

Warmly,

Strategy: Real-Time Alerts from *Warmly*,

Your Fast Track to More Warm-Bound Meetings and Pipeline

Are you new to real-time alerts?

Here's why top-performing teams use them daily:

- **Catch buyers in the moment** - Engage leads *while they're still on your site*
- **Turn intent into action** - Prioritize visitors who are most likely to convert
- **Stay human in a world of automation** - Add a personal touch at *exactly the right time*

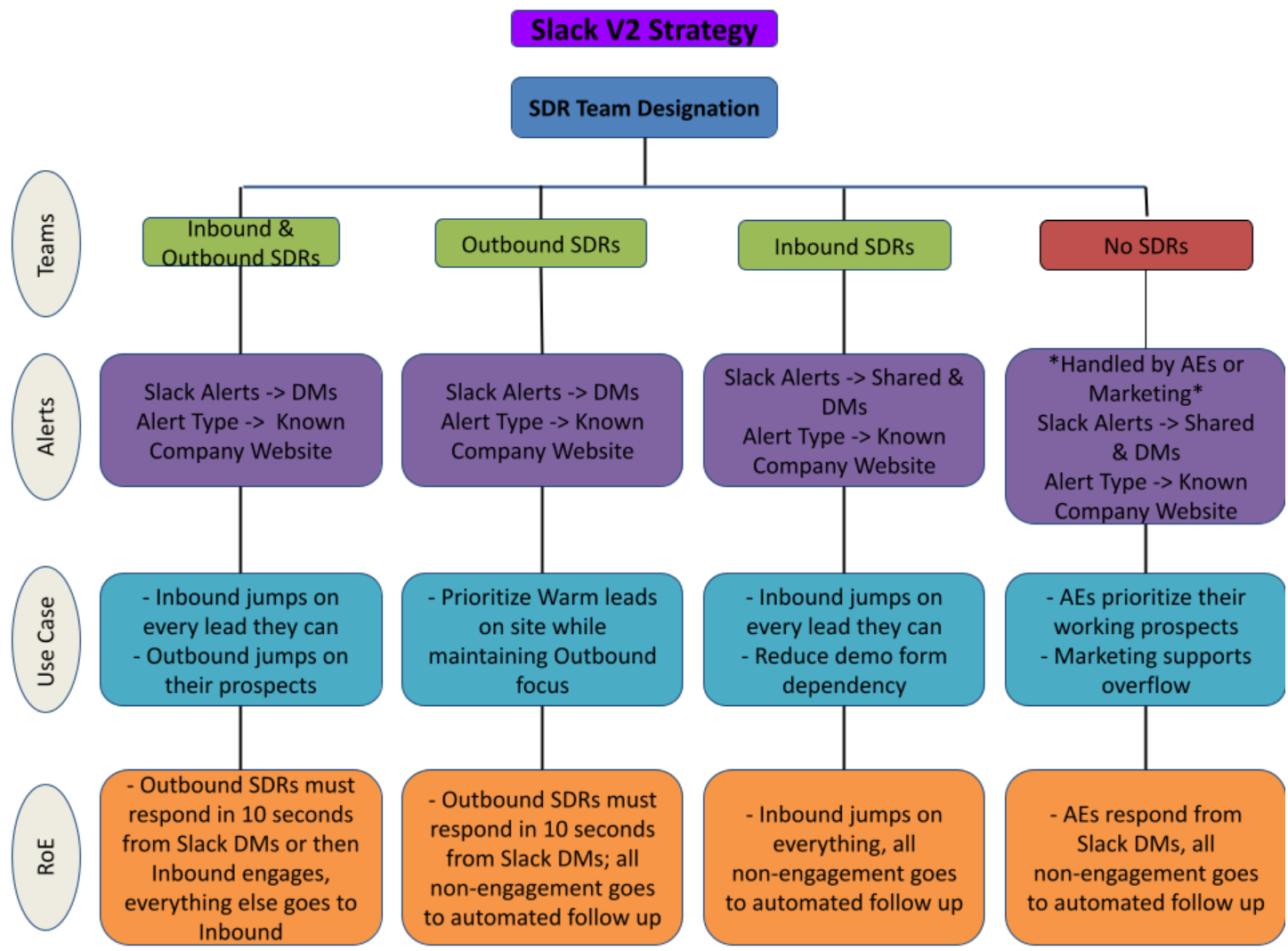
4 Principles for Success

1. **Goldilocks your alerts:** sending about ~15 Slack notifications/day per rep makes it exciting/ROI positive for reps without drowning them in too many missed alerts. Not too many, not too few.
2. **Build accountability** - ensure a manager is present in every Warmbound Slack/Teams channel. Discuss with SDRs what is expected for them to action these alerts.
3. **Leadership visibility** - get buy-in from management by adding them to a cherry-picked channel of hot leads so they can see the power of working the alerts.
4. **Iterate to ROI** - Improve timing, targeting, and messaging + tweaking your thresholds for alerts every week for at least the first 8 weeks to figure out what works for your business.

