True Call Script Guide

Introduction

Welcome to the True Call Scripts

Welcome to the True Call Scripts! This guide will walk you through the various features and functionalities of our True Call Scripts app, designed to help you manage and optimize your sales efficiently. But before we dive into the app, let's talk about why we are here.

Why We Need Sales Scripts

Sales scripts are essential tools for any successful sales team. Here's why they are indispensable:

- Consistency: Sales scripts ensure that your team delivers a consistent message to all prospects, maintaining the integrity of your brand and value proposition.

- Efficiency: By providing a clear structure and pre-defined responses to common objections, sales scripts save time and enable your team to handle sales interactions more effectively.

- Training and Onboarding: Scripts serve as valuable training tools for new sales representatives, helping them learn best practices and become productive quickly.

- Improved Conversion Rates: Well-crafted sales scripts can help improve conversion rates by guiding sales reps through a proven process that addresses the prospect's needs and objections effectively.

- Focus on Key Points: Scripts help ensure that important features, benefits, and selling points are not overlooked during sales conversations.

- Adaptability: While providing a structured framework, scripts can be tailored to specific prospects and situations, allowing for personalized interactions.

- Confidence Boost: Having a script to follow can boost the confidence of sales reps, especially those who are less experienced, enabling them to engage more effectively with prospects.

Overview

The True Call Scripts is a powerful tool designed to streamline your sales process. It features several key tabs and functionalities to help you manage and optimize your sales efforts:

- Accounts, Leads, and Contacts: Manage your business accounts, leads, and contacts efficiently with easy access to key sales data.

- Sales Scripts Tab: Create and organize detailed sales scripts, providing structured guides for your sales team.

- Script Run History Tab: Track and measure the effectiveness of your sales scripts, gaining insights for data-driven improvements.

- Script Screen Stages Tab: Define and manage the steps of your sales scripts, ensuring a clear and structured sales process.

Together, these features ensure consistent messaging, efficient sales interactions, and data-driven improvements, boosting your sales team's performance.

Getting Started

Installing

Step 1: Accessing the Installation Link:

Go to AppExchange or just click here:

  - Open your web browser and navigate to the Salesforce AppExchange platform.
  - In the search bar, type “True Call Script” and press enter.
  - Locate our True Call Script application in the search results and click on it to access the application page.

Step 2: Initiating Installation:

- Once you're on the application page, look for the "Get It Now" button and click on it to initiate the installation process.

Step 3: Confirm Installation details:

- Review the permissions required by the True Call Script application to ensure they align with your organization's policies and requirements.
- Click on “Confirm and Install” to proceed with the installation.

Step 4: Choosing Your Role:

- You will be prompted to choose your role or user type within your Salesforce organization. Select the role that best aligns with your responsibilities and access needs.

Step 5: Installation Confirmation:

- After confirming the installation, you may be prompted to log in to your Salesforce account if you haven't already done so.
- Follow the on-screen instructions to complete the installation process. You may need to agree to additional terms and conditions.

  After installation, you will receive an e-mail letter from Salesforce support about successfully installing our application.

Logging into application

Logging In and Accessing True Call Script:

- Log In to Salesforce.
- Navigate to the App Launcher.
- Type "Sales Script Manager" in the App Launcher.
- Select Sales Script Manager from the Search Results.
- Access Sales Script Manager App.

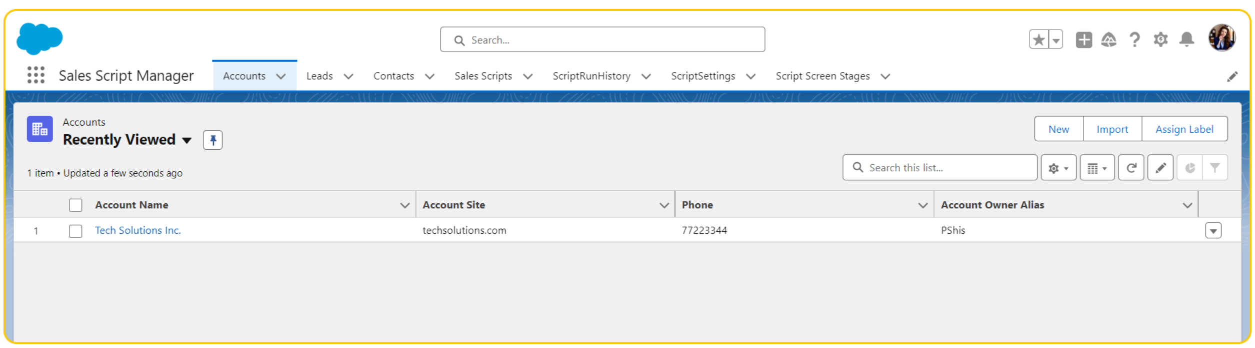
Congratulations! You've successfully logged in to Salesforce and accessed the Sales Script Manager module. Now, you're ready to manage and optimize your sales with True Call Scripts.

Navigating the Interface

Standard Objects

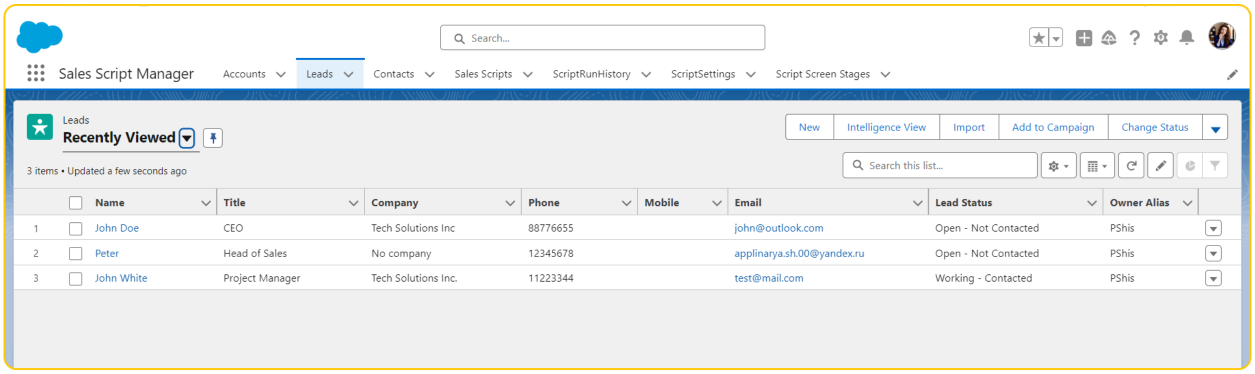
Accounts

- Description: This tab displays a list of all your accounts, allowing you to view and manage account details efficiently.
- Functionality: Access account information, link accounts to relevant sales scripts and track interactions.



