



Best Practices Guide for Conquer Voice

Optimize Sales Communication with
Salesforce - Native Telephony

Empower Your Sales
Team to Connect,
Engage, and Win.

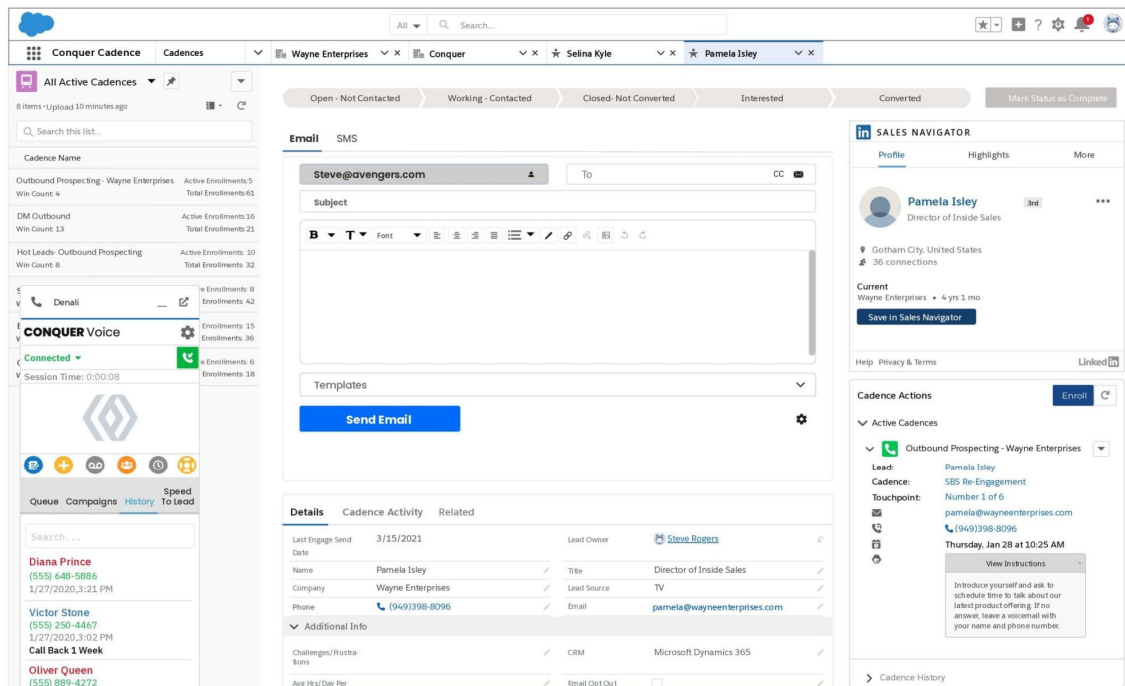
1. Introduction

Welcome to Conquer Voice

Conquer Voice is a powerful, Salesforce-native communication platform designed to revolutionize the way your sales teams connect with prospects and customers. By seamlessly integrating advanced telephony features into Salesforce, Conquer Voice eliminates inefficiencies, boosts productivity, and enhances communication quality across all channels.

Why Choose Conquer Voice?

- **Salesforce-Native Integration:** Access all telephony features directly within Salesforce, eliminating the need to switch between platforms.
- **Enhanced Productivity:** Features like Click-to-Dial, Voicemail Drop, and Speed to Lead streamline workflows, allowing reps to focus on selling.
- **Multi-Channel Engagement:** Manage voice, SMS, and email communications in one unified system.
- **AI-Driven Insights:** Leverage real-time Battlecards and predictive analytics for smarter sales conversations.



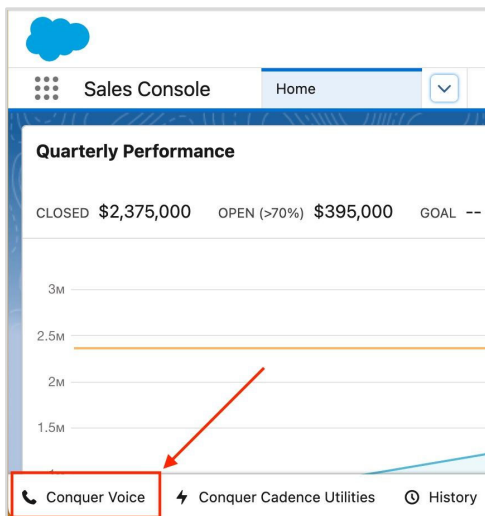
The screenshot displays the Conquer Voice interface integrated into the Salesforce CRM. The top navigation bar includes tabs for 'Conquer Cadence', 'Cadences', and 'Wayne Enterprises'. The left sidebar shows 'All Active Cadences' with a search bar and a list of active enrollments. The main workspace is divided into three sections: a top section for email composition, a middle section for 'Email' and 'SMS' communication, and a bottom section for 'Details', 'Cadence Activity', and 'Related' information. The right sidebar features the 'SALES NAVIGATOR' for the user 'Pamela Isley', showing her profile, current status, and a list of 'Cadence Actions'.

Key Benefits of Conquer Voice

1. Seamless Integration with Salesforce

Conquer Voice is built to function natively within Salesforce, meaning all call activities, data, and workflows are automatically synced. This ensures:

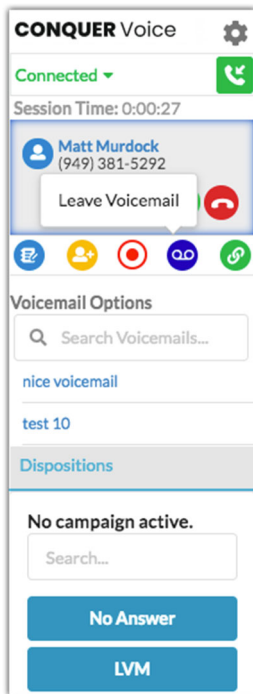
- Improved **data accuracy** with automated call logging.
- Streamlined workflows for greater **team efficiency**.
- Enhanced **user adoption** by eliminating redundant systems.



2. Boosted Sales Productivity

By simplifying time-consuming tasks, Conquer Voice empowers your team to achieve more in less time:

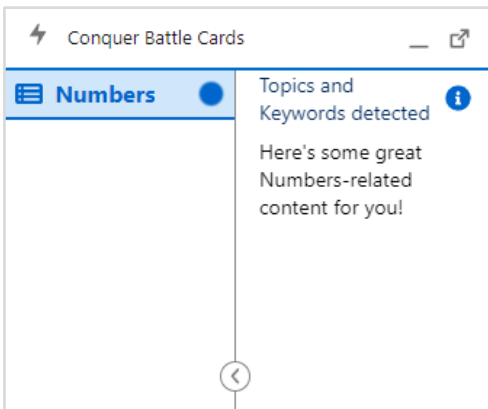
- **Click-to-Dial:** Make calls directly from Salesforce records with a single click.
- **Voicemail Drop:** Save hours by leaving pre-recorded messages with ease.
- **Speed to Lead:** Instantly connect with inbound leads to maximize conversion opportunities.



3. Improved Communication Quality

Ensure every conversation is meaningful and impactful:

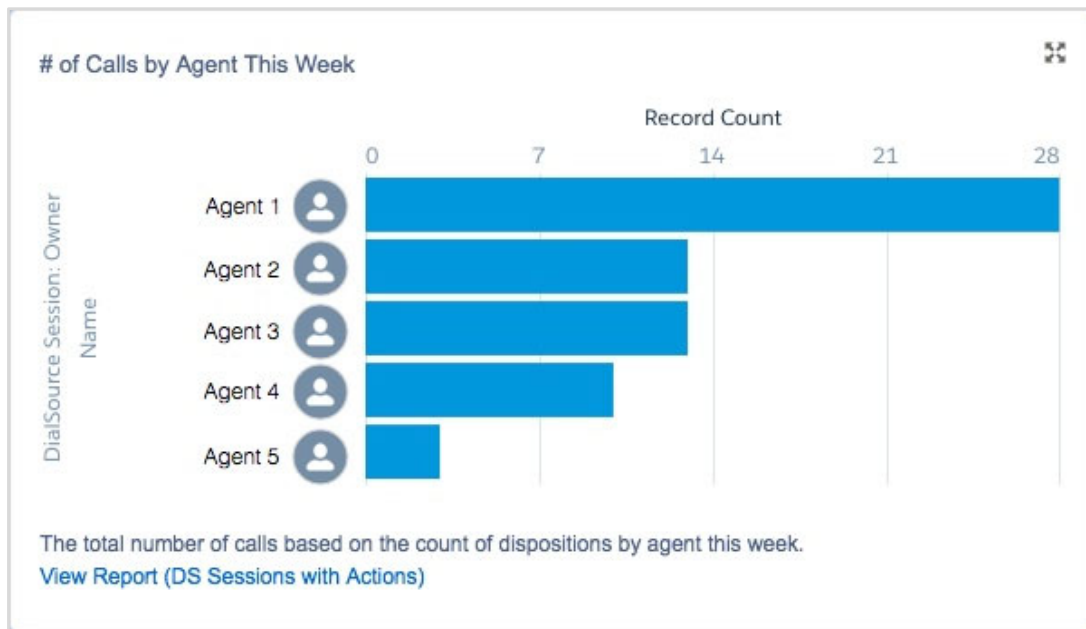
- **AI-Powered Battlecards:** Get real-time suggestions and objection-handling strategies.
- **Reputation Management:** Keep your phone numbers off spam lists to ensure higher answer rates.
- **Real-Time Caller ID Lookup:** Personalize every call by knowing who is on the line before answering.



4. Advanced Analytics for Informed Decisions

Gain actionable insights with real-time analytics and reporting features:

- Track call volume, response rates, and team performance.
- Use data to refine sales strategies and improve training programs.
- Leverage predictive analytics to forecast sales outcomes.



What This Guide Covers

This Best Practices Guide will help you:

1. **Set Up Your Conquer Voice Environment:** A step-by-step walkthrough of the initial setup for both users and administrators.
2. **Leverage Key Features:** Detailed explanations and tips for using features like Click-to-Dial, Speed to Lead, Voicemail Drop, and AI Battlecards.
3. **Optimize Post-Call Workflows:** Strategies to improve data hygiene and streamline follow-up tasks.
4. **Monitor and Improve Performance:** How to use Conquer Voice's analytics dashboard to track and enhance team performance.
5. **Resolve Common Issues:** Troubleshooting tips and best practices for seamless operation.

Who Should Use This Guide?

This guide is for:

- **Sales Leaders:** Looking to enhance team productivity and optimize workflows.
 - **Sales Reps:** Seeking to maximize their time and close more deals.
 - **Salesforce Admins:** Responsible for setting up and maintaining Conquer Voice.
 - **Customer Support Teams:** Using telephony features to enhance customer interactions.
-

Getting Started

To begin your journey with Conquer Voice, ensure you have:

- Basic knowledge of your Salesforce environment.
- Installed Conquer Voice managed package in Salesforce.
- Activated Conquer Voice license
- Access to the Conquer Support Center for additional resources.

Ready to transform your sales communication? Let's dive into the details!

2. Setting Up Your Conquer Voice Environment

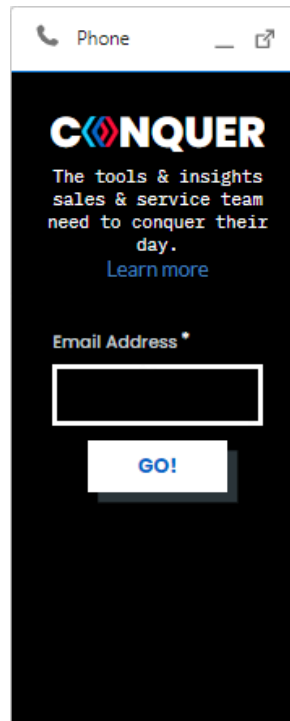
A seamless and efficient setup is key to leveraging the full potential of Conquer Voice. This section provides a step-by-step guide for configuring your user and admin settings, ensuring optimal performance and smooth integration with Salesforce.

2.1 User Account Configuration

Proper user configuration ensures your team can start using Conquer Voice effectively from day one.

Step 1: Logging into Conquer Voice

1. Ensure your **Salesforce instance is configured** to enable Conquer Voice.
2. Confirm with your Salesforce admin that the **CTI Softphone** is installed in your current Salesforce app.
3. Check that your Salesforce user has been added to the **proper call center**.
4. **Access the Conquer Voice Dialer:**
 - Log in to Salesforce, and locate the Conquer Voice dialer in the bottom-left corner of your browser window, in the configured Salesforce App.
5. **First-Time Login:**
 - Enter your work email address on the login screen.
 - Click the "GO" button to connect your account.



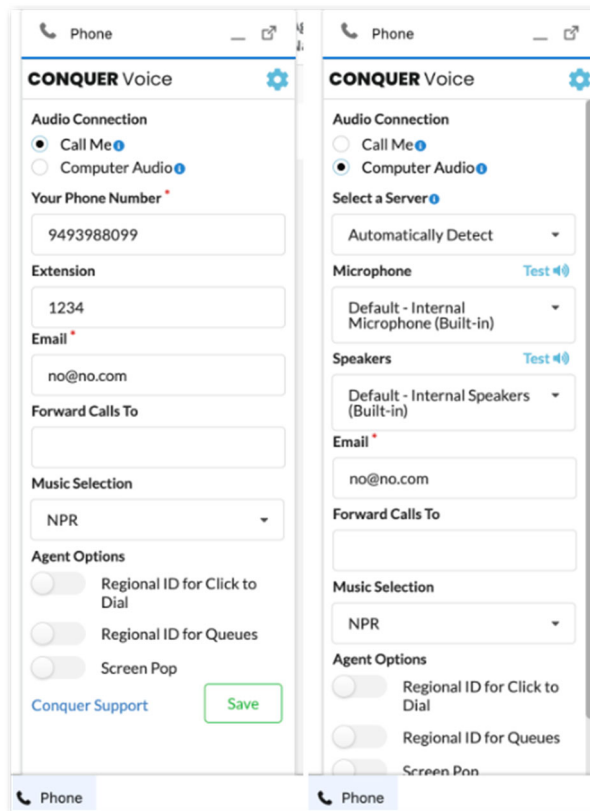
Step 2: Configuring User Settings

1. Enter Your Phone Number:

- Add the phone number you'll use for calls (desk phone, mobile, or computer audio). For international numbers, include the country code.

2. Set Up Audio Preferences:

- Choose between **Computer Audio** (use your computer's microphone and speakers, or connected headset) or **Call Me** (Conquer calls your desk phone, softphone, or mobile device to connect).
- Test your microphone and speaker settings to ensure proper functionality.