Strategies to Choose from:

Strategy	Description	Pros	Cons
All Alerts: <u>Real-time</u> vs <u>EOD</u>	Expect SDRs to live chat with prospects throughout business hours or ask them to work the leads async at the End Of Day	<u>Real-time:</u> High success rate Roll out the red carpet to prospects <u>EOD:</u> Full focus on the leads without distractions	<u>Real-time:</u> Requires a human to be on-call all the time Can be distracting <u>EOD:</u> Missed opportunities to connect with hot leads
Greenfield Alerts: <u>Round-Robined</u> vs <u>Free-for-All</u>	For new leads in your ICP that visit your website but don't exist your CRM yet, round-robin them to your sellers / tag them or send them to a group channel and first-come-first-serve Warm Call the lead	<u>Round-Robined:</u> Clear fairness You can "@" message a particular seller to chase <u>Free-for-All:</u> Faster real-time engagement with leads	<u>Round-Robined:</u> That seller might not be available for a real-time engagement <u>Free-for-All:</u> Reward reps who are just waiting for leads
Owned Alerts: <u>1:1</u> vs <u>Group Alerts</u>	For known leads showing intent, the alert to a rep (with their manager in the channel) or send them to a group channel and "@" mention the rep while allowing others to jump in if the rep doesn't action	<u>1:1:</u> Less noise for sellers Manager can have more oversight on how many leads have been actioned <u>Group Alerts:</u> Speed to lead	<u>1:1:</u> No group pressure for accountability No back-up system if the seller is busy <u>Group Alerts:</u> Lack of accountability
Inbound Alerts: <u>On</u> vs <u>Off</u>	Allow a filtered set of visiting website visitors to proactively chat inbound to your website to engage with your team	<u>On:</u> - More booked meetings <u>Off:</u> - Reduced noise for reps	<u>On:</u> - Requires a human to be on-call <u>Off:</u> - Reduced speed to lead

Strategy selection depends on what your team is like.



Want help getting started? Your CSMs are here to walk you through it step-by-step.
Let's get your team booking more meetings - faster!

Getting Started

HOW TO WARMBOUND REAL-TIME ALERTS IN 6 STEPS:

1. Quick Setup A: Send each SDR their first hot leads

Create a public Slack channel called `#warmbound-firstname` for each SDR:

- What to send: Leads (contacts owned by the rep)
- Suggested Heat Score: Hot
 - Filter: Pricing Page visitors OR
 - Filter: Competitor Compare Page visitors OR
 - Filter: Completed Form Fill
- If you're sending too many messages/day. Add: a filter >5 seconds on the site
- Tips: Add managers for visibility

2. Quick Setup B: Get alerted to inbound conversations

Create a group Slack channel called `#warmly-inbound` for all teammates who might reply to the inbound chat:

- What to send: Leads (contacts owned by the rep)
- Suggested Filters
 - Filter: Owned Accounts Only
 - Use AI Chat or a chat workflow to limit the number of chats that your reps get

Channel Name	Alert Trigger	Audience	Notification Strategy
Active Deals on Contract	Lands on a page	AE	@ Mentions
Active Deals on Site	Lands on a page	AE / SDR	@ Mentions
Competitors	Lands on a page	SDR	@ Mentions
Form Fill	Fills out a form	SDR	@ Mentions
Pricing Page	Lands on a page	SDR	@ Mentions
Closed Lost Deals	Lands on a page	SDR	@ Mentions
All Page Visits	After full identification completes	SDR	Mute Channel

Key Tip: Ensure Reps turn on
"@mentions"

 Get Notifications for @ Mentions 



All messages
Get notifications for all messages

✓ @ Mentions
Get notifications for @mentions, @here and @channel only

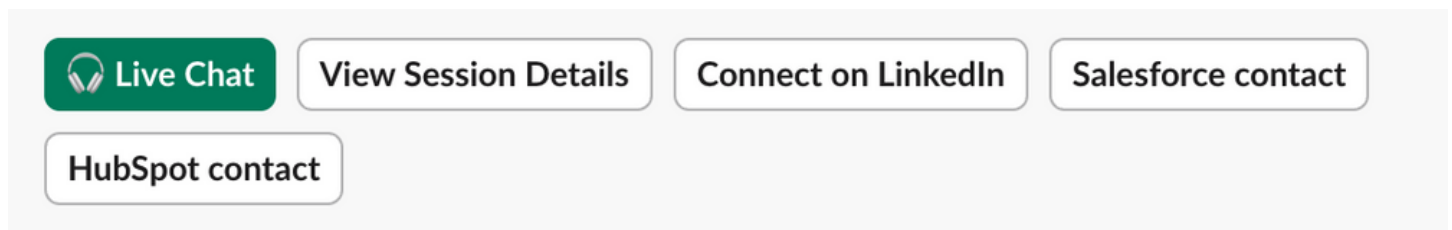
Off
You won't get notifications

Mute channel
Prevent this channel from bolding for unread messages and only receive a badge if you're mentioned