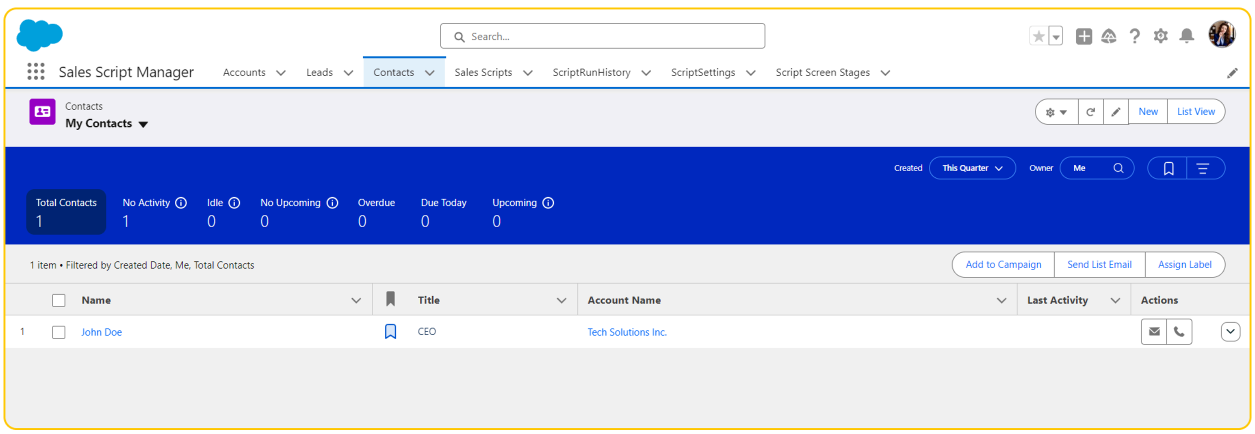
Leads

- Description: This tab shows a list of leads, helping you track and manage potential sales opportunities.
- Functionality: Monitor lead status, convert leads to opportunities, and associate leads with specific sales scripts.



Contacts

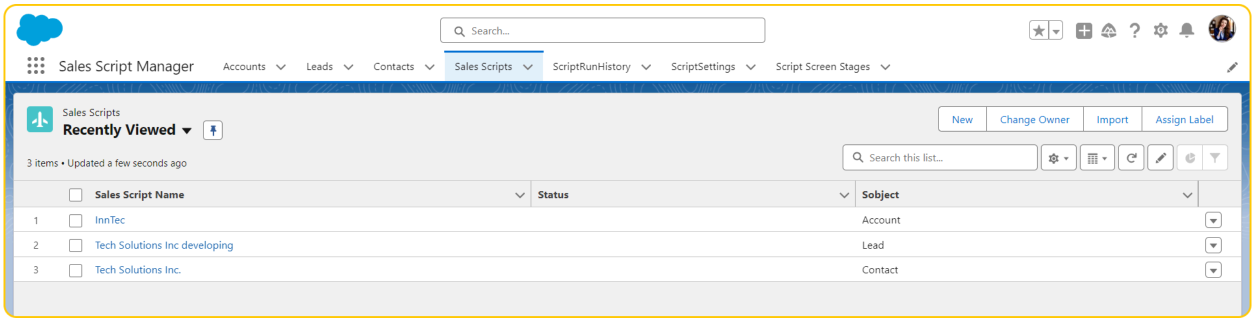
- Description: This tab contains a list of contacts, providing a centralized location for managing contact information.
- Functionality: Keep contact details updated, link contacts to accounts and leads, and ensure streamlined communication.



Custom Objects

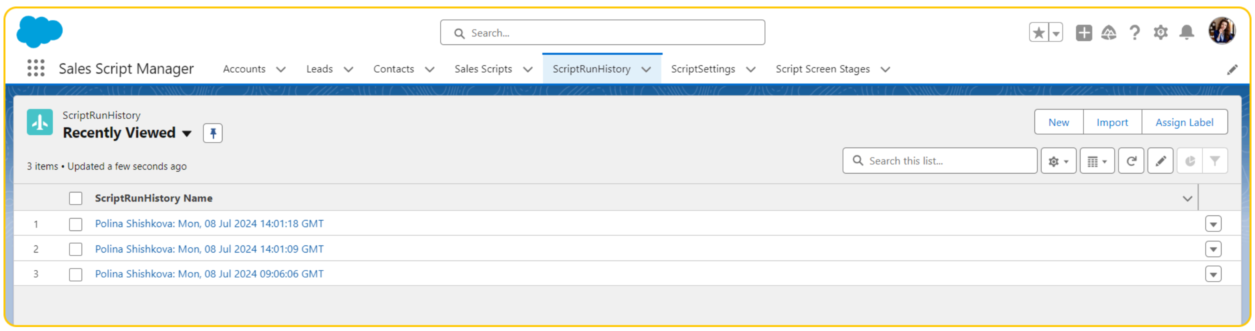
Sales Scripts

- Description: This tab displays a list of all created sales scripts, allowing for easy access and management.
- Functionality: Create new scripts, edit existing ones, organize scripts by category, and ensure your team has the tools they need for effective sales conversations.



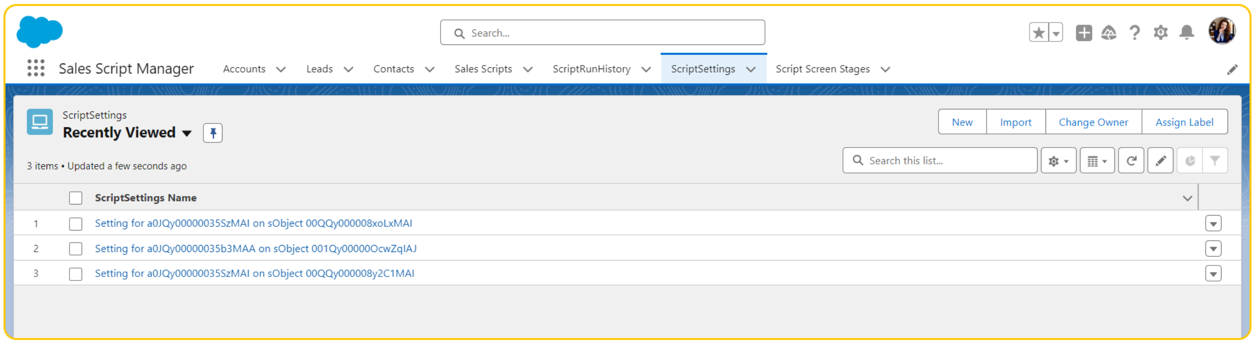
Script Run History

- Description: This tab shows a list of all script runs.
- Functionality: View detailed usage data, analyze performance metrics, and identify areas for improvement.