Step 3: Testing the Dialer

- Make a test call using **Dial Pad** or **Click to Dial** to verify audio quality and connectivity.
- Check that call logging works correctly in Salesforce.

Pro Tip: Save Conquer's "Call Me" number to your phone contacts to avoid spam filtering and missed connection calls.

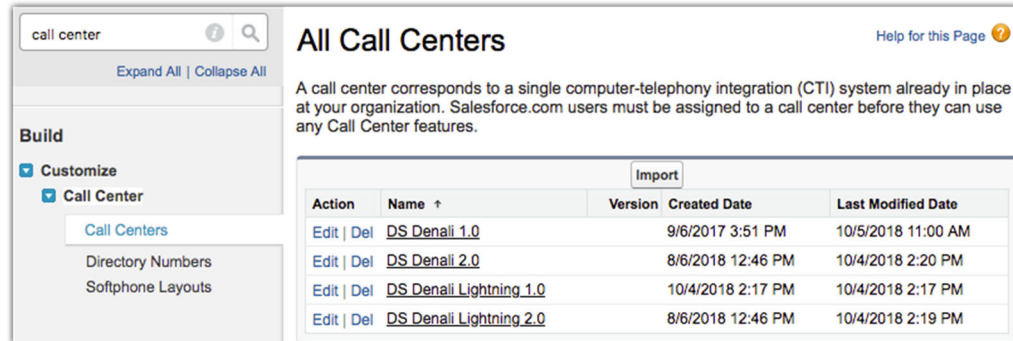
2.2 Admin Setup

Salesforce administrators play a critical role in configuring Conquer Voice for team-wide success.

Step 1: Setting Up Call Centers

1. **Update the Denali Lightning 2.0 Call Center:**
 - Navigate to **Setup > Call Centers** in Salesforce.
 - Then **Edit > Manage Users**.
 - **Search** for and **Add** all team members that should be assigned.

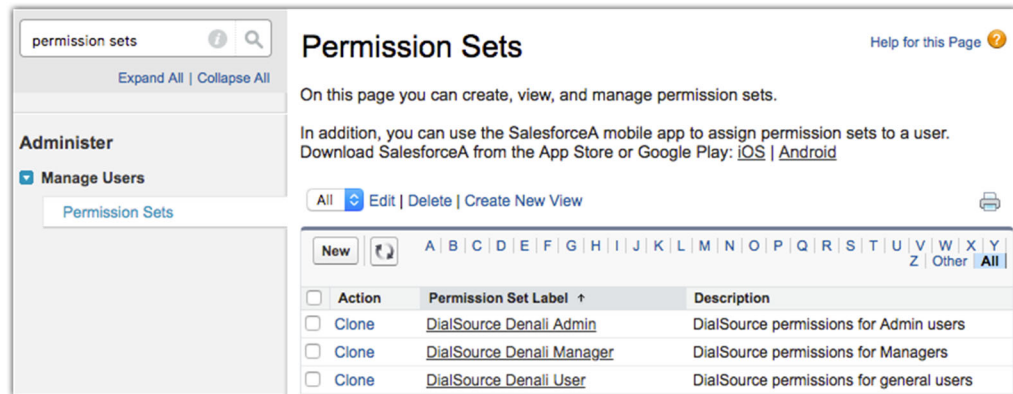
- Take note of the height and width in case future adjustments are needed.



Action	Name ↑	Version	Created Date	Last Modified Date
Edit Del	DS Denali 1.0		9/6/2017 3:51 PM	10/5/2018 11:00 AM
Edit Del	DS Denali 2.0		8/6/2018 12:46 PM	10/4/2018 2:20 PM
Edit Del	DS Denali Lightning 1.0		10/4/2018 2:17 PM	10/4/2018 2:17 PM
Edit Del	DS Denali Lightning 2.0		8/6/2018 12:46 PM	10/4/2018 2:19 PM

Step 2: Configuring User Permissions

- Grant users appropriate permissions, including:
 - Access to the Conquer Voice Dialer.
 - The ability to use features like Voicemail Drop and Speed to Lead.
- Use Salesforce permission sets to streamline this process.



Action	Permission Set Label ↑	Description
Clone	DialSource Denali Admin	DialSource permissions for Admin users
Clone	DialSource Denali Manager	DialSource permissions for Managers
Clone	DialSource Denali User	DialSource permissions for general users

Step 4: Create Disposition (Call Outcomes)

- What are Dispositions:**
 - They help manage call outcomes. The settings are in the Denali Workspace under Voice > Dispositions.
- Create a New Disposition:**
 - Click "Create Disposition" and configure settings like Name, Help Text, Require Notes, and more.
- Disposition Options:** These include staying on the current campaign record, allowing disposition without linking a record, setting a redirect URL, and specifying Do Not Call time.

Dispositions Disposition Groups				
Search			Edit Order	Create Disposition
Name	Sort Order	Created At	Last Updated ↓	Actions
No Answer	3	6/7/2023 12:52 PM	-	✎ ✖
Voicemail	1	6/7/2023 12:54 PM	-	✎ ✖
Normal Call	2	6/7/2023 12:54 PM	-	✎ ✖
Showing 1 - 3 of 3 entries « < 1 > » Show 10 25 50 100				

Pro Tip: You can use Disposition Groups and Agent Groups to keep organize your Dispositions and simplify assignments.

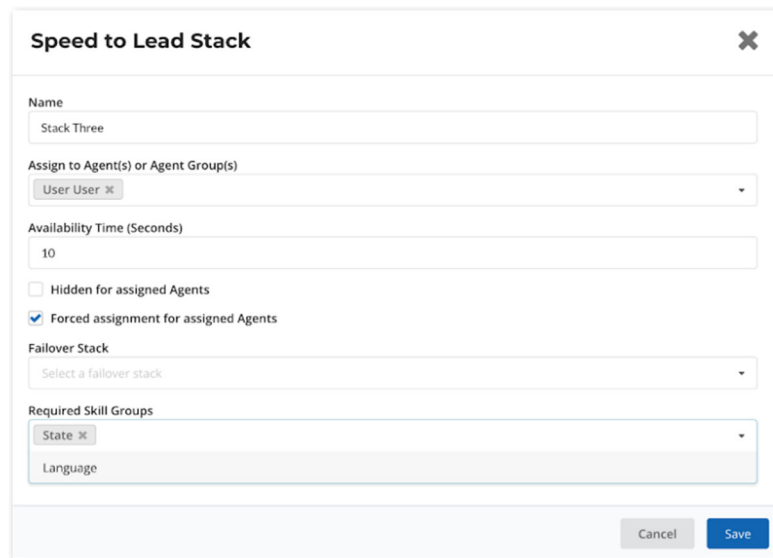
Step 3: Integrating Lead Sources

1. Create Conquer Campaigns:

- Build a Salesforce Report to your unique specifications using your data.
- Easily link the report to Conquer Voice to enable targeted calling.
- Campaigns are automatically refreshed and updated.

2. Enable Speed to Lead:

- Set up lead notification triggers for instant response.



Speed to Lead Stack [X]

Name
Stack Three

Assign to Agent(s) or Agent Group(s)
User User [X]

Availability Time (Seconds)
10

☐ Hidden for assigned Agents
☒ Forced assignment for assigned Agents

Fallover Stack
Select a fallover stack

Required Skill Groups
State [X]
Language

Cancel Save

2.3 Testing the Setup

System Health Check

1. Test the Call Flows IVR system to ensure calls are routed correctly.
2. Verify that real-time analytics and reporting data populate as expected.

Agent Connectivity

1. Confirm agents can connect to the dialer using their preferred audio method ("Computer Audio" or "Call Me").
2. Check that call outcomes (dispositions) and notes are automatically logged in Salesforce.

Quality Assurance

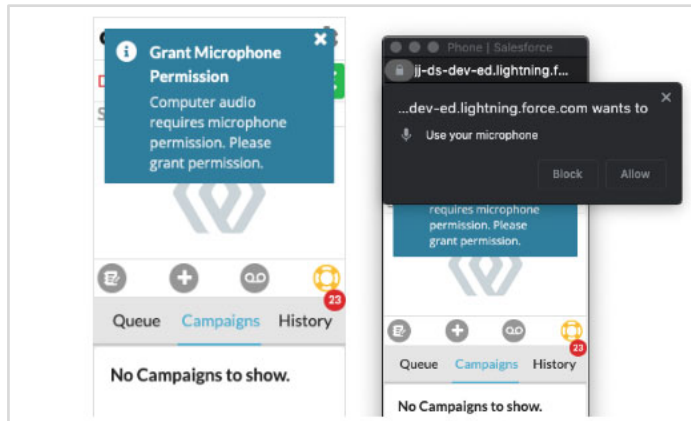
- Ensure call quality is consistent across all connection methods.
- Use test calls to identify and resolve any issues before going live.

2.4 Troubleshooting Common Setup Issues

- **Issue:** Can't locate the Conquer Voice Dialer.
 - **Solution:** Confirm the CTI Softphone is installed in your Salesforce instance.
- **Issue:** Audio not working.

- **Solution:** Check browser permissions and ensure the correct microphone and speaker are selected (if using the “Computer Audio” option).
- **Issue:** Call logs missing from Salesforce.
 - **Solution:** Verify that call logging is enabled in Conquer Voice settings.

Need Help? Contact support@conquer.io or visit the [Conquer Support Center](#).



2.5 Best Practices for Setup

- **Collaborate with IT and Salesforce Admins:** Ensure all technical and CRM settings are set to give you the proper permissions to access Conquer Voice.
- **Conduct Regular Tests:** Periodically review system performance and update configurations as required.
- **Provide User Training:** Train your team on how to log in, use features, and troubleshoot basic issues.

By following these steps, you’ll ensure your Conquer Voice environment is fully optimized for your team’s needs, paving the way for seamless integration, high productivity, and outstanding results.

3. Features and Functionality

Conquer Voice offers a range of features designed to streamline workflows, enhance communication, and improve sales outcomes. This section provides a deep dive into its core functionalities, ensuring your team can leverage them effectively.

3.1 Outbound Calling

Efficient outbound calling is at the core of Conquer Voice. With features like Click-to-Dial, campaign calling, and voicemail drop, your team can focus on meaningful conversations instead of administrative tasks.

Click-to-Dial

- **How It Works:**

- Initiate calls directly from Salesforce by clicking any phone number with an adjacent blue phone icon on any contact, lead, or opportunity record.

- **Benefits:**

- Eliminates manual dialing, reducing errors and saving time.
- Increases call volume by up to 30%.

	☐ Name ↑	Company	Phone
1	☐ 11	1	 (630) 747-8690
2	☐ Aaren Dransfield	Jabbertype	 (817) 239-3230
3	☐ abhuy kliop	xyz	 (909) 875-4353
4	☐ Adaline Molfinn	laxworks	 (817) 239-3230

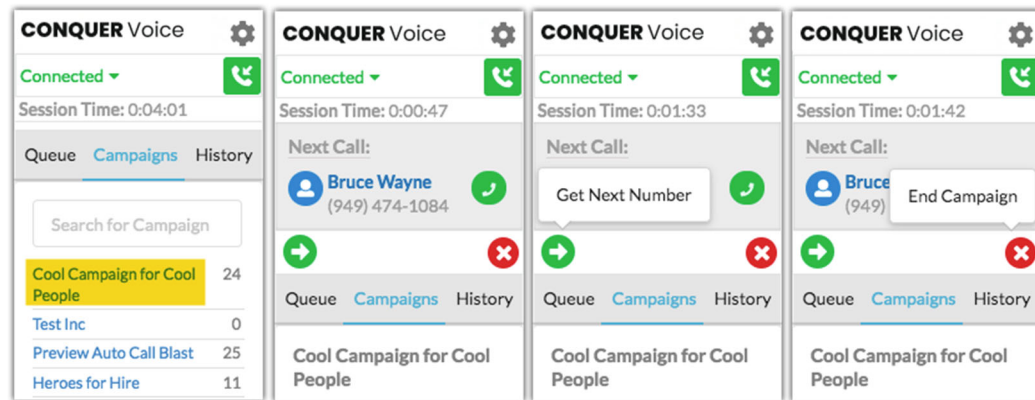
Campaign Calling

- **How It Works:**

- Utilize Salesforce campaign lists to quickly dial through numbers, prioritizing high-value contacts.

- **Benefits:**

- Ensures consistent outreach across target lists.
- Schedules calls during optimal time zones for peak engagement times.
- Keeps lists fresh with automatic updates.



Voicemail Drop

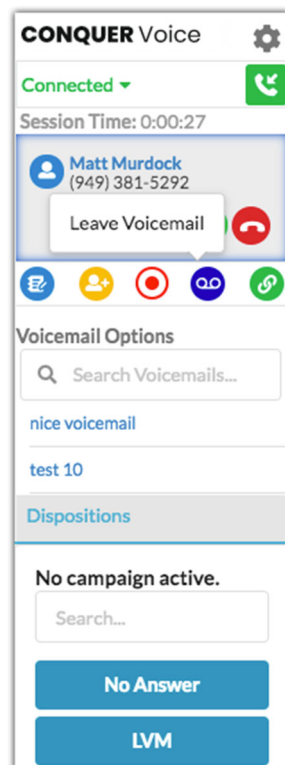
- **How It Works:**

- Leave pre-recorded voicemail messages with a single click when reaching a prospect's voicemail.

- **Benefits:**

- Saves 30-60 seconds per call.
- Ensures consistent, professional messaging.

Pro Tip: Personalize voicemail recordings for different campaigns or customer segments to improve response rates.

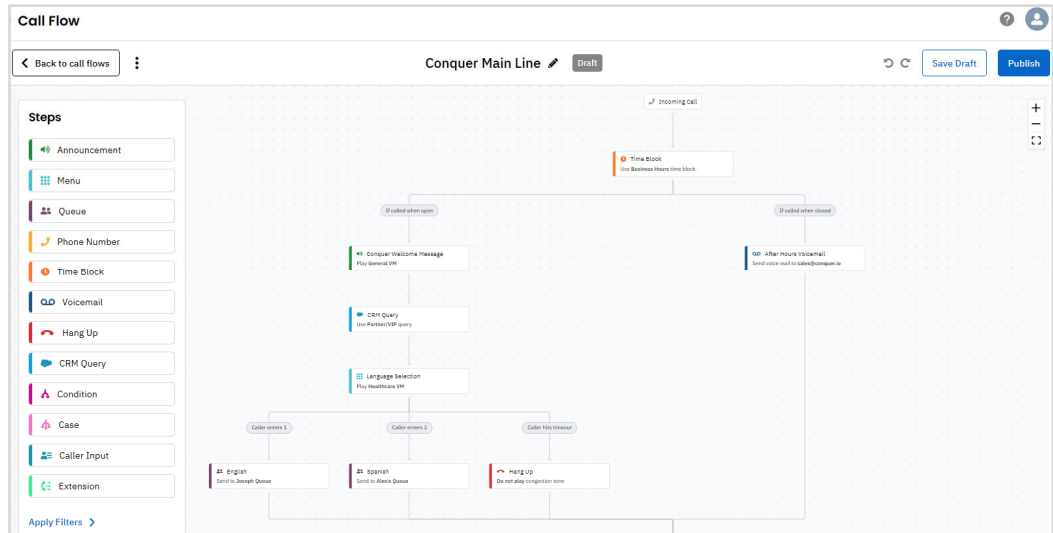


3.2 Inbound Call Management

Conquer Voice ensures every inbound call is handled efficiently, providing a seamless experience for customers and prospects.