More notification options

3. Start engaging leads

- Monitor in Slack #warmbound-firstname for lead alerts
- Click “ Live Chat” within **10 seconds** of the notification (ideal = under 5 seconds!)



- In Warmly personalize your message: eg. “Saw you checking out our Pricing page - any questions I can help with?”
- If no response after 60 seconds:
 1. DM on LinkedIn: “Hey [Name], saw you on our site - thought I’d say hi here too.”
 2. Follow up via email with the same context
- **Bonus:** Monitor the UTM link clicks so you can adjust with more personalization: “[Name], noticed you clicked through my email - happy to see you live on the site!”

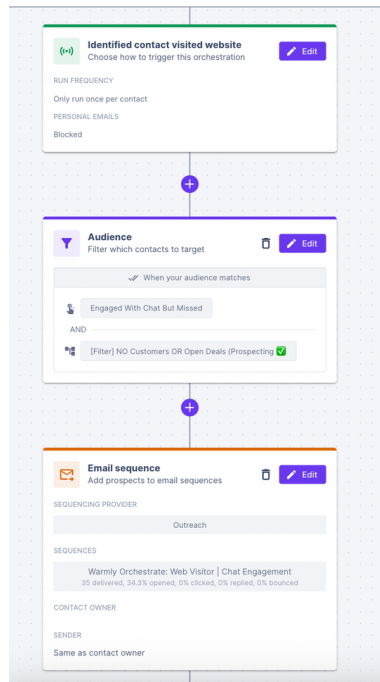
4. Coach & Optimize Every Week for 8 Weeks

- Coach reps how to respond live
- Share what to do when you miss the chat
- New rep? Train New Reps with a 15-min “Slack Alerts 101” session
- Pro-Tip: Build a Feedback Loop in Slack:
 -  = alert needs fixing (wrong person, irrelevant)
 -  = rep attempted engagement (yay accountability!)

5. Never Miss a Lead - Automate Follow-Ups to Missed Chats

- Connect to Orchestrator
- Every missed chat → send them to an email followup sequence and LinkedIn sequence
- Why? No warm lead left behind = consistent meetings booked

Prospect Engaged w/ Chatbot But Missed



6. Caution: Bad CRM Data = Bad Alerting

- Be sure to sync the **CRM Contact Owner** field to alert routing
- Weekly: check owner assignments in CRM → aim for **<10% misattribution** otherwise reps will get alerts for the wrong leads not in their territory
- Quality alerts = quality engagement
- [Hubspot Integration Page](#)
- [Salesforce Integration Page](#)

TOP 3 KPIS TO TRACK SUCCESS:

1. 100% rep adoption on Warm-Bound channels
 2. Average response time < 10 seconds to 75% of alerts
 3. 95% of missed inbound chats are followed up
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Advanced Strategies

Form Abandonment

If an inbound lead requests a demo but does not select a day and time to meet with a sales rep then instruct your SDRs to jump on the Warm Calls tab to attempt to engage with the lead.

Muting 101

- Do not allow your reps to mute their personal #warmbound-firstname slack channel along with any channels related to Warmly alerts other than All Page Visits.
- If reps are muting channels, there could be issues with filtering on alerts or bad CRM data being sent to Warmly.

AE Involvement

- Keep AEs focus on Active Deals on Contract and Active Deals on Site
- For Active Deals on Site if the AE is busy having a SDR engage

<u>Mid-Funnel Alerts:</u> 1. AE 2. SDR	For current deals showing it the AE's responsibility to greet them on the website or the SDR	AE: the friendly face the prospect has been working with	SDR: • the AE will be busy and its better to have them be able to talk to someone than no one
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What We Do at Warmly,

We've spent years building this system to help SDRs consistently book meetings. Here's what's working for us to [win deals that have a 2x more often close rate](#):

- SDRs actively Warm Calling
- Custom workflows built into Slack + CRM + Orchestrator
- Consistent iteration every week for 8+ weeks
- Coaching loop that flags mistakes and celebrates action

WANT HELP GETTING STARTED? YOUR CSMS ARE HERE TO WALK YOU THROUGH IT STEP-BY-STEP. LET'S GET YOUR TEAM BOOKING MORE MEETINGS - FASTER!