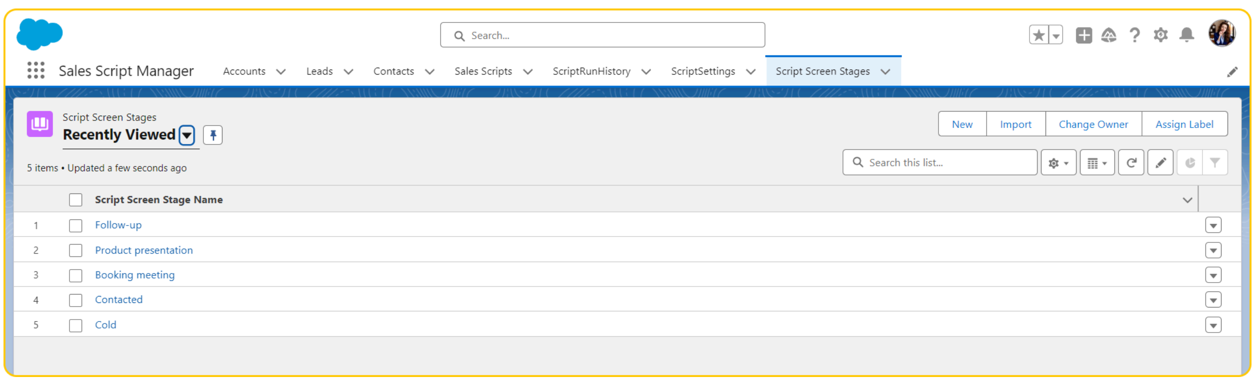
Script Settings

- Description: The Script Settings page is designed to ensure seamless integration and connectivity between sales scripts and standard Salesforce objects like Leads, Contacts, and Accounts.
- Functionality: This page allows users to verify and manage the connections, ensuring that scripts are appropriately linked to the correct data objects. When a user runs a script, these settings automatically facilitate the display of relevant connections between the components.



Script Screen Stages

- Description: This tab provides a list of stages that outline the progression of sales scripts.
- Functionality: Define different stages for your scripts, set up triggers and actions for each stage, and ensure a structured and efficient sales process.



Page Layout Setup

TrueCallScript support Account, Lead and Contact objects. Before start using the application, you need to set up Page Layout for each object.

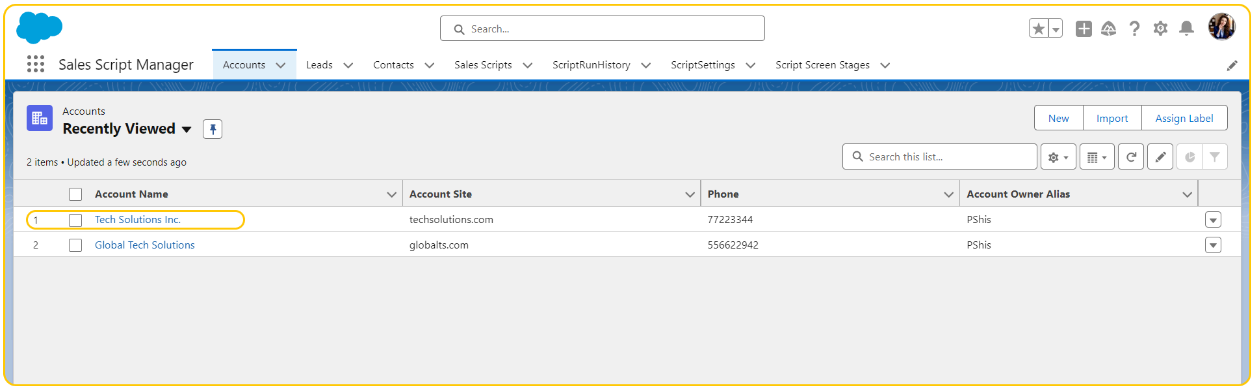
We will guide you through the Page Layout setup for Account object as an example. Other object layouts can be customized in the same way.

First, you need to add ScriptView component to accounts Tab:

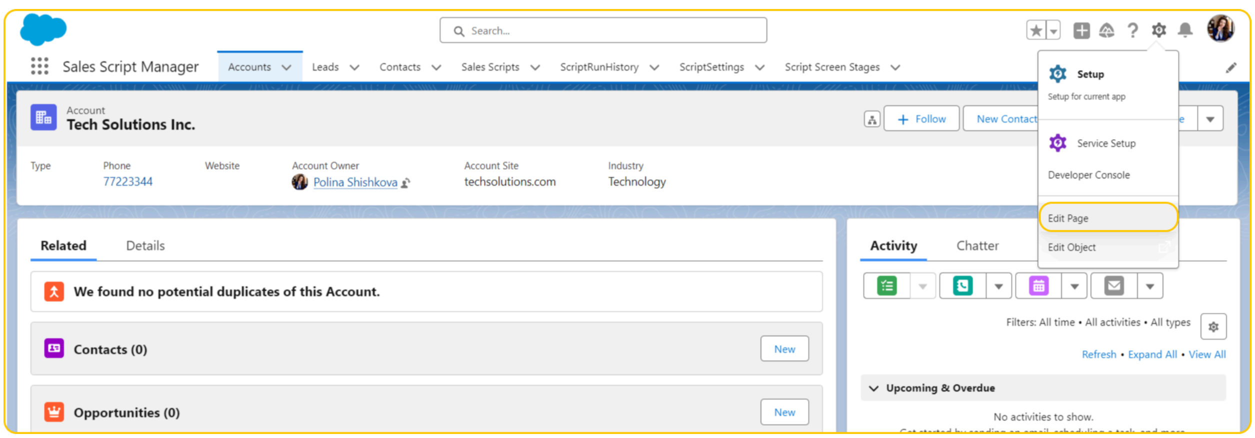
- To run your sales script, add the ScriptView component to the relevant page (Leads, Accounts, or Contacts).

Navigating to Page Settings:

- Go to the Account tab.
- Choose any account.

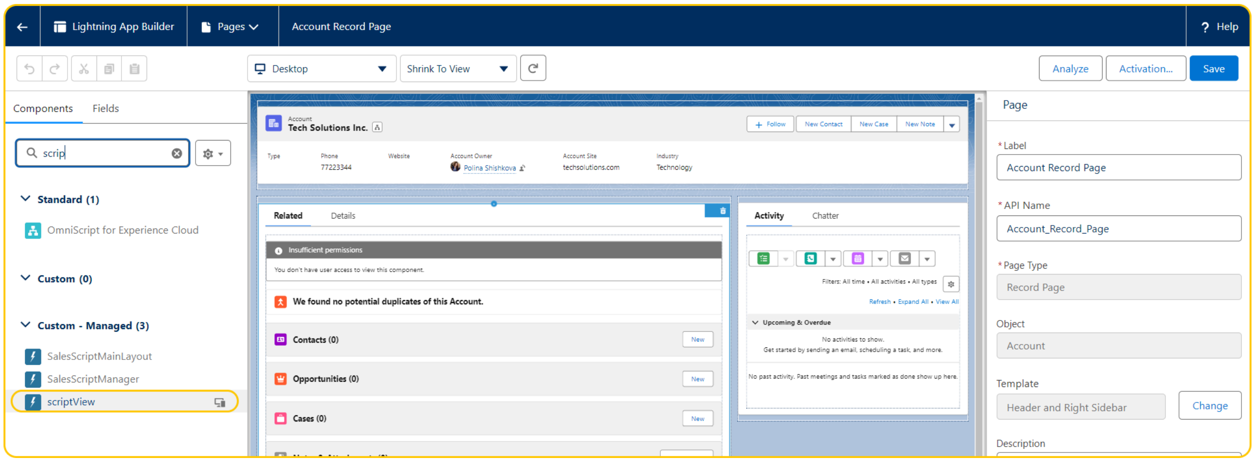


- On the account page, navigate to Settings.
- Select Edit Page to enter the Lightning App Builder.