Call Flows IVR (Interactive Voice Response)

- **How It Works:**
 - Directs callers to the appropriate department or agent based on predefined rules or dynamic queries, including routing menus (e.g., “Press 1 for Sales”), time of day, licensing, skill groups, and more.
- **Benefits:**
 - Reduces wait times and enhances customer satisfaction through a better experience.
 - Automates call routing to ensure inbound callers are directed to the best agent to meet their needs



Real-Time Caller ID Lookup

- **How It Works:**
 - Displays the caller’s details on the Inbound notification.
 - Optionally auto-navigates to the Salesforce record before answering the call.
- **Benefits:**
 - Allows reps to personalize interactions immediately for effective conversations.

- Improves first-call resolution rates.

Call Routing

- **How It Works:**

- Routes calls to agents based on skills, performance, or availability.

- **Benefits:**

- Matches customer needs with the best-suited agents.
- Reduces missed opportunities with intelligent routing.

The screenshot shows a 'Create Skill' modal window. At the top, there's a 'Name*' field with 'Spanish' entered. Below this, there are two columns: 'Unassigned Agents' and 'Assigned Agents'. The 'Unassigned Agents' column contains a search bar and a list of agents with checkboxes: Select All, Heather Adams, Kyle Skebba, Blake Cohen, Elyssa Coquilla, Marcus Davis, Tanel Harak, Joel Mayer, William Finch, Jason Hsu, and Joshua Tillman. The 'Assigned Agents' column is empty and displays the message 'No items are present'. Navigation arrows are between the two columns. At the bottom right, there are 'Cancel' and 'Save' buttons.

3.3 Speed to Lead

Speed to Lead is a game-changer for inbound lead management, ensuring your team responds to new opportunities in seconds.

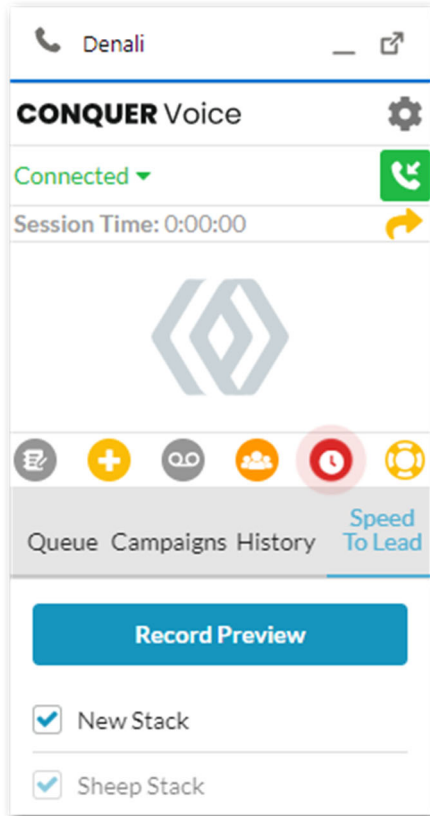
How It Works

- Sends real-time notifications to all available reps when a hot lead enters the system.
- The first rep to click the notification is connected to the lead, often within 3 seconds.

Benefits

- Increases lead conversion rates by engaging prospects during peak interest.

- Reduces response times by over 90% for many clients.

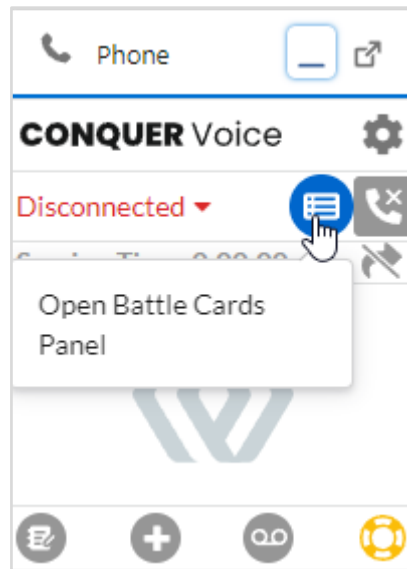


3.4 AI-Powered Features

Conquer Voice leverages AI to provide real-time insights and guidance, boosting sales performance and confidence.

AI-Powered Battlecards

- **How It Works:**
 - Displays real-time suggestions based on the prospect's words during a call (e.g., objection handling, product benefits).
- **Benefits:**
 - Shortens onboarding for new reps.
 - Improves call quality with context-aware prompts.



Predictive Analytics

- **How It Works:**
 - Uses historical data to forecast outcomes and guide call strategies.
- **Benefits:**
 - Helps prioritize high-probability opportunities.
 - Optimizes team focus for better results.

3.5 Reputation Management

Maintaining a clean caller reputation is vital for ensuring high answer rates and avoiding spam filters.

CNAM Registration

- **How It Works:**
 - Registers your company's name with telecom carriers to display on caller IDs.
- **Benefits:**
 - Builds trust and improves call answer rates.

Spam Detection and Avoidance

- **How It Works:**
 - Conquer or a third party can monitor your phone numbers for potential spam flags and take steps to mitigate.

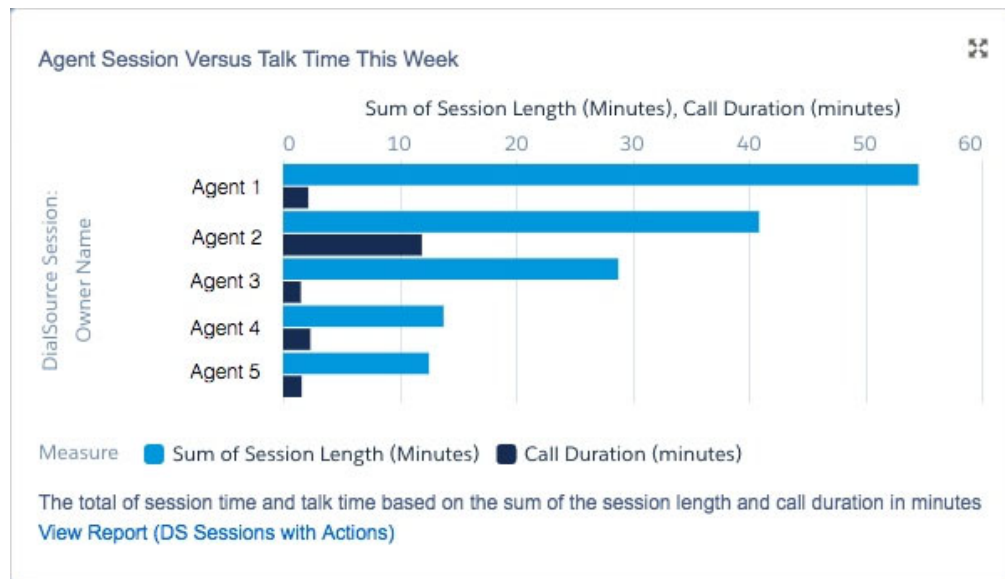
- **Benefits:**
 - Prevents numbers from being blocked or flagged, protecting your outreach efforts.

3.6 Analytics and Reporting

Real-time analytics give you the power to track, measure, and refine your sales efforts using your data that never leaves Salesforce.

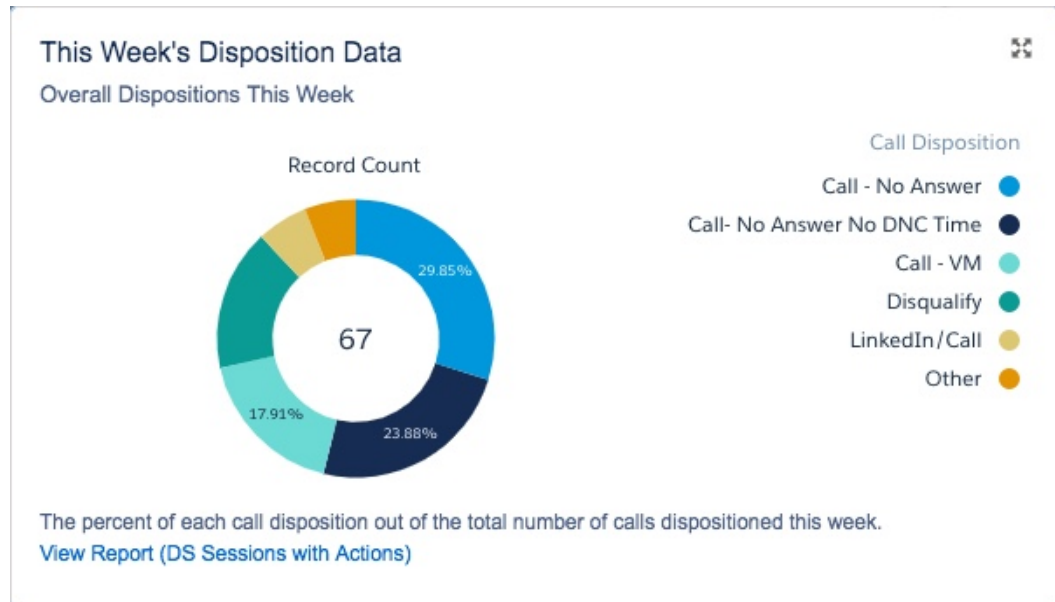
Real-Time Analytics Dashboard

- **What It Tracks:**
 - Call volume, response rates, agent performance, campaign success, and more.
- **Benefits:**
 - Provides actionable insights to optimize strategies and coach reps.



Custom Reporting

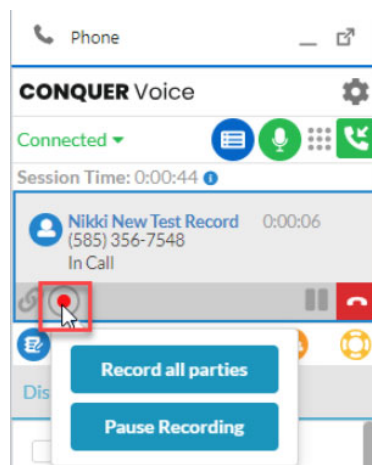
- **How It Works:**
 - Create and schedule reports tailored to your team's KPIs.
- **Benefits:**
 - Ensures data-driven decision-making at every level.



3.7 Advanced Features

Call Recording

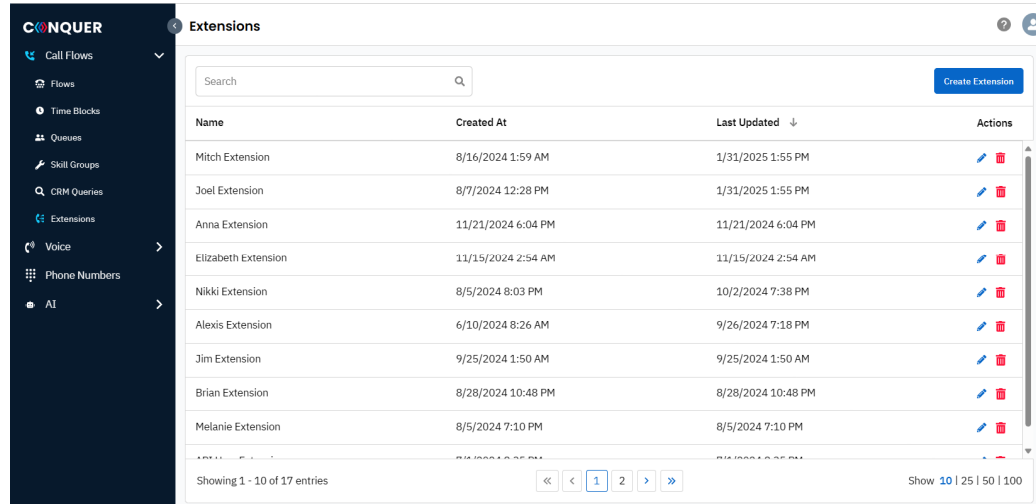
- **How It Works:**
 - Automatically records calls for training, quality assurance, and compliance.
 - Configurable on a state-by-state basis to ensure compliance with recording either one or both parties on the call.
- **Benefits:**
 - Improves coaching opportunities and ensures accurate record-keeping.



Telephony Management

- **How It Works:**

- Manage Phone Numbers, Extensions and Queues in Workspace.
- Utilize advanced features to gain more control over your calls.



The screenshot shows the 'Extensions' management page in the CONQUER system. On the left is a dark sidebar with navigation options: Call Flows, Flows, Time Blocks, Queues, Skill Groups, CRM Queries, Extensions (highlighted), Voice, Phone Numbers, and AI. The main area has a search bar and a 'Create Extension' button. Below is a table listing extensions with columns for Name, Created At, Last Updated, and Actions. The table contains 10 entries, and the footer indicates 'Showing 1 - 10 of 17 entries'.

Name	Created At	Last Updated	Actions
Mitch Extension	8/16/2024 1:59 AM	1/31/2025 1:55 PM	Edit Delete
Joel Extension	8/7/2024 12:28 PM	1/31/2025 1:55 PM	Edit Delete
Anna Extension	11/21/2024 6:04 PM	11/21/2024 6:04 PM	Edit Delete
Elizabeth Extension	11/15/2024 2:54 AM	11/15/2024 2:54 AM	Edit Delete
Nikki Extension	8/5/2024 8:03 PM	10/2/2024 7:38 PM	Edit Delete
Alexis Extension	6/10/2024 8:26 AM	9/26/2024 7:18 PM	Edit Delete
Jim Extension	9/25/2024 1:50 AM	9/25/2024 1:50 AM	Edit Delete
Brian Extension	8/28/2024 10:48 PM	8/28/2024 10:48 PM	Edit Delete
Melanie Extension	8/5/2024 7:10 PM	8/5/2024 7:10 PM	Edit Delete

- **Benefits:**

- Centralizes call operations for greater efficiency.

