jive

If you need to make changes to or need help with the phone system you can submit a ticket by going to ithelp.efilecabinet.com or emailing ithelp@efilecabinet.com

Rubex

If you need to make changes to or need help with your personal Rubex account you can submit a ticket by going to ithelp.efilecabinet.com or emailing ithelp@efilecabinet.com

If you need to make changes to or need help with corporate Rubex account, please contact People & Places by emailing humanresources@efilecabinet.com

Salesforce

Please note that Salesforce is logged in using your Azure AD (Microsoft) credentials. If you need help with that password you can contact IT to give you a temp password by submitting a ticket at ithelp.efilecabinet.com or emailing ithelp@efilecabinet.com.

For other issues with Salesforce including CPQ and billing, send a message to the #salesforce_support Slack channel to receive support.

Security

If you have a question in regards to security please email security@efilecabinet.com. If you are reporting a phishing email or smishing text, please include a screenshot.

Slack

IT admins Slack. If you need to make changes with Slack or need help with Slack you can submit a ticket by going to ithelp.efilecabinet.com or emailing ithelp@efilecabinet.com

TalentLMS (training.efilecabinet.com)

Our internal training is done using TalentLMS.

If you need to make changes to or need help with TalentLMS you can submit a ticket by going to ithelp.efilecabinet.com or emailing ithelp@efilecabinet.com

Totango

Please contact Mike Edlefsen.

For help with the Marketo integration please send a message in the #salesforce_support Slack channel.

Zoom

If you need to make changes to or need help with the Zoom you can submit a ticket by going to ithelp.efilecabinet.com or emailing ithelp@efilecabinet.com

ZoomInfo

Please send a message in the #salesforce_support Slack channel for access or help with this.