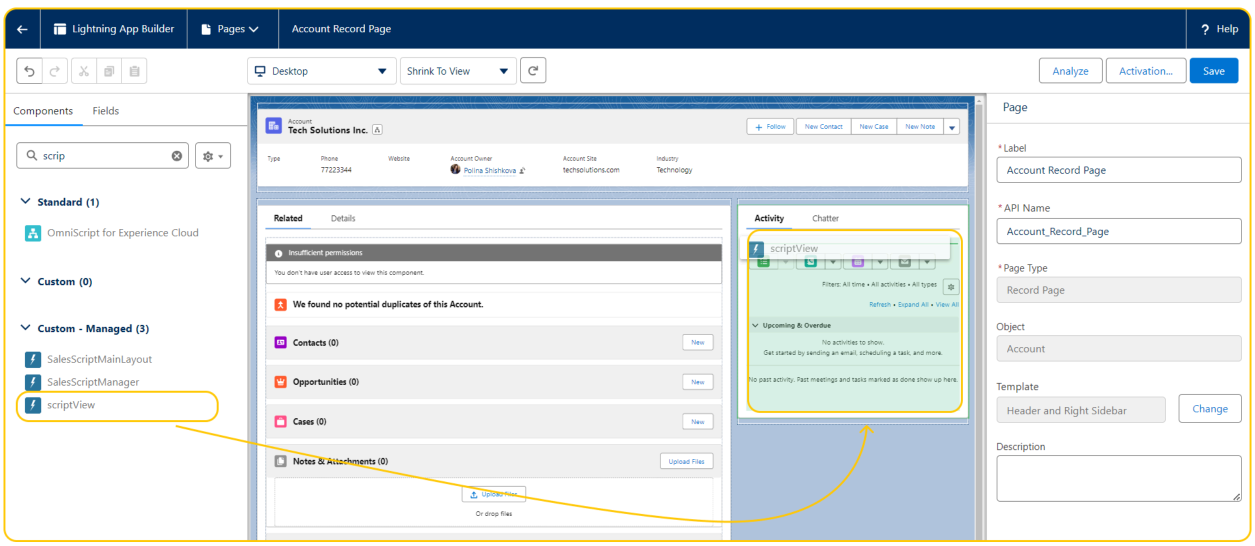


Adding ScriptView Component:

- In the Lightning App Builder, search for ScriptView in the component list.

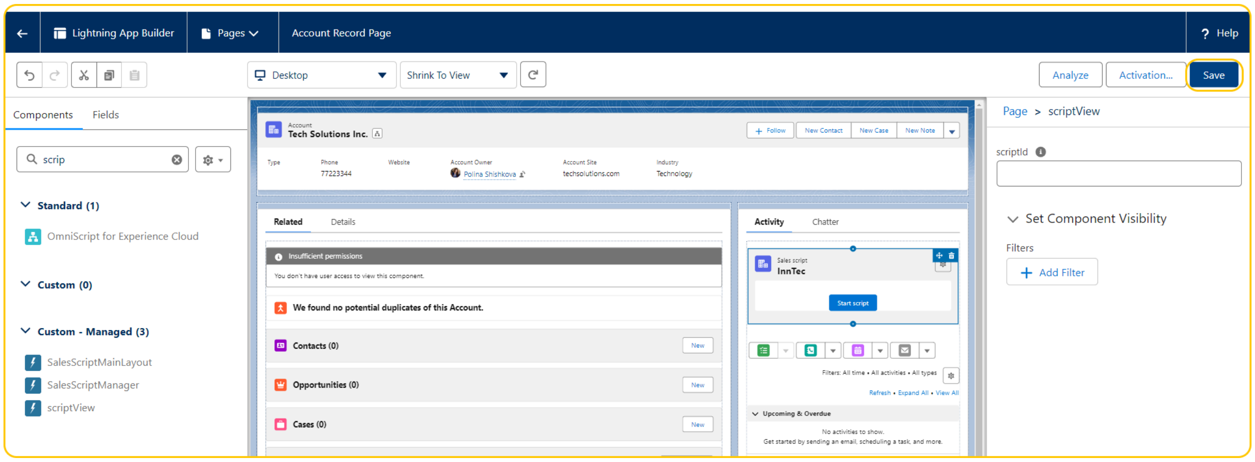


- Drag and drop the ScriptView component onto the desired section of the page.

