

## Playbooks

### KEY BENEFITS

- Maximize funnel conversion with customized Plays for different campaigns, segments or products
- Leverage predictive tools to reduce wasted effort and increase effectiveness

### KEY FEATURES

- **Sales strategies** - optimize sales strategy with customizable Plays that guide reps
- **Flexible** - easy-to-install browser extension that follows reps across the web
- **Automatic data capture** - sales activity automatically recorded in Salesforce
- **Integrated communications** - single-click dialing and emailing, pre-recorded voicemails, cue cards and managed email templates
- **Account-based selling** - research, prospect, contact and connect with targeted accounts

Predictive Playbooks is an AI-powered cadence-based sales application for strategic sales teams to grow pipeline by 30% or more. Playbooks guides reps with pre-set or custom cadence strategies, called Plays, through their engagement with customers and enables greater efficiency and effectiveness by delivering AI insights on who to sell to and how and when to engage.

Reps can personalize their communications with the help of intelligent insights displayed inside their workflows from a seamless integration with third-party data sources, like LinkedIn's Sales Navigation Application Platform.

Playbooks guides reps with cue cards and email templates, keeps reps motivated with leaderboards that track rep achievement, and automatically syncs all sales activity and data back to the CRM.

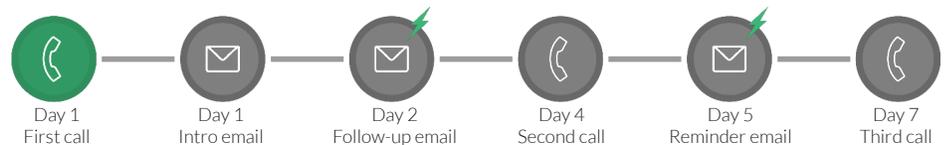


Figure 1: Example of a customized Play spanning several days.

### Plays: Customized Sales Engagement Strategies

Playbooks allows sales organizations and teams to follow their specific sales motions with customizable Plays, or workflows, for different teams, market segments, product lines and so on. Customized Plays prescribe the next best action to take to engage a prospect and help enforce best practices.

### Integrated Communications

Playbooks provides integrated communication tools for emailing and dialing. Reps can save time with single-click-dialing from the CRM, or they can call and email directly from Playbooks. In addition, Playbooks serves up cue cards to guide reps in their calls and email templates with merge fields to help reps personalize their outreach. All sales activities are automatically captured and synced back to the CRM.

### Artificial Intelligence: Predictive Contacting

Playbooks not only guides reps to the most promising leads and accounts, but it also prescribes which contact method is most effective with Multi Phone and Email Support. Reps now know before ever making a call or sending an email if they have reliable and accurate contact data - removing the guesswork from contacting prospects.

## Sales Tools Wherever The Rep Needs Them

Playbooks follows reps across the web, giving them immediate access to critical sales tools wherever they are browsing. Playbooks serves as a critical bridge between the CRM and the rest of the systems a rep uses on a daily basis to sell. When reps are prospecting, they can call up the Playbooks extension to update information in the CRM and then immediately engage their new contact.

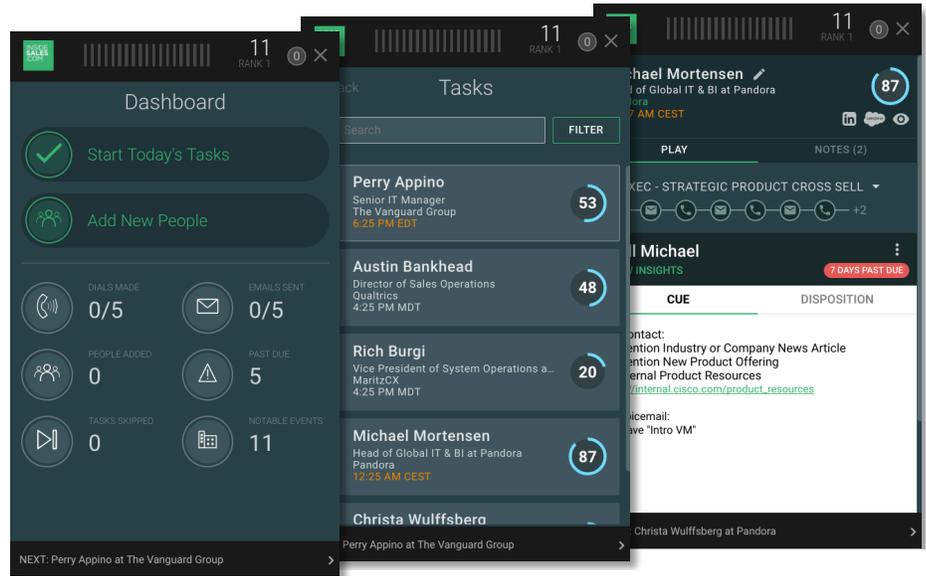


Figure 2: Example of the Playbooks Chrome extension panel

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### Insights

Reps get in-depth information on the accounts and contacts they are engaging so they can quickly personalize their pitch.

### Email Tracking

Email opens and link clicks are all tracked and reps are notified in real-time to keep them constantly connected to their prospects.

### Email Templates

Managers can enforce standardized email templates that save reps time but allow them to personalize each message before sending.

### CRM Sync

All sales activities and record updates are automatically synced to the CRM so reps never lose track of a prospect and managers get full visibility into sales activities.

### Browser Extension

Reps can continue to sell no matter where they are on the web with the Playbooks extension directly integrated in the browser.

### Rep Dashboard

Reps get an overview of all scheduled activities and next plays to guide them to the most efficient actions each day.

### LocalPresence

When reps dial from Playbooks, prospects see local numbers, increasing contact rates, and calls back to that number are routed back to the right rep.

### Reports

Playbooks works directly with the CRM to provide native, powerful sales reporting.

### Voicemail Drop

Reps save time by pre-recording voice messages and leaving them with a single click.

### Appointment Scheduling

Reps improve productivity by scheduling appointments directly from the Playbooks panel.