Best Practices for Features and Functionality

- **Adopt Click-to-Dial Across the Team:** Reduce manual dialing and improve efficiency.
 - **Leverage AI Battlecards for Coaching:** Provide reps with real-time guidance to improve conversations.
 - **Monitor Analytics Regularly:** Use data to identify trends and adjust strategies.
 - **Test IVR Menus Frequently:** Ensure customers have a smooth experience when calling in.
-

By mastering these features and integrating them into your daily workflows, your team will achieve greater efficiency, better customer engagement, and improved sales results.



4. Post-Call Workflows

Efficient post-call workflows are essential for maintaining data hygiene, streamlining follow-ups, and improving overall team productivity. Conquer Voice's features, like automated call logging, dispositions, and callback tasks, ensure that every call is accurately documented and effectively actioned.

4.1 Call Logging

Automated Call Logging

- **How It Works:**
 - Conquer Voice automatically logs all call details, including time, and duration, directly into Salesforce.
 - Agents quickly select a call outcome (Disposition) with optional notes which are attached, and then move on to the next task.
- **Benefits:**
 - Eliminates manual entry, reducing errors and saving time.
 - Provides comprehensive call records for tracking and reporting.


DialSource Action
DSA-0000095

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

[DialSource Offer \[1\]](#)

DialSource Action Detail
[Edit](#) [Delete](#) [Clone](#)

DialSource Action Name	DSA-0000095	Lead	
Owner	Eric DevOrg7 [Change]	Contact	Andy Young
Subject	Test 2: wqrqwr	Account	
Date	2/11/2018	Opportunity	
Phone Number	(669) 294-2111	Case	
		Custom Object ID	

▼ Call request Information

Call Request Initiated Time	2/11/2018 10:59 PM	# of Calls In Queue	1
Interval Datetime	2/11/2018 10:45 PM	Call Request Status	Initiated

▼ Offer Information

Initial Call Offer Time	2/11/2018 10:59 PM	# of Offers Rejected	0
Call Accepted Time	2/11/2018 10:59 PM	# of Offer Rollovers	0
Offer Outcome	Answered	Total # of Offers	1

▼ Call Information

Caller ID	(669) 294-2111	Talk Time (secs)	20
Call Placed	2/11/2018 10:59 PM	Hold Time (secs)	0
Call Started	2/11/2018 10:59 PM	Call Duration (secs)	20
Call Ended	2/11/2018 10:59 PM	Wait Time (secs)	4

▼ Post Call Information

Call Result	Dispositioned	Dispositioned Time	2/11/2018 10:59 PM
Call Campaign	IC	Wrap Up Time (secs)	23
Call Disposition	Test 2	Handle Time (secs)	47
Call Completed Time	2/11/2018 10:59 PM	Voicemail	
		DS Get Recording	

▼ Notes

Notes	wqrqwr
-------	--------

▼ Inbound Information

Inbound Phone Number Label	Prod Number Test	Agent Timeout (secs)	15
Inbound Phone Number	(669) 273-8014		

▼ DialSource System Info

Call ID	fd90daf4-d2be-4e99-9066-023b347ea1c9	Recording ID	
Session ID	746b819c-868d-48c8-ae21-9c2cc72c5cd8	Record Type	Inbound [Change]
Created By	Eric DevOrg7 , 2/11/2018 10:59 PM	Last Modified By	Eric DevOrg7 , 2/11/2018 10:59 PM

[Edit](#) [Delete](#) [Clone](#)


DialSource Offer
[New DialSource Offer](#)
[DialSource Offer Help](#)

Action	DialSource Offer Name
Edit Del	DSO-0000000110

Best Practices for Call Logging

1. Review Logs Regularly:

- Ensure all calls are being logged correctly and address any discrepancies promptly for accurate recordkeeping.

2. **Automate Data Updates and Workflows based on outcomes:**

- Provide users with a pre-configured strategic list of post-call Dispositions.
- Encourage reps to add notes before selecting their Disposition.
- Every call needs a disposition to ensure data integrity.

3. **Leverage Analytics:**

- Use logged data to analyze trends and optimize call strategies.
-

4.2 Call Dispositions

What Are Call Dispositions?

Call dispositions categorize the outcome of a call, such as "Interested," "Not Interested," or "Follow-Up Needed." They are critical for organizing data and automating next steps.

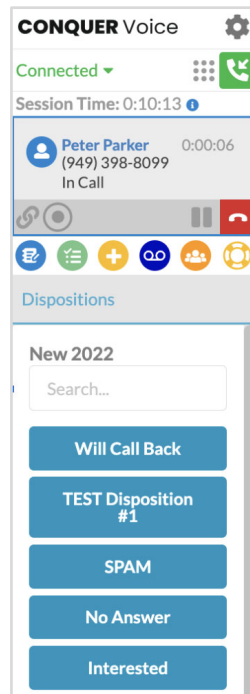
How to Use Dispositions in Conquer Voice

1. **Assign a Disposition:**

- At the end of each call, select the appropriate disposition from the blue button list of Dispositions in the Conquer Voice interface.

2. **Automate Follow-Ups:**

- Configure dispositions to trigger specific actions in Salesforce, like creating callback tasks or updating lead statuses.



Best Practices for Dispositions

- **Standardize Disposition Options:**
 - Create a clear and concise list of dispositions to ensure consistent usage across your team.
- **Train Your Team:**
 - Provide training on when and how to use each disposition.
- **Monitor Usage:**
 - Regularly review disposition data to identify patterns and refine workflows.

4.3 Automatic Field Display

How It Works

Automatic Field Display presents the relevant fields for updating records based on the selected call disposition. This feature streamlines post-call workflows and ensures accurate data entry.

Steps to Use Automatic Field Display

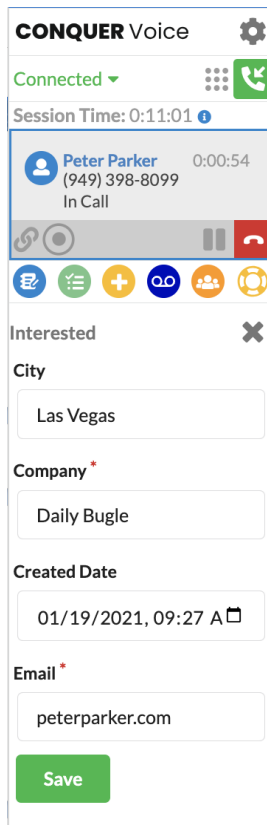
1. **Complete a Call:**
 - After finishing a call, select a disposition.

2. Update Fields:

- The mapped fields for the chosen disposition will automatically appear for input.

3. Save Changes:

- Ensure all fields are filled out and saved to maintain data hygiene.



The screenshot shows the CONQUER Voice interface. At the top, it says "CONQUER Voice" with a settings gear icon. Below that, it says "Connected" with a dropdown arrow and a green call icon. The session time is "0:11:01". A call card for "Peter Parker" is shown with the phone number "(949) 398-8099" and "In Call" status. Below the call card are icons for call controls (mute, hold, end call) and a row of feature icons. The form below the call card has the following fields:

- Disposition:** A dropdown menu currently set to "Interested" with a close icon (X).
- City:** A text input field containing "Las Vegas".
- Company:** A text input field containing "Daily Bugle".
- Created Date:** A date and time picker showing "01/19/2021, 09:27 AM".
- Email:** A text input field containing "peterparker.com".

At the bottom of the form is a green "Save" button.

Best Practices for Automatic Field Display

- **Align Fields with Workflows:**
 - Map fields to dispositions that reflect your team's specific processes.
- **Encourage Timely Updates:**
 - Train reps to update fields immediately after each call to prevent missed or incomplete data.
- **Audit Field Entries:**
 - Periodically review field updates to ensure accuracy and completeness.

4.4 Callback Tasks and Follow-Ups

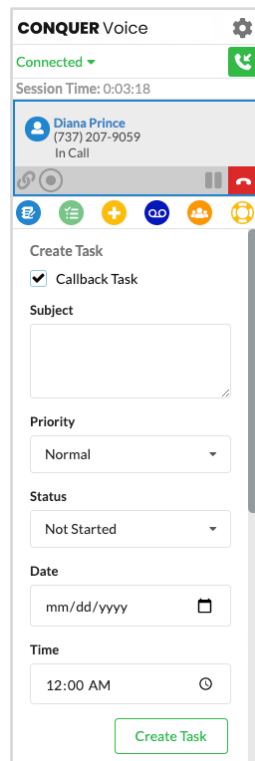
Scheduling Callback Tasks

- **How It Works:**

Use Conquer Voice to create follow-up tasks in Salesforce after each call.

- **Steps:**

1. Click the “Create Task” icon in the Conquer Voice dialer.
2. Click on the checkbox labeled as “Callback Task”.
3. Assign a due date, add any relevant notes, and select the appropriate priority and status for the task.
4. Save the task to the contact or lead record.



The screenshot shows the CONQUER Voice interface. At the top, it says 'CONQUER Voice' with a settings gear icon. Below that, it shows 'Connected' with a green checkmark and a green phone icon. The session time is '0:03:18'. A contact card for 'Diana Prince' with phone number '(737) 207-9059' is shown as 'In Call'. Below the contact card is a row of icons: a blue circle with a white 'i', a green circle with a white 'c', a yellow circle with a white plus, a blue circle with a white 'd', a red circle with a white 'x', and a green circle with a white 'h'. Below these icons is the 'Create Task' section. It has a checkbox labeled 'Callback Task' which is checked. Below that is a 'Subject' field with a text input area. Then there are three dropdown menus: 'Priority' set to 'Normal', 'Status' set to 'Not Started', and 'Date' set to 'mm/dd/yyyy' with a calendar icon. Below the date field is a 'Time' field set to '12:00 AM' with a clock icon. At the bottom of the form is a green 'Create Task' button.

Benefits of Callback Tasks

- Keeps your pipeline organized with actionable follow-ups.
- Ensures no potential opportunities are overlooked.
- Increases accountability by tracking assigned tasks.

4.5 Ensuring Data Hygiene

Why Data Hygiene Matters

Clean and accurate data is crucial for driving informed decisions, optimizing workflows, and improving customer interactions.

Best Practices for Data Hygiene

1. **Review Records Regularly:**
 - Conduct regular audits to identify and correct inconsistencies.
 2. **Minimize Manual Entry:**
 - Use automated tools like Call Logging and Automatic Field Display to reduce errors.
 3. **Validate Data:**
 - Periodically cross-check critical fields, such as phone numbers and email addresses, for accuracy.
 4. **Standardize Inputs:**
 - Establish naming conventions and formatting guidelines to ensure uniformity.
-

4.6 Best Practices Summary

- **Automate Wherever Possible:** Leverage tools like call logging, dispositions, and automatic field display to save time and reduce errors.
 - **Document Thoroughly:** Encourage reps to add detailed notes to call logs and follow-up tasks for better context.
 - **Maintain Clean Data:** Regularly review and refine workflows to ensure data accuracy and reliability.
-

By streamlining post-call workflows, your team can save time, maintain accurate records, and focus on what matters most—building relationships and closing deals. For additional guidance, visit the Conquer Support Center or contact our team for support.

5. Analytics and Performance Monitoring

Data-driven decision-making is at the heart of successful sales strategies. Conquer Voice's **Real-Time Analytics** and customizable reporting tools empower you to track performance, identify trends, and optimize your team's workflows. This section outlines how to access, interpret, and act on key metrics to maximize your sales results.

5.1 Real-Time Analytics Dashboard

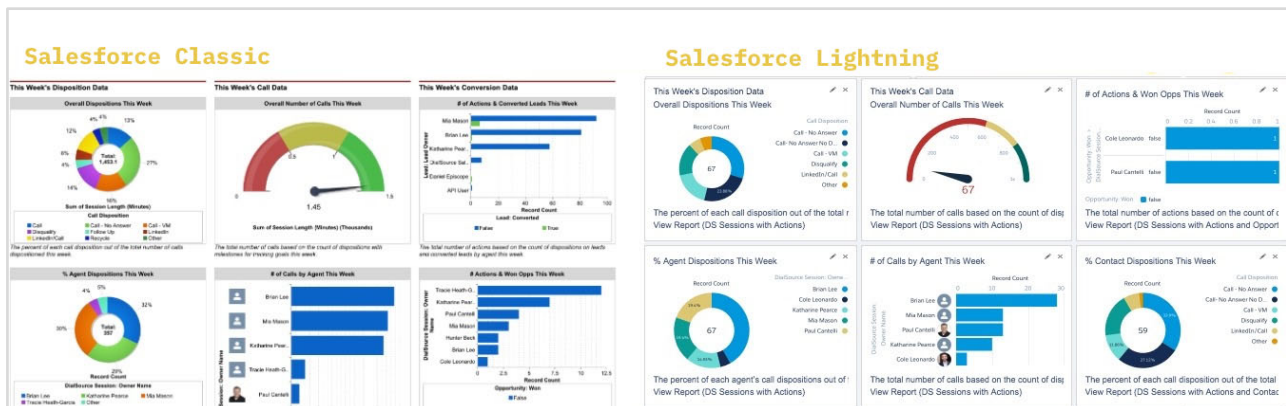
Overview of the Dashboard

The Real-Time Analytics Dashboard is your command center for monitoring team activity and call performance. It provides insights into:

- **Call Volume:** Number of calls made, received, and missed.
- **Response Rates:** Percentage of calls answered by prospects.
- **Conversion Metrics:** How calls translate into opportunities or closed deals.

Accessing the Dashboard

1. **Log into Salesforce:**
 - Navigate to **Dashboards**.
 - Search for "Base Dashboard".
2. **Explore Metrics:**
 - Use the Overview panel to monitor high-level metrics.
 - Drill down into specific campaigns, agents, or time frames using filters.