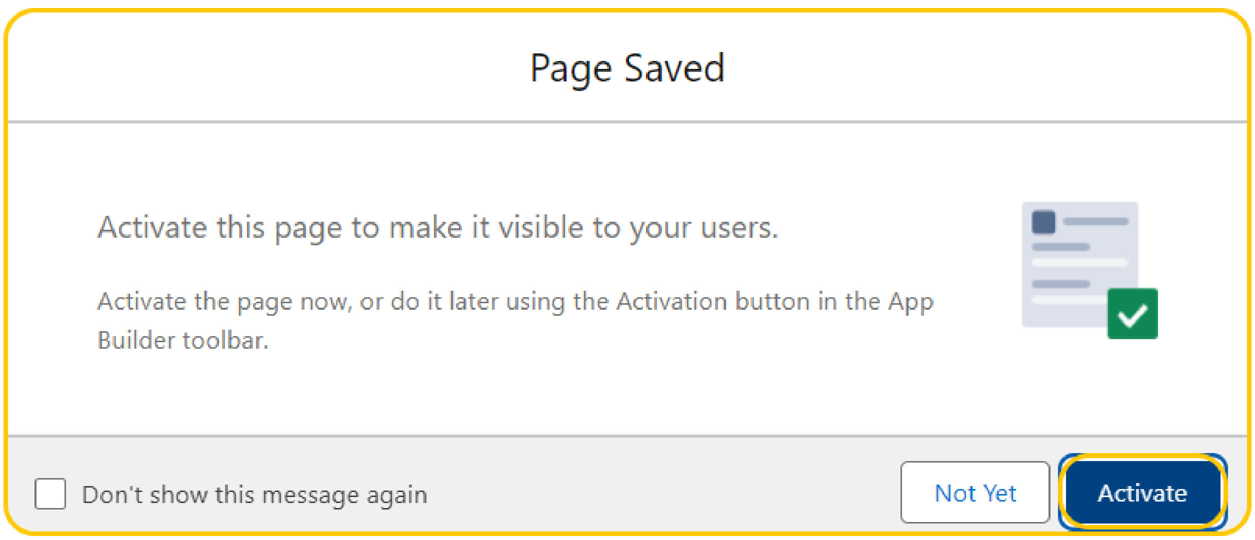


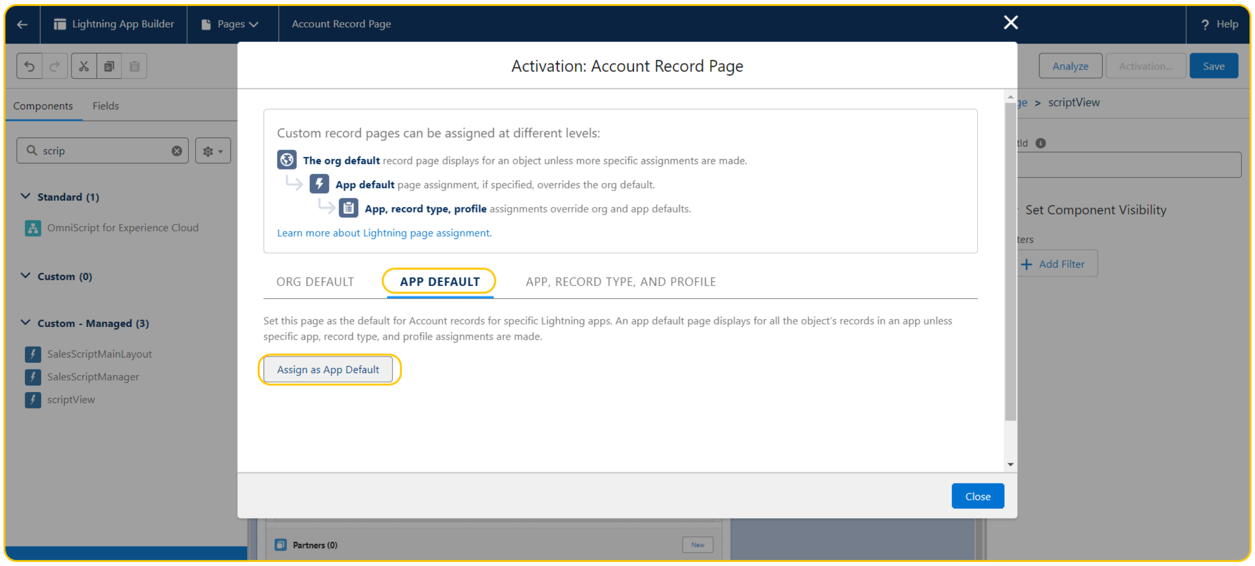
Saving and Activating the Component:

- Click Save to save your changes.

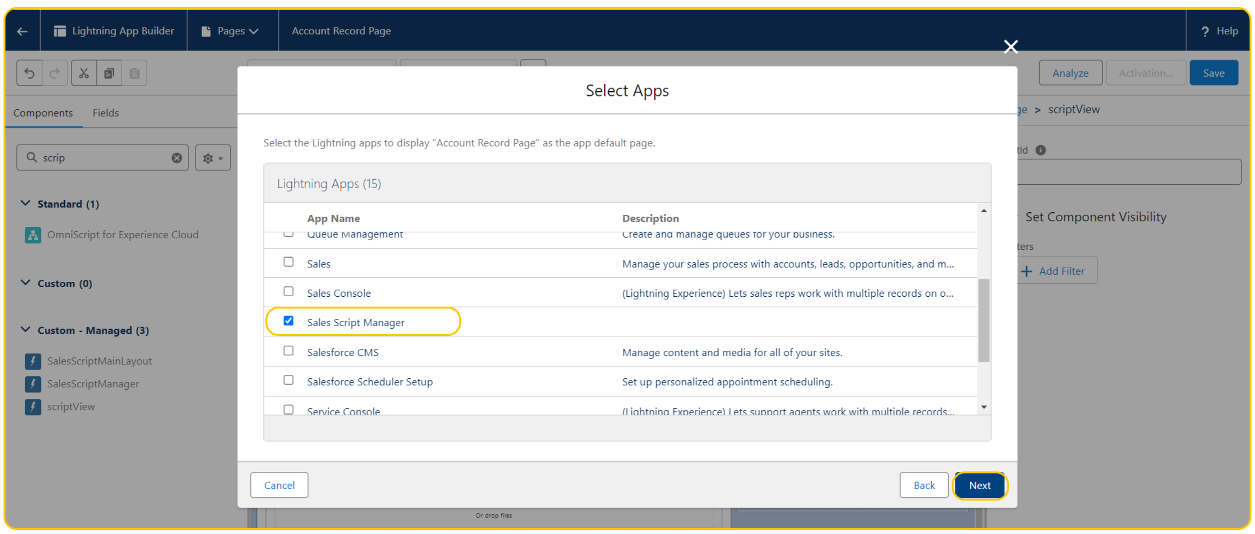


- Activate the page layout by selecting Activate and making it the app's default layout for your organization. This ensures that the ScriptView component will appear on the selected object page for all users.

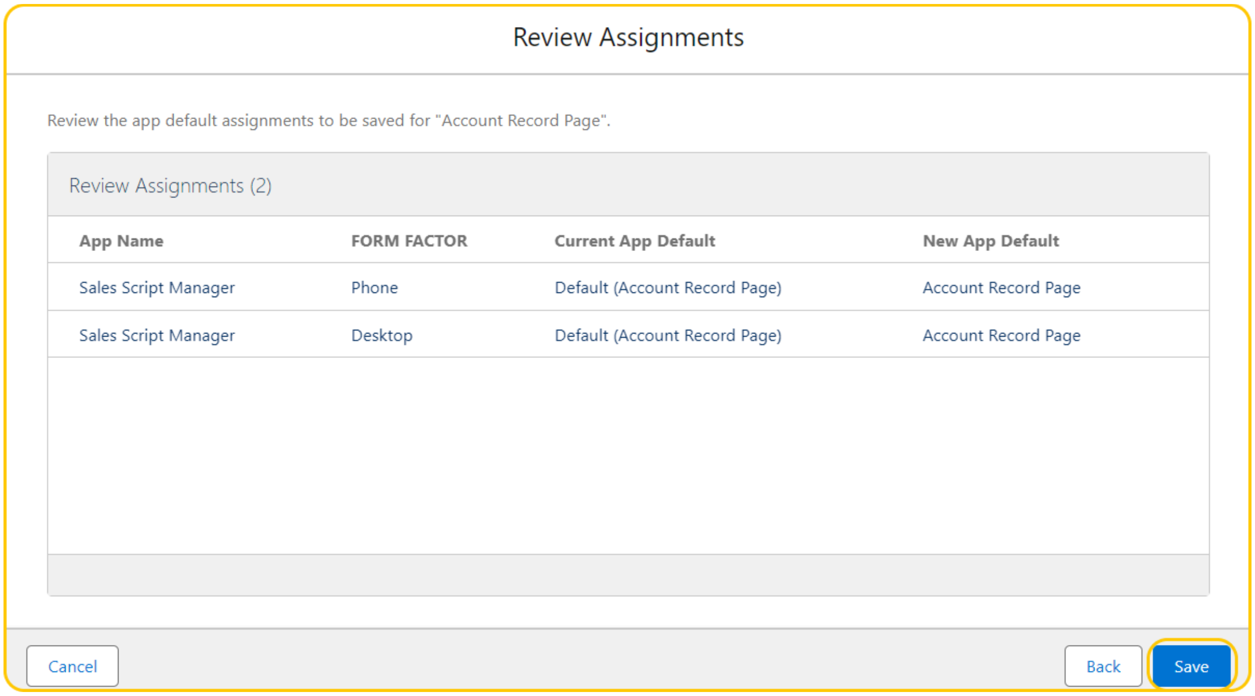




- Choose "Sales Script Manager" from the menu.
- Click "Next"

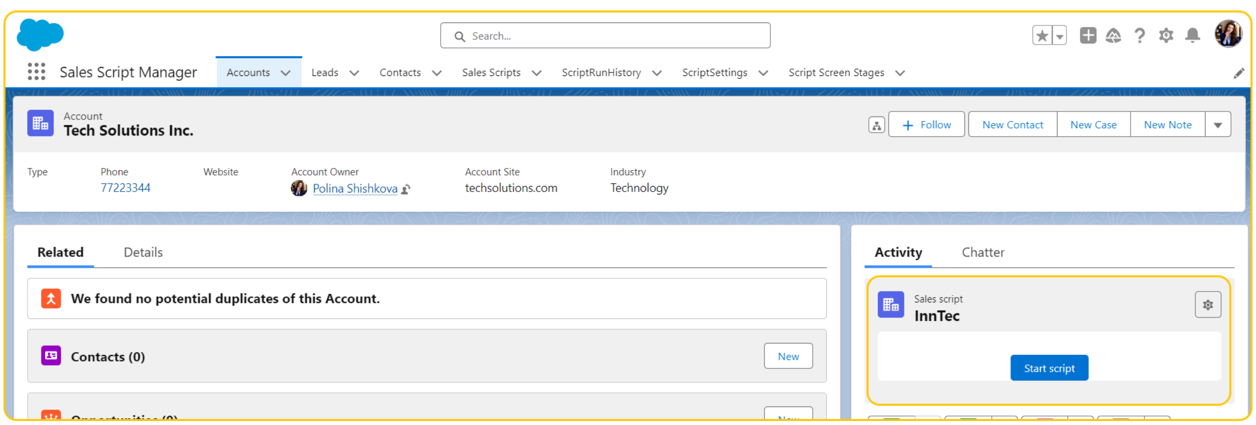


- Review and save



Configuring the ScriptView Component:

- Once the ScriptView component is added and the page is activated, you will be able to run scripts directly from the necessary page.



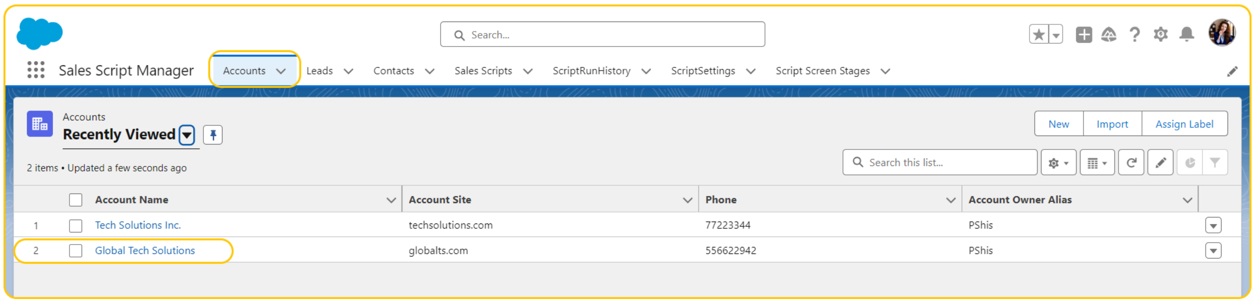
Adding Sales Script History to Layouts

Enhance your Salesforce experience by adding a dynamic related list of script runs to your account, contact, or lead layout. This allows you to view the history of scripts used with a specific person directly on their page.

Steps to Add Script Run History:

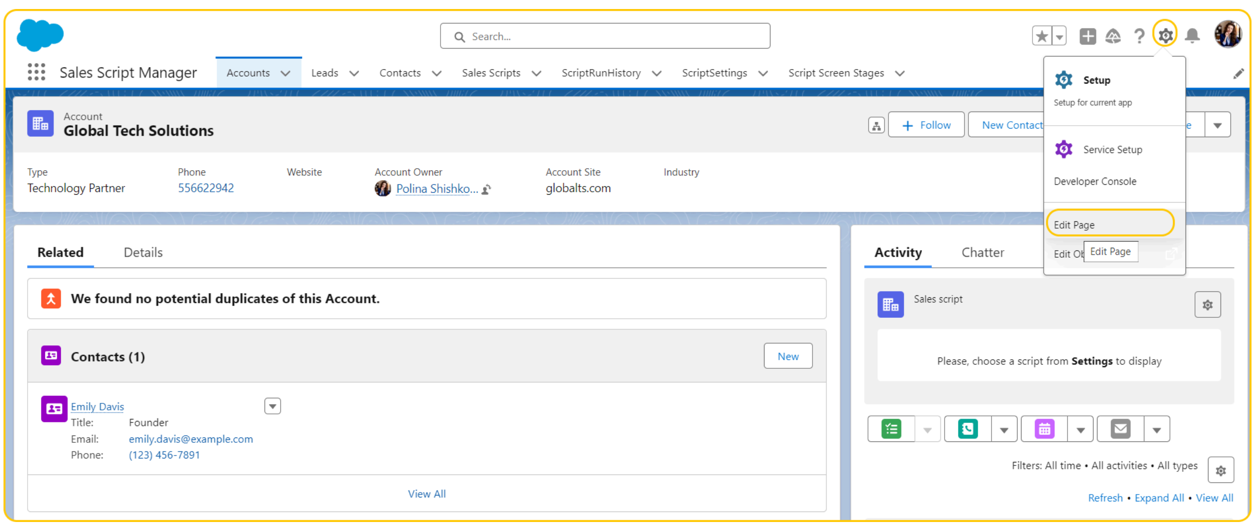
Choose Accounts Tab:

- Navigate to the accounts tab and choose any account you want to add the history to.