Benefits

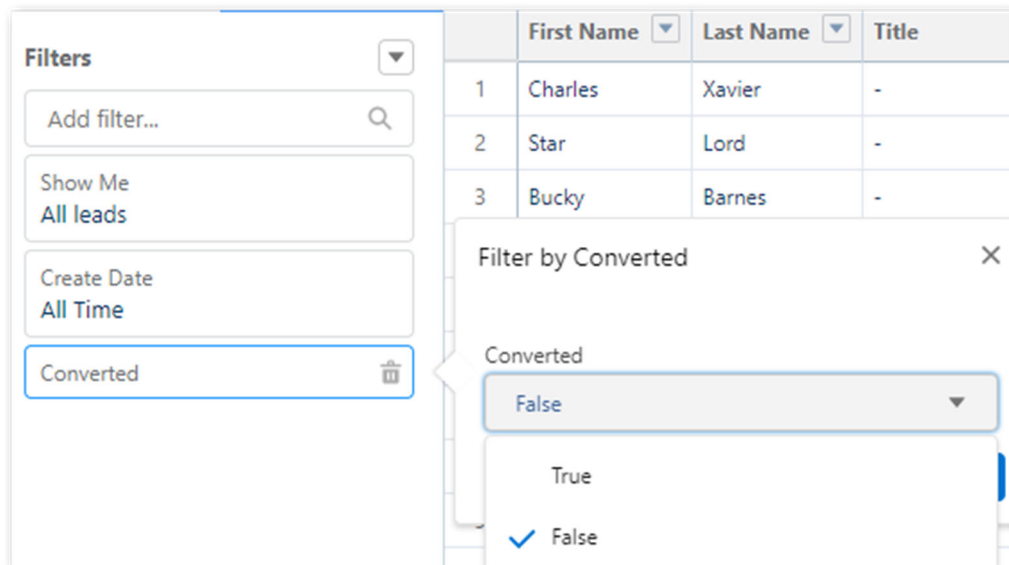
- Gain visibility into team performance at a glance.
- Identify bottlenecks, such as high missed call rates or long response times.
- Empower managers to provide real-time coaching and support.

5.2 Custom Reporting

Creating Custom Reports

Custom reports allow you to tailor analytics to your organization's unique goals and KPIs.

1. **Access Reports:**
 - In Salesforce, navigate to **Reports** and select **New Report**.
2. **Choose Metrics:**
 - Select Conquer's DSA call data object.
 - Choose data points like call outcomes, talk time, and response rates.
3. **Apply Filters:**
 - Narrow results by campaign, time period, or agent.
4. **Save and Schedule Reports:**
 - Save reports for future use and schedule them to be sent to team leaders or stakeholders regularly.



The screenshot shows the Salesforce Custom Report Builder interface. On the left, there is a 'Filters' sidebar with a search bar 'Add filter...' and three filter categories: 'Show Me All leads', 'Create Date All Time', and 'Converted'. The 'Converted' filter is selected and highlighted with a blue border. On the right, a table displays the results of the report. The table has four columns: 'First Name', 'Last Name', and 'Title'. The first three rows of data are visible: Charles Xavier, Star Lord, and Bucky Barnes. A 'Filter by Converted' dialog box is open, showing a dropdown menu for 'Converted' with 'False' selected. The dialog also shows 'True' and 'False' options, with 'False' being the selected option.

	First Name	Last Name	Title
1	Charles	Xavier	-
2	Star	Lord	-
3	Bucky	Barnes	-

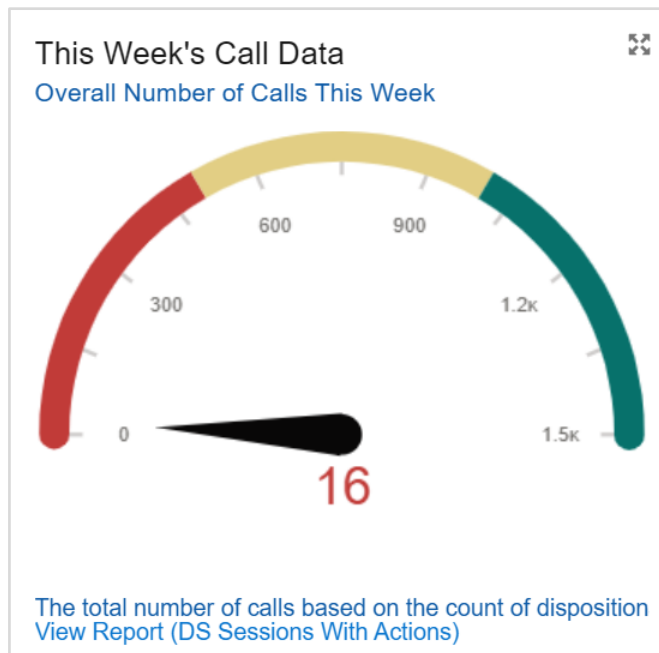
Best Practices for Custom Reports

- **Align Reports with Goals:** Focus on metrics that directly impact your team's objectives, such as lead response times or sales conversion rates.
- **Review Reports Weekly:** Use scheduled reports to track progress and make data-driven decisions.
- **Incorporate Feedback:** Regularly update reports based on insights from team leaders and agents.

5.3 Key Metrics to Monitor

A. Call Volume

- **Why It Matters:** Tracks outreach efforts and identifies capacity for additional calls.
- **How to Improve:** Use tools like Click-to-Dial and campaign calling to increase call volume.



B. Response Rates

- **Why It Matters:** High response rates indicate successful engagement strategies.
- **How to Improve:** Optimize call timing using time zone filters and maintain a clean caller reputation.

C. Conversion Metrics

- **Why It Matters:** Measures the effectiveness of calls in driving revenue.
- **How to Improve:** Use AI-powered battlecards and real-time coaching to enhance call quality.

D. Agent Performance

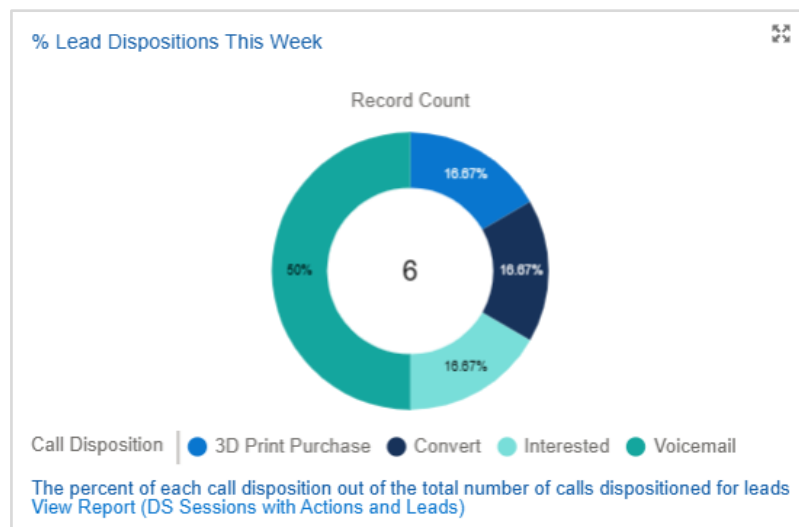
- **Why It Matters:** Helps identify top performers and areas for improvement.
- **How to Improve:** Leverage call recordings and analytics for targeted training.

5.4 Coaching with Analytics

Using Analytics for Coaching

Real-Time Analytics enables managers to deliver personalized coaching based on individual performance data.

1. **Identify Strengths and Weaknesses:**
 - Use metrics like talk time and call outcomes to spot areas for improvement.
2. **Provide Real-Time Feedback:**
 - Monitor live calls and guide agents on handling objections or improving their pitch.
3. **Track Progress:**
 - Regularly review metrics and call recordings to ensure coaching efforts translate into better performance.



Best Practices for Coaching

- **Set Clear Goals:** Define measurable objectives for each agent, such as increasing call volumes or improving conversion rates.
 - **Use Data-Driven Insights:** Base coaching sessions on tangible performance data rather than subjective observations.
 - **Celebrate Wins:** Recognize top performers and share success stories to motivate the team.
-

5.5 Troubleshooting and Support

Common Analytics Issues

- **No Data Displayed:**
 - Ensure calls are being executed using Conquer Voice.
- **Delayed Updates:**
 - Verify Conquer Voice has the proper permission to update records related to call activity.
- **Incomplete Reports:**
 - Check filters to ensure all relevant data is included.

Getting Help

- **Conquer Support:** Contact support@conquer.io for assistance.
 - **Help Center:** Access additional resources in the Conquer Support Center.
-

5.6 Best Practices for Analytics and Monitoring

1. **Monitor Metrics Daily:** Use the Real-Time Dashboard to stay updated on team performance.
 2. **Set Benchmarks:** Define target KPIs for metrics like response rates and conversion rates.
 3. **Analyze Trends:** Look for patterns in call performance to refine scripts and strategies.
 4. **Use Reports Proactively:** Schedule reports to identify areas needing attention before they impact results.
 5. **Provide Transparent Feedback:** Share analytics insights with your team to foster accountability and collaboration.
-

A decorative header pattern consisting of a series of overlapping, stylized diamond shapes in a light gray color, arranged in a horizontal row.

By mastering the analytics and performance monitoring tools in Conquer Voice, your organization can achieve greater visibility into sales activities, make data-driven decisions, and continuously improve team performance. For more resources, visit the Conquer Help Center or schedule a demo to explore advanced analytics features.



6. Advanced Use Cases

Conquer Voice offers a range of advanced features that go beyond basic calling and workflow management. By leveraging these capabilities, your team can unlock new levels of efficiency, enhance personalization, and tackle complex sales and customer service scenarios.

6.1 Integrating Conquer Voice with Third-Party Tools

Why Integration Matters

Integrating Conquer Voice with other tools in your tech stack ensures seamless workflows, better data management, and enhanced productivity.

Key Integration Opportunities

- **CRM Integration:**
 - Conquer Voice is natively integrated with Salesforce, ensuring all call activities and data are automatically synced for comprehensive tracking and reporting.
- **Email and Calendar Integration:**
 - Sync Conquer Voice with tools like Outlook or Gmail to schedule follow-ups and manage callbacks efficiently.

The screenshot displays the Conquer Voice scheduling interface. At the top left is the Conquer logo, and next to it is the text "60 minute meeting". Below this is a calendar for December 2023. The calendar shows days of the week (SUN to SAT) and dates. Several dates are highlighted with blue circles: 1, 2, 4, 5, 6, 7, 8, 9, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, and 31. To the right of the calendar is a section titled "Select a date to view available times." with a horizontal line and the word "or" below it. Below this is the "Autoschedule" feature, which says "Sign in to your email to automatically find times you're both available." and provides two buttons: "Sign in with Google" and "Sign in with Microsoft". At the bottom of the interface, there is a link to "Switch to Week View" and two location/language options: "English" and "Europe/Kiev".

- **Collaboration Platforms:**

- Integrate with tools like Slack or Microsoft Teams to send real-time notifications and updates on lead activity or campaign performance.

Best Practices

1. **Align Integration Goals:** Ensure integrations support your team's specific needs, such as lead follow-ups or campaign reporting.
 2. **Test Integrations Regularly:** Verify that data flows smoothly between Conquer Voice and third-party platforms.
 3. **Train Teams:** Educate your team on how to leverage integrations to save time and enhance collaboration.
-

6.2 Advanced IVR Routing

What is Advanced IVR Routing?

Advanced IVR routing enables businesses to direct calls to the right team or individual based on complex criteria, such as licensing, skills, or customer preferences.

How It Works

1. **Create Tailored IVR Menus:**
 - Customize menus to suit customer needs (e.g., "Press 1 for Technical Support, Press 2 for Billing").

Steps

Announcement

Menu

Queue

Phone Number

Time Block

Voicemail

Hang Up

CRM Query

Condition

Apply Filters

2. **Set Routing Rules:**
- Define conditions such as time of day, geographic location, or query for customer account status.
3. **Leverage Skills-Based Routing:**
- Automatically direct calls to the most qualified agents based on expertise or language fluency.

Create Skill Group

Name*

Language

Name ↓	Actions
Spanish	
French	
English	

Add Skill

Cancel

Save

Benefits

- Enhances the customer experience by reducing wait times and transfers.
- Increases agent efficiency by matching calls with their skills.
- Improves resolution rates through better call handling.

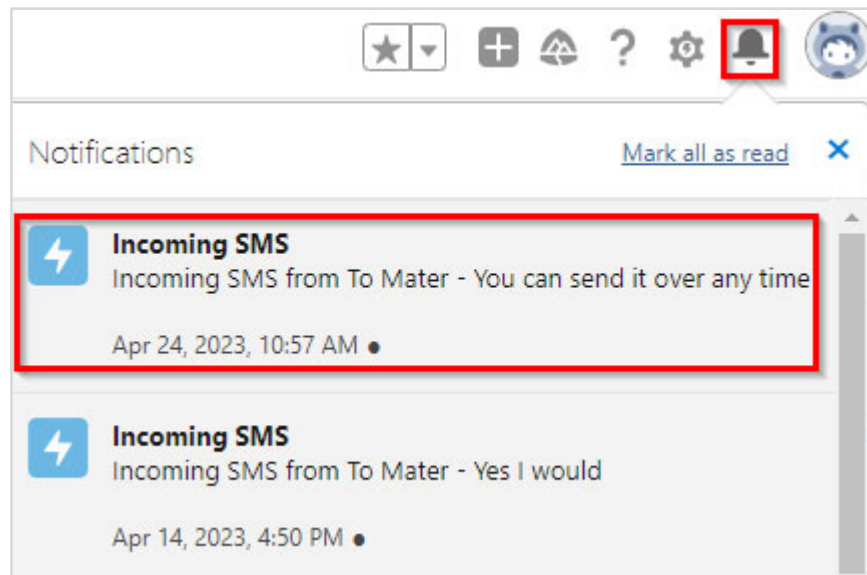
6.3 Telephony Event Triggered Notifications

What is Event-Triggered Notification?

This feature enables you to send automated notifications or alerts based on specific triggers, such as missed calls or inbound lead activity.

Use Cases

- **Sales Alerts:** Notify sales reps when a hot lead enters the pipeline.
- **Customer Service Escalations:** Alert supervisors to urgent customer issues requiring immediate attention.
- **Missed Call Follow-Ups:** Automatically generate tasks or send emails when a call is missed.



Best Practices

1. **Define Clear Triggers:** Ensure triggers align with business priorities, such as high-value leads or service escalations.
2. **Automate Follow-Ups:** Use Conquer Voice to create tasks or send pre-written responses after trigger events.
3. **Monitor Alerts:** Regularly review notification activity to optimize workflows and reduce redundancies.