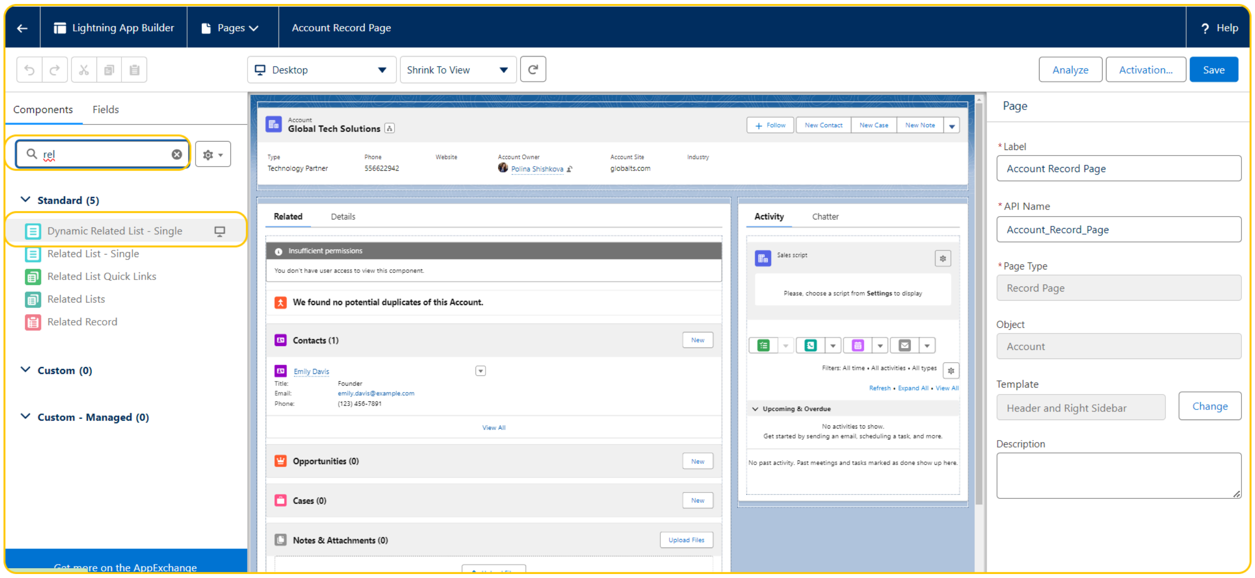
Access Page Settings:

- Click on the settings gear icon.
- Select "Edit Page" from the dropdown menu.

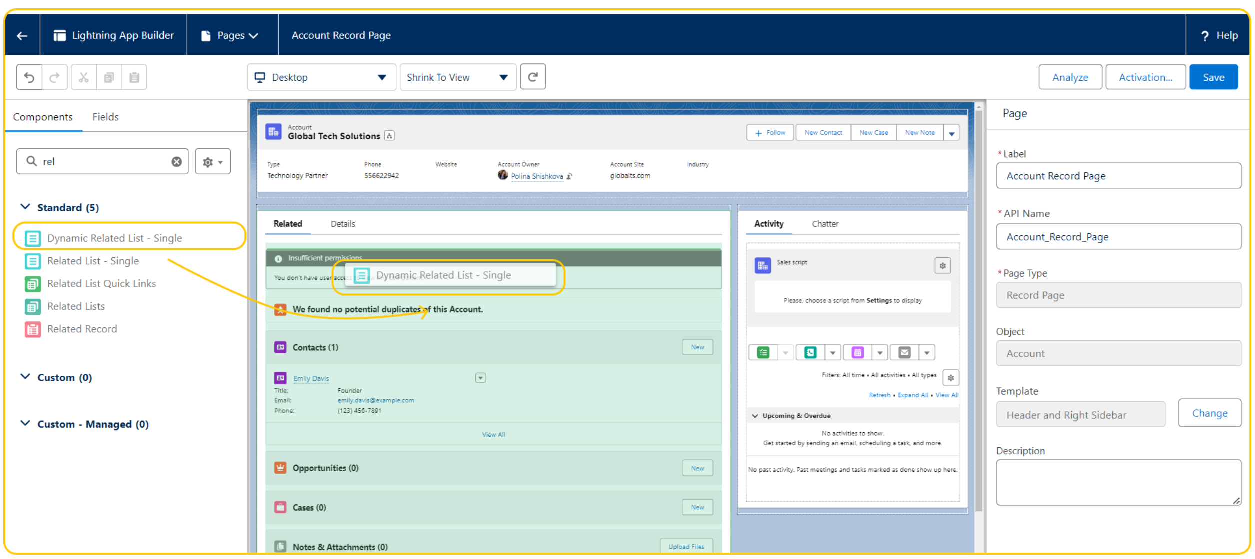


Add Dynamic Related List:

- In the page editor, search for "Dynamic Related List" in the component menu.

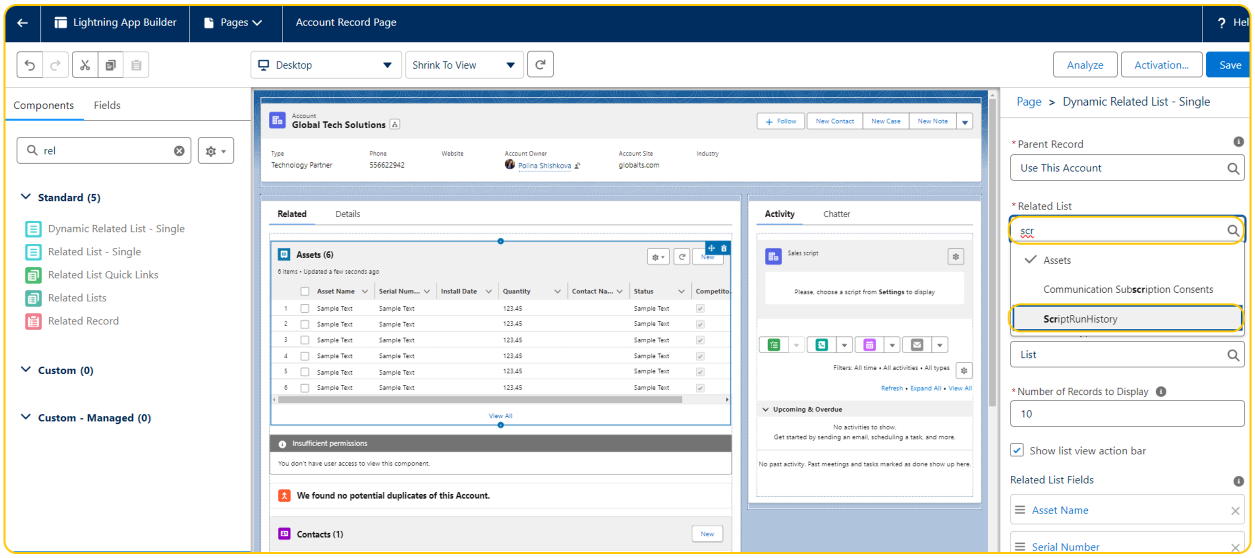


- Drag and drop the Dynamic Related List component onto the desired section of the page.