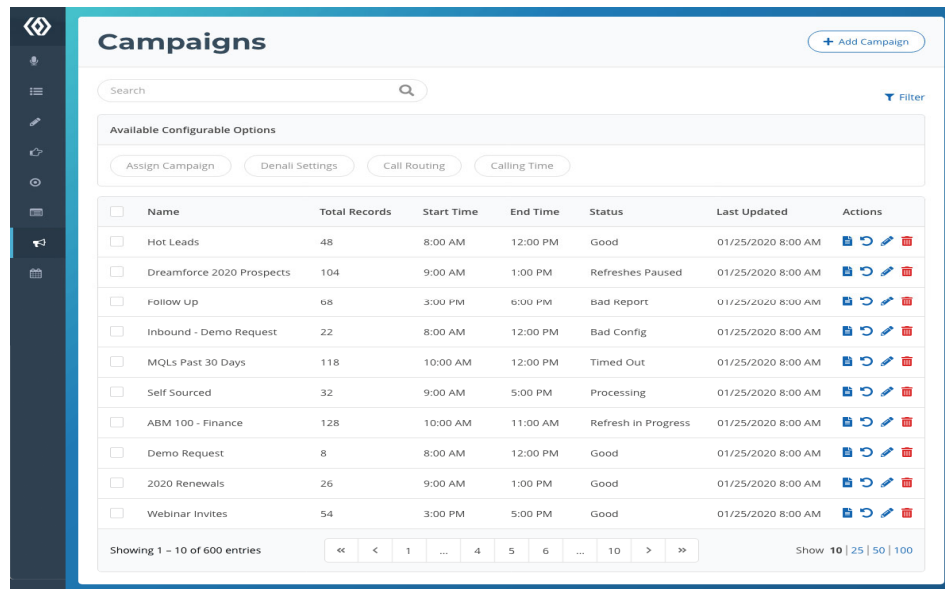
6.4 Personalized Call Campaigns

What Are Personalized Campaigns?

These are targeted outreach efforts where messaging, timing, and strategies are customized based on customer data and preferences.

Steps to Create Personalized Campaigns

1. **Segment Your Audience:**
 - Use Salesforce Reports to aggregate data and create highly specific lead or contact lists.
2. **Customize Messaging:**
 - Tailor scripts, voicemail drops, and dispositions to address the unique needs of each segment.
3. **Optimize Timing:**
 - Schedule calls based on customer time zones and engagement patterns.



☐	Name	Total Records	Start Time	End Time	Status	Last Updated	Actions
☐	Hot Leads	48	8:00 AM	12:00 PM	Good	01/25/2020 8:00 AM	📄 🔍 ✎ 🗑️
☐	Dreamforce 2020 Prospects	104	9:00 AM	1:00 PM	Refreshes Paused	01/25/2020 8:00 AM	📄 🔍 ✎ 🗑️
☐	Follow Up	68	3:00 PM	6:00 PM	Bad Report	01/25/2020 8:00 AM	📄 🔍 ✎ 🗑️
☐	Inbound - Demo Request	22	8:00 AM	12:00 PM	Bad Config	01/25/2020 8:00 AM	📄 🔍 ✎ 🗑️
☐	MQLs Past 30 Days	118	10:00 AM	12:00 PM	Timed Out	01/25/2020 8:00 AM	📄 🔍 ✎ 🗑️
☐	Self Sourced	32	9:00 AM	5:00 PM	Processing	01/25/2020 8:00 AM	📄 🔍 ✎ 🗑️
☐	ABM 100 - Finance	128	10:00 AM	11:00 AM	Refresh in Progress	01/25/2020 8:00 AM	📄 🔍 ✎ 🗑️
☐	Demo Request	8	8:00 AM	12:00 PM	Good	01/25/2020 8:00 AM	📄 🔍 ✎ 🗑️
☐	2020 Renewals	26	9:00 AM	1:00 PM	Good	01/25/2020 8:00 AM	📄 🔍 ✎ 🗑️
☐	Webinar Invites	54	3:00 PM	5:00 PM	Good	01/25/2020 8:00 AM	📄 🔍 ✎ 🗑️

Showing 1 - 10 of 600 entries

« < 1 ... 4 5 6 ... 10 > »

Show 10 | 25 | 50 | 100

Benefits

- Improves engagement rates by delivering relevant messaging.
- Builds stronger relationships with prospects and customers.
- Enhances campaign ROI by targeting the right audience with the right message.

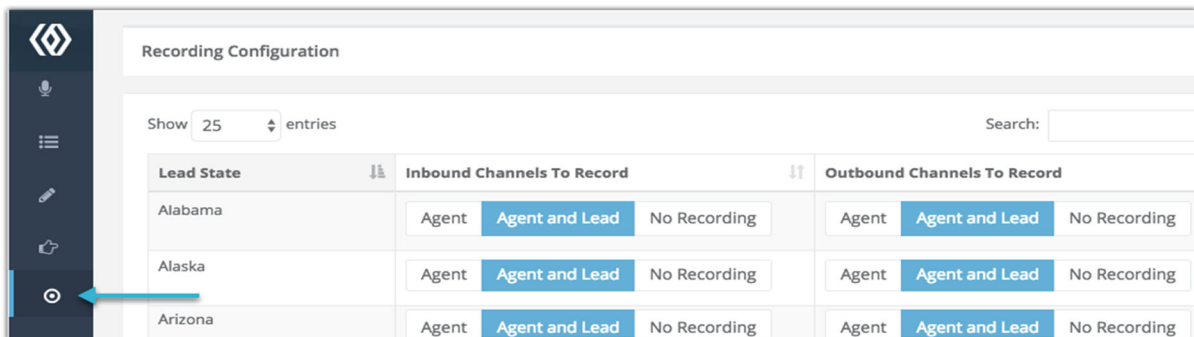
6.5 Leveraging Call Recording for Compliance and Training

Why Call Recording Matters

Call recording provides a valuable resource for compliance, quality assurance, and team training.

How It Works

1. **Enable Call Recording:**
 - Configure recording settings within Conquer Voice DS Admin settings.
 - Set rules on a state-by-state basis to respect local recording compliance regulations.
2. **Review and Analyze Calls:**
 - Use recordings to evaluate agent performance, identify coaching opportunities, or ensure compliance with industry regulations.
3. **Store Recordings Securely:**
 - Follow data privacy guidelines to manage and retain recordings.



Lead State	Inbound Channels To Record			Outbound Channels To Record		
Alabama	Agent	Agent and Lead	No Recording	Agent	Agent and Lead	No Recording
Alaska	Agent	Agent and Lead	No Recording	Agent	Agent and Lead	No Recording
Arizona	Agent	Agent and Lead	No Recording	Agent	Agent and Lead	No Recording

Best Practices

- **Obtain Consent:** Always inform callers that their conversation may be recorded.
- **Use for Training:** Identify exemplary calls to use as training materials for new agents.
- **Ensure Compliance:** Stay updated on local regulations governing call recording.

6.6 Predictive Analytics for Sales Optimization

What is Predictive Analytics?

Predictive analytics uses historical call data and machine learning to forecast sales outcomes and guide strategy.

How to Leverage Predictive Analytics

1. **Identify High-Priority Leads:**
 - Use predictive insights to focus on leads most likely to convert.
2. **Optimize Call Strategies:**
 - Adjust outreach based on patterns identified in past performance.
3. **Forecast Team Performance:**
 - Use analytics to set realistic goals and track progress.

Benefits

- Maximizes resource allocation by targeting high-value opportunities.
- Improves call outcomes by aligning strategies with data-driven insights.
- Enhances team performance forecasting and planning.

Best Practices for Advanced Use Cases

1. **Explore Integrations:** Take advantage of Salesforce-native functionality and connect Conquer Voice with other tools for seamless workflows.
2. **Test Advanced IVR Scenarios:** Regularly review and refine IVR menus and routing rules to align with customer needs.
3. **Prioritize Personalization:** Use data to tailor every interaction, from voicemail drops to live conversations.
4. **Leverage Data for Growth:** Use call recordings and predictive analytics to continuously improve team performance and customer satisfaction.

By utilizing these advanced features and scenarios, your team can unlock the full potential of Conquer Voice, improving efficiency, engagement, and overall sales success. For additional guidance, visit the Conquer Support Center or contact our team for support.

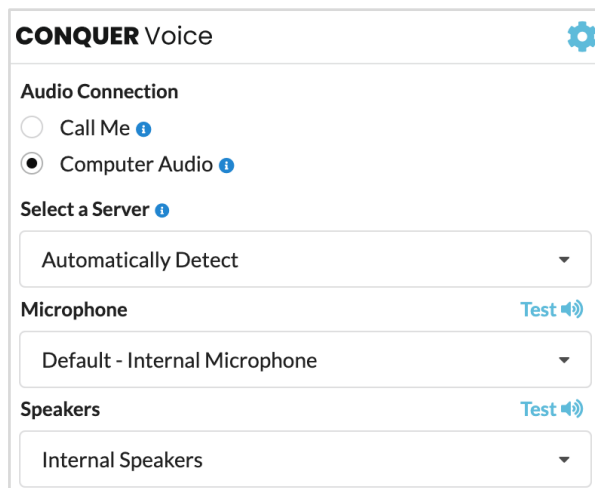
7. Troubleshooting and Support

Ensuring seamless operation of Conquer Voice is critical for maintaining productivity and communication efficiency. This section outlines common troubleshooting steps, support resources, and best practices for resolving issues effectively.

7.1 Common Issues and Solutions

1. Connectivity Problems for Computer Audio

- **Issue:** Calls disconnect or fail to connect.
- **Cause:** Network issues, browser settings, or audio configuration.
- **Solution:**
 - Verify a stable internet connection with low latency.
 - Check browser permissions to ensure the microphone and speaker are enabled for Conquer Voice (if using the “Computer Audio” option).
 - Switch to a different audio connection method (e.g., from “Computer Audio” to “Call Me”).



The screenshot shows the 'CONQUER Voice' settings panel. It includes a gear icon for settings in the top right. Under 'Audio Connection', there are two radio buttons: 'Call Me' (unselected) and 'Computer Audio' (selected). Below this is a 'Select a Server' dropdown menu currently set to 'Automatically Detect'. Further down, there are sections for 'Microphone' and 'Speakers', each with a dropdown menu and a 'Test' button with a speaker icon. The microphone is set to 'Default - Internal Microphone' and the speakers are set to 'Internal Speakers'.

2. Missing Call Logs in Salesforce

- **Issue:** Calls are not appearing in Salesforce activity history.
- **Cause:** Call logging may not be properly configured.
- **Solution:**
 - Confirm calling is occurring through Conquer Voice.

- Confirm that call logging has been properly configured to update activity history.
- Ensure that agents are selecting the correct dispositions at the end of each call.
- Check Salesforce permissions to verify logging access for users.

3. Low Audio Quality

- **Issue:** Call audio is distorted or lagging.
- **Cause:** Poor internet connection or incompatible hardware.
- **Solution:**
 - Use a wired internet connection for better stability.
 - Test and configure audio devices in the Conquer Voice settings.
 - Update your browser to the latest version.

4. Call Flows IVR Routing Issues

- **Issue:** Calls are not being routed to the correct agent or department.
- **Cause:** Incorrect IVR or routing rule configuration.
- **Solution:**
 - Review IVR menu options and associated routing rules.
 - Test Call Flows using different scenarios to ensure proper routing.

5. Caller Reputation Challenges

- **Issue:** Calls are marked as spam or blocked by recipients.
- **Cause:** Phone numbers flagged by carriers or call-blocking apps.
- **Solution:**
 - Use CNAM registration to maintain a clean caller reputation.
 - Practice healthy call behaviors to avoid false heuristic identification.
 - Rotate phone numbers periodically to avoid spam detection.
 - Monitor and address flagged numbers proactively.

7.2 Escalating Issues to Support

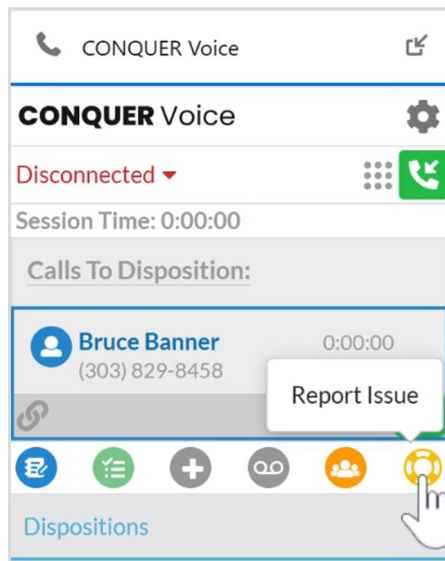
When to Contact Support

If you encounter issues that cannot be resolved with basic troubleshooting, Conquer Support is available to assist. Common scenarios include:

- Persistent call connectivity problems.
- Errors in Salesforce integration or data sync.
- Advanced IVR and telephony configuration challenges.

How to Contact Support

- **Email:** Send a detailed description of the issue to **support@conquer.io**.
- **Help Center:** Visit the Conquer Support Center for articles, guides, and FAQs.
- **Live Chat:** Access live support through the Conquer Voice interface during business hours.



Information to Include in Support Requests

- Detailed description of the issue.
- Steps taken to replicate the problem.
- Browser and operating system details.
- Screenshots or error messages, if applicable.
- Call IDs or timestamps for specific call-related issues.

7.3 Best Practices for Proactive Troubleshooting

1. Regular System Health Checks

- Use Conquer Voice's built-in tools to monitor call performance and system connectivity.
- Conduct routine checks for network stability and hardware functionality.

2. Keep Software Updated

- Always use the latest versions of your browser and Conquer Voice to ensure compatibility and access to new features.

3. Train Your Team

- Educate agents and administrators on common issues and solutions to reduce downtime.
- Provide ongoing training on best practices for using Conquer Voice efficiently.

4. Monitor Metrics

- Use analytics to identify trends that may indicate underlying issues, such as high call drop rates or inconsistent call logging.

7.4 Support Resources

Conquer Support Center

The **Conquer Support Center** is a comprehensive resource for troubleshooting and user education. Key features include:

- **Knowledge Base Articles:** Step-by-step guides on all major features and configurations.
- **FAQs:** Quick answers to common questions.
- **Video Tutorials:** Visual demonstrations of key features and workflows.

Community Forums

Engage with other Conquer Voice users to share insights, ask questions, and discuss best practices.

Webinars and Training

Attend live or on-demand training sessions hosted by Conquer experts to learn about new features and advanced functionality.

7.5 Emergency Support

For critical issues affecting business operations:

- **Priority Support:** Contact support@conquer.io with "URGENT" in the subject line.

- **Dedicated Account Manager:** If applicable, reach out to your account manager for immediate assistance.
 - **Backup Communication:** Use secondary telephony systems if Conquer Voice is temporarily unavailable.
-

7.6 Checklist for Issue Resolution

1. **Verify Network and Browser Settings:** Ensure internet stability and proper browser configuration.
 2. **Test Audio Devices:** Check microphone and speaker functionality.
 3. **Review Configuration:** Validate IVR, call logging, and routing rules.
 4. **Consult the Support Center:** Search for solutions in the knowledge base.
 5. **Contact Support:** Reach out with detailed information for unresolved issues.
-

By adopting these troubleshooting practices and utilizing available support resources, your team can minimize downtime, resolve issues efficiently, and maintain optimal performance with Conquer Voice. For additional guidance, visit the Conquer Support Center or reach out to our team.

8. Best Practices Summary

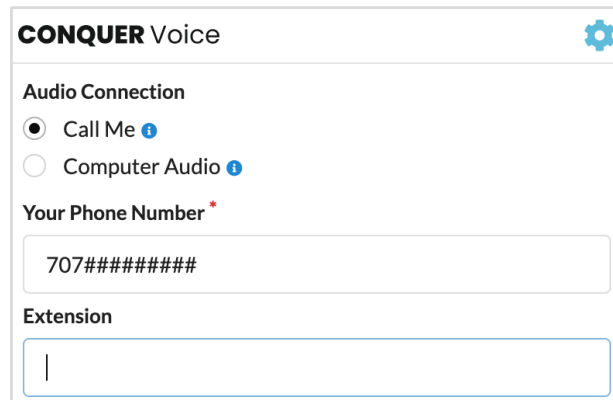
Conquer Voice is a robust Salesforce-native communication platform designed to optimize sales productivity, streamline workflows, and enhance communication quality. This section consolidates the essential best practices across all key features and functionalities to help your team achieve the best results.

8.1 Setting Up for Success

User Configuration

- **Audio Connection Setup:**

- Ensure your microphone and speaker permissions are enabled in your browser (if using the “Computer Audio” option), or use the “Call Me” feature for reliable connectivity.
- Save the Conquer Voice “Call Me” number to your contacts to avoid spam issues.



The screenshot shows the 'CONQUER Voice' settings window. It has a title bar with a gear icon. Under 'Audio Connection', there are two radio buttons: 'Call Me' (selected) and 'Computer Audio'. Below this is a field for 'Your Phone Number' with a red asterisk, containing the text '707#####'. At the bottom is an empty 'Extension' field.

- **Test Regularly:**

- Conduct initial and periodic tests of the dialer and audio settings to prevent disruptions.

Admin Configuration

- **Optimize Call Centers in Salesforce:**

- Configure call centers, assign permissions, and ensure that all agents are set up properly.

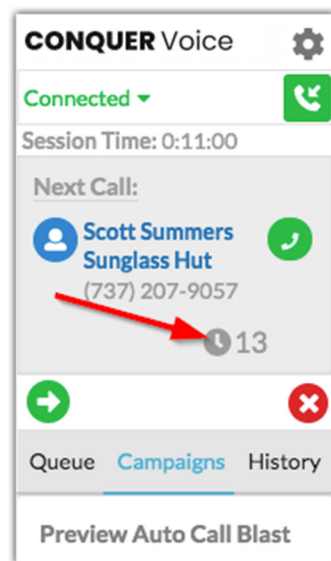
- **Set Up Campaigns, Dispositions, and Lead Sources:**

- Integrate Salesforce campaigns and lead sources with Conquer Voice for targeted outreach.

8.2 Leveraging Features and Functionalities

Outbound Calling

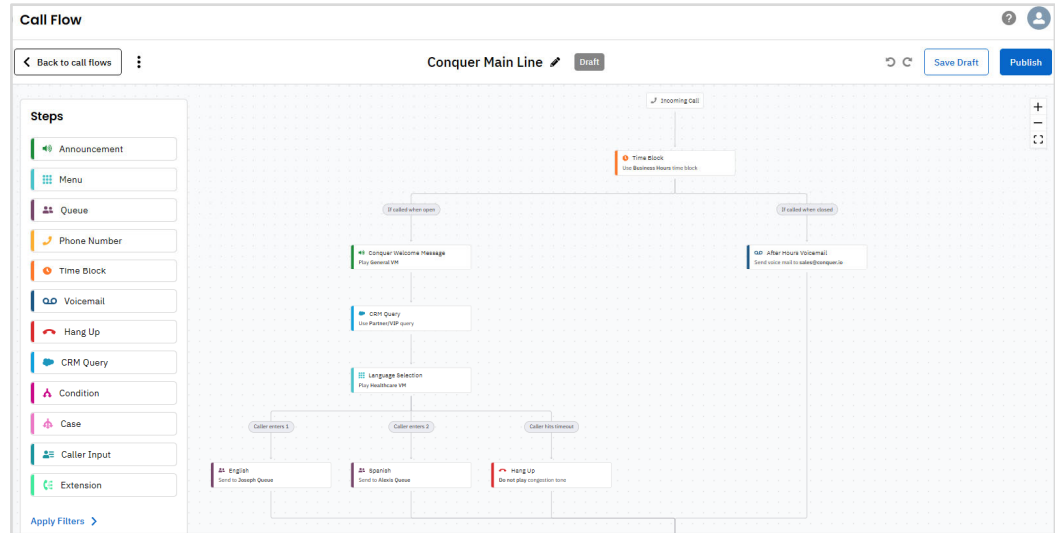
- **Use Click-to-Dial:**
 - Reduce manual dialing and save time by initiating calls directly from Salesforce.
- **Employ Campaign Calling:**
 - Prioritize high-value leads with targeted campaigns and time zone optimization.



Inbound Call Management

- **Utilize Call Flows IVR Systems:**

- Create clear and concise IVR menus to route calls efficiently.



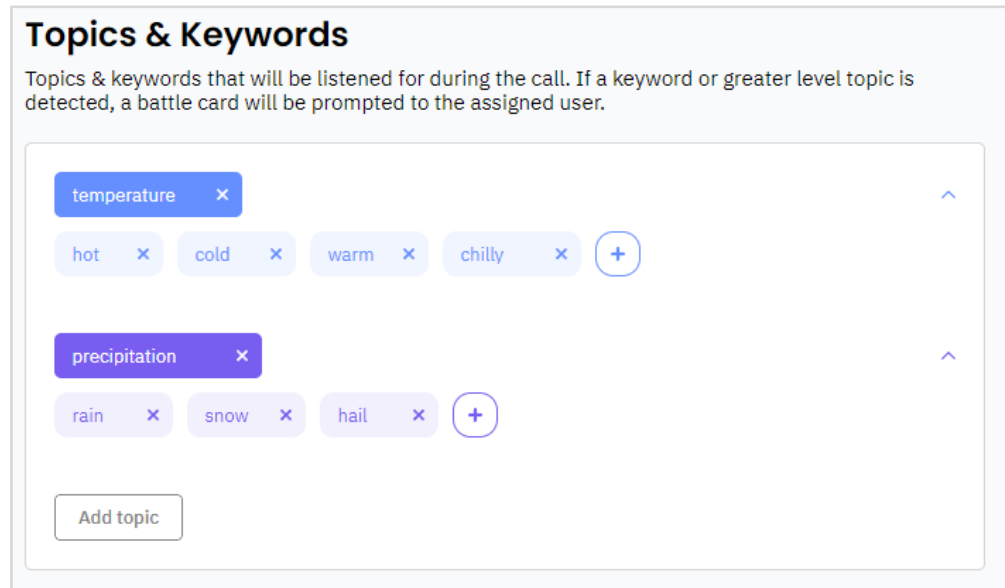
- **Leverage Real-Time Caller ID:**

- Personalize inbound calls with immediate access to caller information.

Advanced Features

- **AI-Powered Battlecards:**

- Use real-time insights to guide conversations and handle objections.



The screenshot shows the 'Topics & Keywords' interface. It includes a description: 'Topics & keywords that will be listened for during the call. If a keyword or greater level topic is detected, a battle card will be prompted to the assigned user.' Below this, there are two sections for adding topics. The first section, 'temperature', has a dropdown menu with 'temperature' selected, and a row of buttons for 'hot', 'cold', 'warm', and 'chilly', each with an 'x' to remove it, followed by a '+' button to add more. The second section, 'precipitation', has a dropdown menu with 'precipitation' selected, and a row of buttons for 'rain', 'snow', and 'hail', each with an 'x' to remove it, followed by a '+' button to add more. At the bottom, there is an 'Add topic' button.

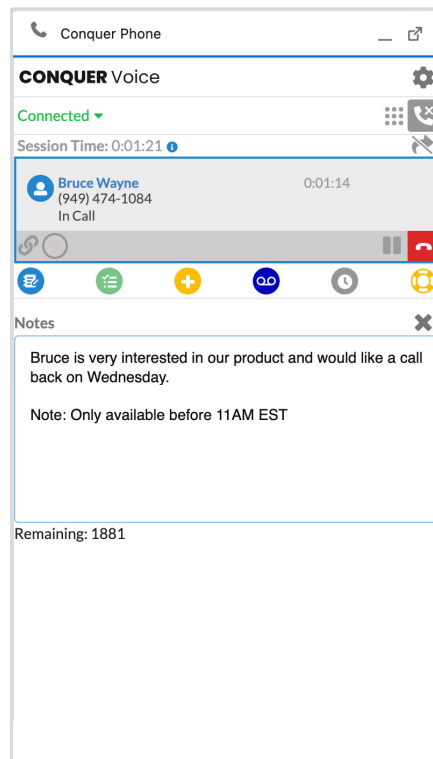
- **Reputation Management:**

- Keep phone numbers clean with CNAM registration and spam prevention strategies.

8.3 Streamlining Post-Call Workflows

Call Logging

- **Automate Data Entry:**
 - Use Conquer Voice's automatic call logging to ensure accurate Salesforce records.
- **Add Contextual Notes:**
 - Encourage reps to document key details for better follow-ups.



Dispositions and Follow-Ups

- **Standardize Dispositions:**
 - Align disposition options with sales workflows and customer segments for consistency.
- **Automate Follow-Up Tasks:**
 - Use dispositions to trigger callbacks or next steps automatically.

CONQUER Voice

Connected

Session Time: 0:03:18

Diana Prince

(737) 207-9059

In Call

Create Task

☒ Callback Task

Subject

Priority

Normal

Status

Not Started

Date

mm/dd/yyyy

Time

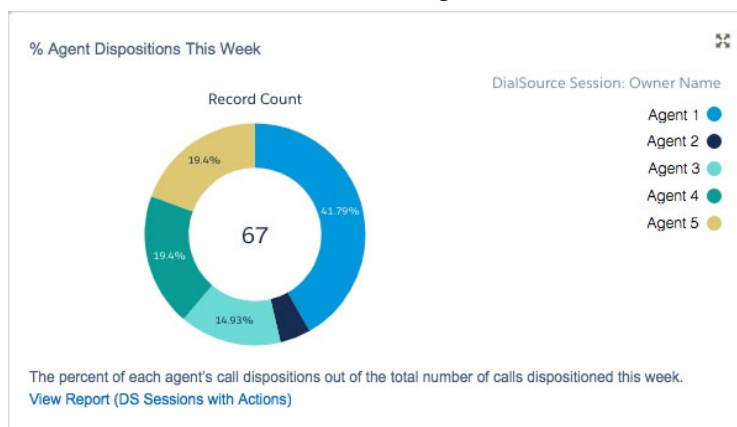
12:00 AM

Create Task

8.4 Monitoring Performance

Real-Time Analytics

- Monitor Metrics Daily:**
 - Track Volume, Outcomes, and Conversion Rates on the analytics dashboard.
- Set KPIs:**
 - Define performance benchmarks for your team, such as call targets and conversion goals.



Custom Reporting

- **Use Scheduled Reports:**
 - Automate report delivery to ensure leadership has timely insights.
- **Align Reports with Goals:**
 - Customize reports to reflect your team's unique objectives and KPIs.

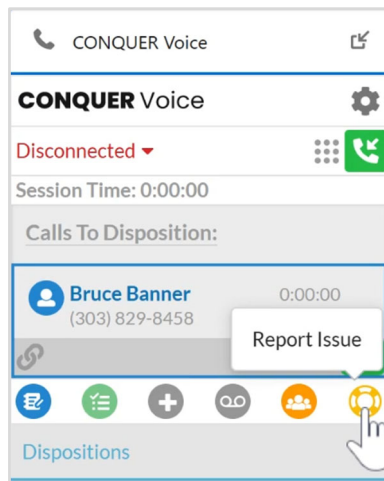
8.5 Troubleshooting and Support

Proactive Troubleshooting

- **Conduct Regular Health Checks:**
 - Test system functionality, call flows, and agent connections routinely.
- **Monitor Caller Reputation:**
 - Use tools to avoid spam flags and maintain high answer rates.

Access Support Resources

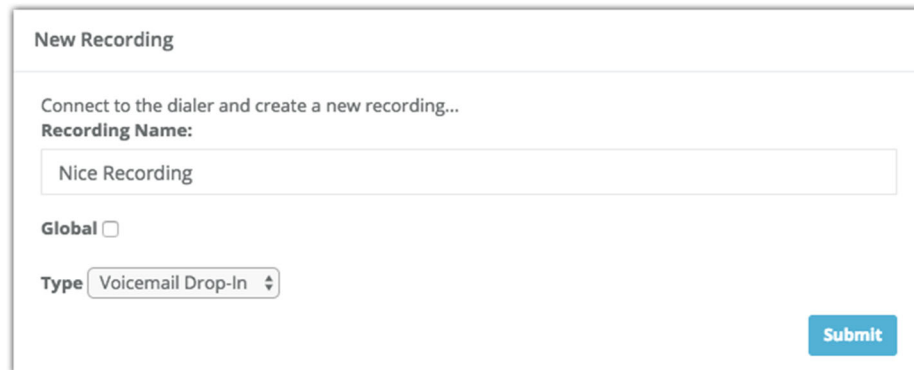
- **Conquer Support Center:**
 - Explore the knowledge base, FAQs, and video tutorials for self-service solutions.
- **Contact Support:**
 - Reach out to **support@conquer.io** for technical assistance.



8.6 Advanced Optimization Strategies

Personalization

- **Tailor Campaigns:**
 - Use Salesforce data to create segmented, personalized call lists.
- **Custom Voicemail Drops:**
 - Record targeted messages for specific campaigns or audience segments.



The screenshot shows a web form titled "New Recording". Below the title is a subtitle: "Connect to the dialer and create a new recording...". The form contains a "Recording Name:" label followed by a text input field with the value "Nice Recording". Below this is a "Global" checkbox, which is currently unchecked. At the bottom left, there is a "Type" label followed by a dropdown menu showing "Voicemail Drop-In" with a small upward and downward arrow icon. A blue "Submit" button is located at the bottom right of the form.

Predictive Insights

- **Focus on High-Value Leads:**
 - Use predictive analytics to prioritize opportunities most likely to convert.
- **Refine Strategies:**
 - Analyze trends and patterns to improve team performance over time.

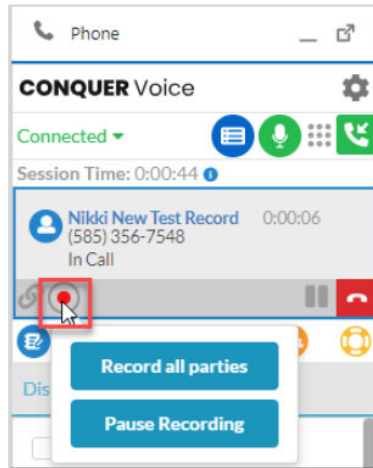
8.7 Training and Adoption

Onboarding New Users

- **Provide Comprehensive Training:**
 - Introduce new users to Conquer Voice through training sessions, video tutorials, and documentation.
- **Monitor Adoption:**
 - Track usage metrics to ensure all team members are leveraging the platform effectively.

Ongoing Development

- **Use Call Recordings for Coaching:**
 - Identify strengths and areas for improvement by reviewing call recordings.



- **Celebrate Successes:**
 - Recognize top performers to encourage best practices across the team.

8.8 Final Checklist for Best Practices

Setup and Configuration

- ☐ Ensure all users and admins are set up properly.
- ☐ Test system functionality, including IVR, call routing, and analytics.

Daily Operations

- ☐ Use Click-to-Dial and Speed to Lead features for efficient calling.
- ☐ Monitor real-time analytics to track performance.

Data Hygiene

- ☐ Automate call logging and update fields immediately after calls.
- ☐ Regularly audit Salesforce data for accuracy and completeness.

Continuous Improvement

- ☐ Leverage predictive analytics and reporting to refine strategies.
- ☐ Conduct training and coaching sessions to enhance team performance.

By implementing these best practices, your team can maximize the potential of Conquer Voice, improving productivity, customer engagement, and sales outcomes. For additional resources, visit the Conquer Support Center or schedule a demo to explore advanced features.

9. Licensing and Upgrades

Conquer Voice offers flexible licensing options designed to meet the needs of growing sales teams and enterprises. This section provides an overview of available licenses, feature access, and how to upgrade to unlock additional capabilities.

9.1 Overview of Licensing Options

Basic License

- **Features Included:**
 - Outbound calling with Click-to-Dial.
 - Basic call logging in Salesforce.
 - Standard dispositions and reporting.
- **Ideal For:**
 - Small teams looking to integrate telephony with Salesforce for the first time.

Advanced License

- **Features Included:**
 - Everything in Basic.
 - Campaign calling and voicemail drop.
 - Inbound call routing with IVR.
 - Speed to Lead for hot lead notifications.
- **Ideal For:**
 - Growing teams who require robust calling features and faster lead engagement.

Enterprise License

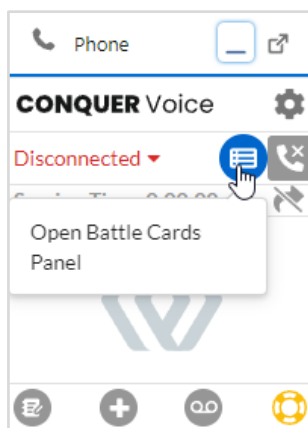
- **Features Included:**
 - Everything in Advanced.
 - AI-powered Battlecards for real-time call guidance.
 - Predictive analytics for lead prioritization and performance forecasting.
 - Advanced telephony management, including multi-location IVR routing.
- **Ideal For:**

- Enterprises seeking a fully integrated solution with advanced analytics and AI-driven insights.

9.2 Unlocking Advanced Features

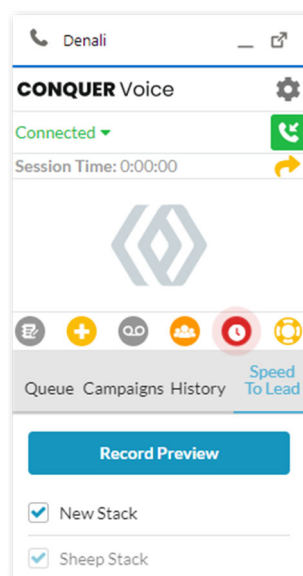
AI-Powered Battlecards

- **Benefit:** Real-time suggestions to handle objections and improve call quality.
- **How to Upgrade:** Available with the Enterprise License. Contact sales to activate.



Speed to Lead

- **Benefit:** Immediate notifications for hot leads to ensure rapid response.
- **How to Upgrade:** Included in the Advanced License. Activate by integrating lead sources in Salesforce.



Predictive Analytics

- **Benefit:** Use historical data to forecast sales outcomes and optimize team strategies.
 - **How to Upgrade:** Exclusive to the Enterprise License. Contact sales for a demo.
-

9.3 How to Upgrade Your License

Step 1: Identify Business Needs

- Evaluate current feature usage and determine gaps in functionality.
- Identify advanced capabilities (e.g., AI insights, advanced analytics) that align with your goals.

Step 2: Contact Conquer Sales

- **Email:** Reach out to sales@conquer.io with your requirements.
- **Schedule a Demo:** Use the **Calendly link** to explore features included in higher-tier licenses.

Step 3: Upgrade Implementation

- Work with Conquer Support to seamlessly transition to the upgraded license.
 - Ensure all team members are trained on new features.
-

9.4 Licensing FAQs

Q1: Can I add features to my existing license?

Yes, features like Speed to Lead and AI Battlecards can be added to some licenses. Contact sales for details.

Q2: How does licensing scale with my team?

Licenses are designed to scale with your team size. Additional seats can be purchased as your team grows.

Q3: Are there discounts for annual subscriptions?

Yes, Conquer offers discounts for annual billing. Contact sales for pricing information.

9.5 Benefits of Upgrading

- **Enhanced Productivity:** Advanced tools like voicemail drop and predictive analytics streamline workflows.
- **Better Customer Engagement:** Features like Speed to Lead and personalized IVR menus improve response times and customer satisfaction.
- **Data-Driven Insights:** Predictive analytics and real-time dashboards empower your team to make smarter decisions.

9.6 Contacting Sales for Licensing Support

For detailed information about licenses or to upgrade your plan:

- **Email Sales:** sales@conquer.io
- **Schedule a Demo:** [Get a Demo](#)
- **Visit the Conquer Support Center:** support.conquer.io

By selecting the right license and upgrading as your needs evolve, your team can maximize the capabilities of Conquer Voice, driving higher efficiency, better customer engagement, and improved sales outcomes. For more resources or personalized assistance, reach out to our sales or support teams.



10. Appendix

The Appendix provides additional resources, a glossary of key terms, and links to guides that support your journey with Conquer Voice. Use this section as a quick reference to ensure you get the most out of your platform.

10.1 Glossary of Key Terms

Click-to-Dial

A feature allowing users to initiate calls directly from Salesforce by clicking any phone number on a lead, contact, or opportunity record.

Voicemail Drop

A functionality that enables users to leave pre-recorded voicemail messages with a single click, saving time on outbound calls.

Speed to Lead

An advanced feature that alerts reps to hot leads in real-time, enabling them to respond within seconds.

AI-Powered Battlecards

Real-time call guidance that provides reps with talking points, objection-handling strategies, and relevant information based on conversation context.

Call Flows IVR (Interactive Voice Response)

An automated system that routes incoming calls based on user input, such as “Press 1 for Sales,” or other rules such as licensing, skills, time of day, and more.

Predictive Analytics

The use of historical call data and machine learning to forecast outcomes and optimize strategies.

CNAM Registration

A process to register a company’s name with telecom carriers to improve caller ID recognition and reduce spam labeling.

10.2 Links to Key Guides and Resources

[Getting Started with Conquer Voice](#)

- [User Settings and Audio Configuration](#)
- [Admin Setup for Call Centers](#)

Using Key Features

- [Making Calls with Click-to-Dial](#)
- [Setting Up Campaign Calling](#)
- [Creating Voicemail Drops](#)

Advanced Features

- [Configuring Speed to Lead](#)
- [Utilizing AI Battlecards](#)

Performance Monitoring and Reporting

- [Using the Real-Time Analytics Dashboard](#)
- Creating Custom Reports in Salesforce

Troubleshooting and Support

- [Common Issues and Solutions](#)
- [Contacting Conquer Support](#)

10.3 FAQs

Q1: How do I know if my setup is correct?

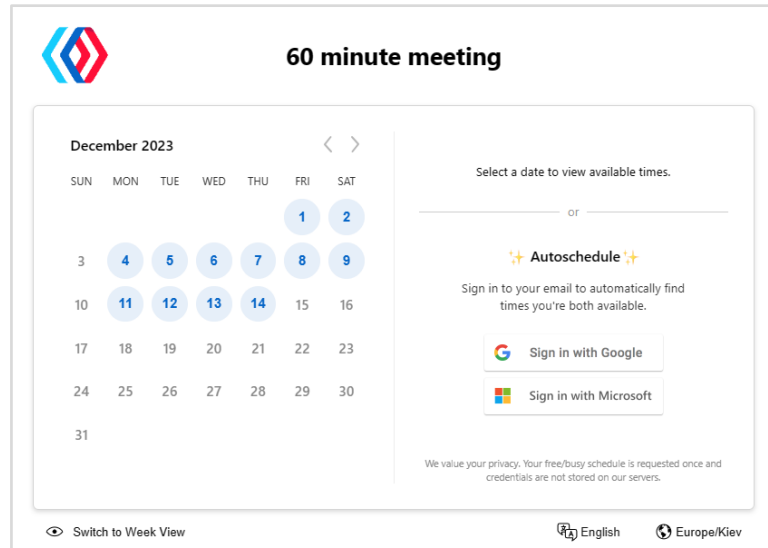
- Run test calls using both inbound and outbound features.
- Ensure data syncs correctly with Salesforce by reviewing call logs and analytics.

Q2: What if I encounter spam issues with outbound calls?

- Register phone numbers with CNAM to maintain a clean caller reputation.
- Contact support for advanced reputation management tools.

Q3: Can I integrate Conquer Voice with third-party tools?

- Yes, Conquer Voice integrates seamlessly with tools like Gmail, Outlook, Slack, and Microsoft Teams.



10.4 Support Resources

Conquer Support Center

A comprehensive resource for articles, tutorials, and troubleshooting tips.

- Visit: support.conquer.io

Live Support

Access live chat or email support for technical assistance.

- **Email:** support@conquer.io

Scheduled Training

Join live webinars or schedule custom training sessions for your team.

- [View Upcoming Webinars](#)

10.5 Checklist for Success

1. Set Up and Configure:

- ☐ Complete user and admin setup.
- ☐ Test call functionality and ensure IVR menus are operational.

2. Train Your Team:

- ☐ Provide training on Click-to-Dial, voicemail drops, and other features.
- ☐ Educate agents on using real-time analytics and battlecards.

3. Monitor Performance:

- ☐ Regularly review analytics dashboards and custom reports.
- ☐ Adjust strategies based on predictive analytics insights.

4. Optimize Features:

- ☐ Use Speed to Lead for immediate lead engagement.
- ☐ Keep phone numbers clean with reputation management tools.

5. Seek Support When Needed:

- ☐ Utilize the Conquer Support Center for quick solutions.
- ☐ Contact live support for complex issues.

By leveraging the resources and tools outlined in this Appendix, your team can unlock the full potential of Conquer Voice. Whether you're troubleshooting an issue or exploring advanced features, the support you need is always within reach.



Additional Conquer.io Tools

Conquer.io offers a comprehensive suite of tools designed to enhance your sales and service operations. Beyond Conquer Voice, the following solutions can further empower your team to achieve exceptional results:

Conquer Cadence

Conquer Cadence is a Salesforce-native sales engagement platform that enables your team to design and execute multi-channel communication strategies. With an intuitive drag-and-drop builder, you can create personalized outreach sequences across voice, email, SMS, and social channels. This ensures consistent and timely interactions with prospects and customers, ultimately accelerating your sales cycle.

Key Features:

- **Multi-Channel Outreach:** Engage prospects through their preferred communication channels.
- **Automated Workflows:** Streamline repetitive tasks to focus on high-value activities.
- **Real-Time Analytics:** Monitor engagement metrics to optimize your strategies.

Cadence Actions

Enroll

Active Cadences

CONQUER QUOTE

Apr 13

Contact:

Cadence:

Touchpoint:

Account:

Opportunity:

Peter Parker

Conquer Closing Demo

Number 1 of 3

peterparker@avengers.com

(737) 207-9056

Thursday, Apr 13 at 1:45 PM

Avengers

Opportunity for Avengers -

View Instructions

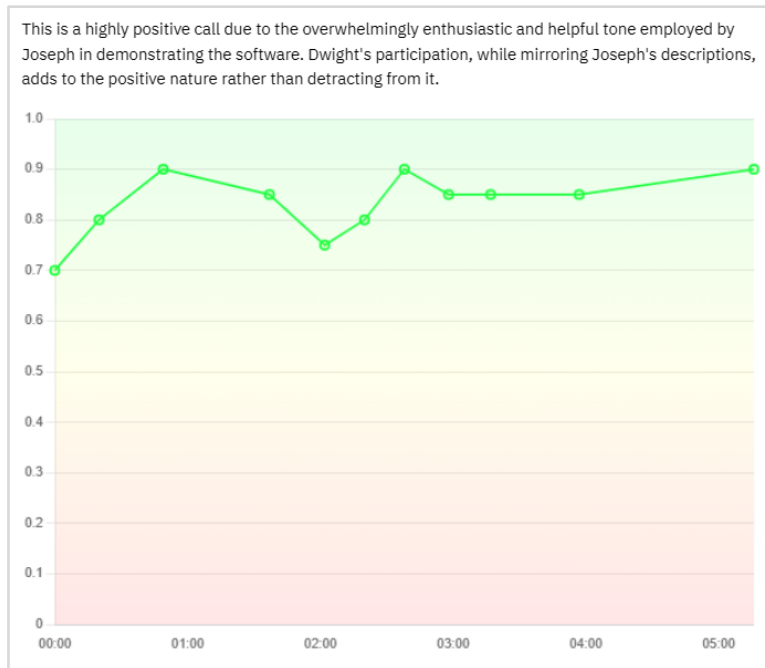
Cadence History

Conquer AI Insights

Leverage artificial intelligence to gain actionable insights into your sales processes. Conquer's AI-driven tools analyze data to provide strategic guidance, helping your team prioritize leads and tailor responses effectively. This data-driven approach enhances decision-making and boosts overall sales performance.

Key Features:

- **Lead Scoring:** Identify high-priority leads based on predictive analytics.
- **Conversation Intelligence:** Analyze call data to extract valuable insights.
- **Performance Forecasting:** Predict sales outcomes to inform strategy.



Experience the Full Power of Conquer

Discover how Conquer's suite of tools can transform your sales and service operations. By integrating these solutions, your team can achieve higher efficiency, better customer engagement, and accelerated revenue growth.

Ready to Elevate Your Sales and Service Strategy?

Schedule a personalized demo today to see how Conquer's comprehensive platform can meet your organization's unique needs.

[Get a Demo](#)