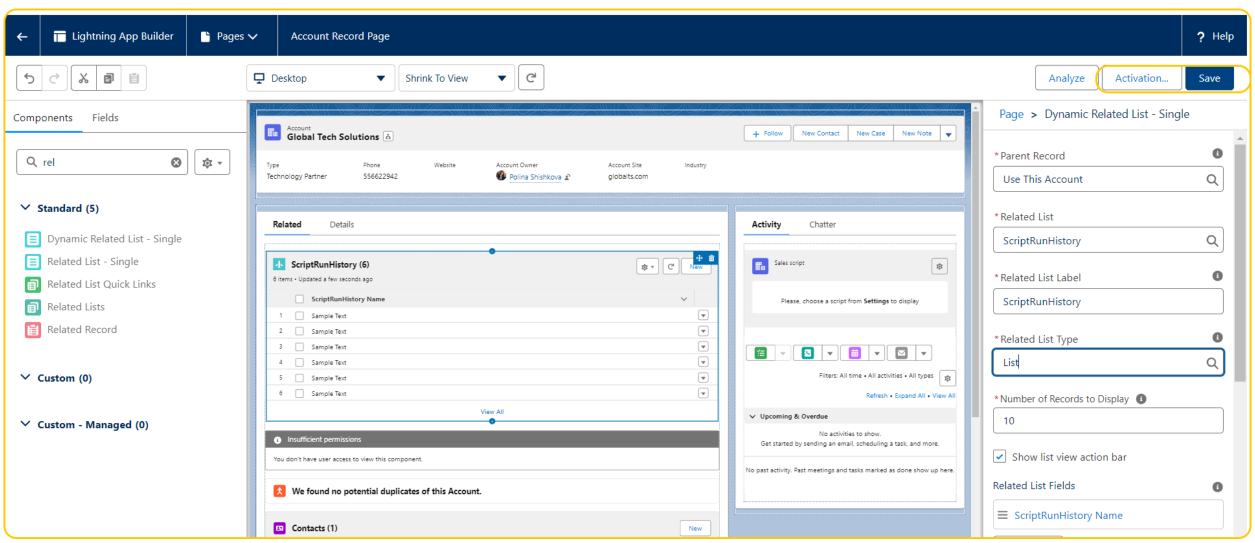
Specify Dynamic List:

- Click on the added Dynamic Related List component to open its settings.
- In the Related List dropdown, select "ScriptRunHistory."

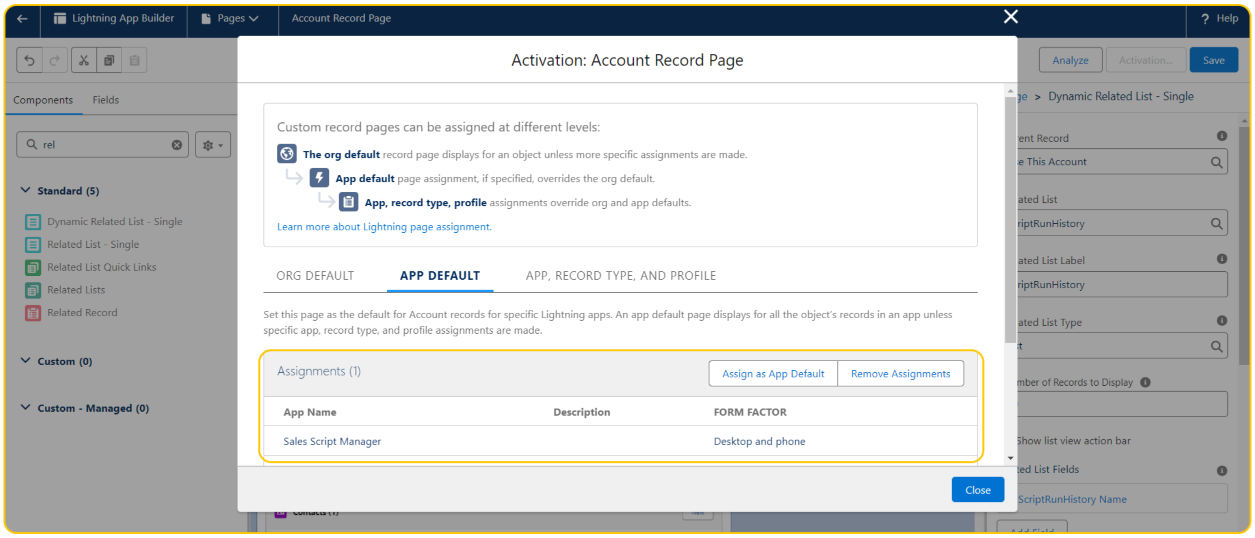


Save and Activate:

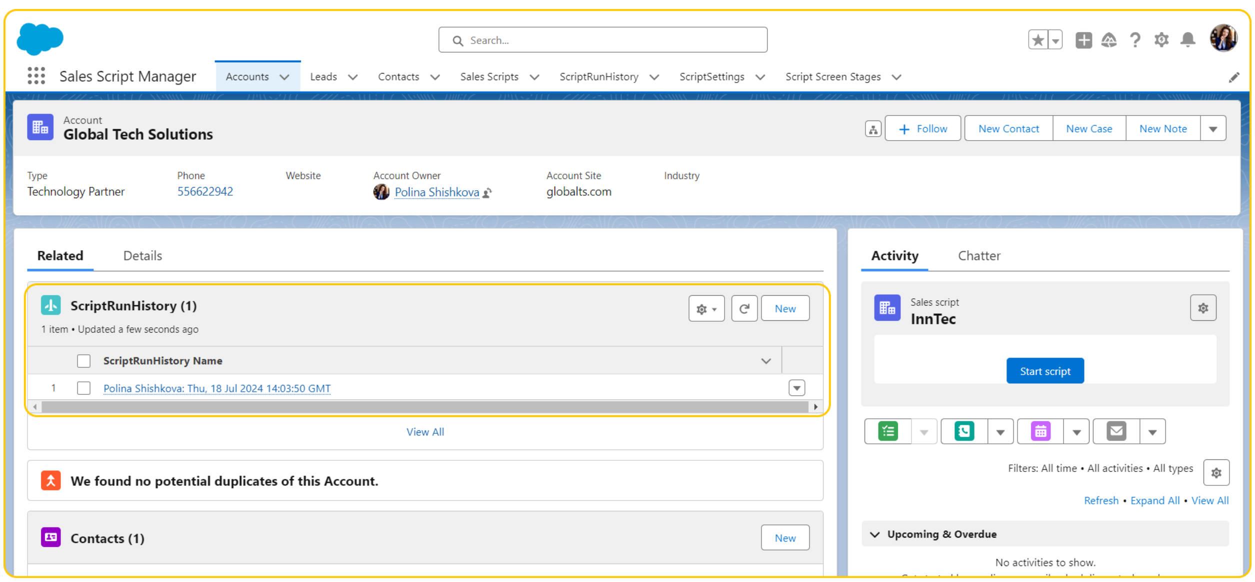
- Save the changes.



- Activate the new layout as the default.



- Once added, the Script Run History related to the specific object (Lead, Account, or Contact) will be displayed directly on the page. This provides an easy way to view the script history and comments for a particular person.



Main Functionality

Script Screen Stages Tab

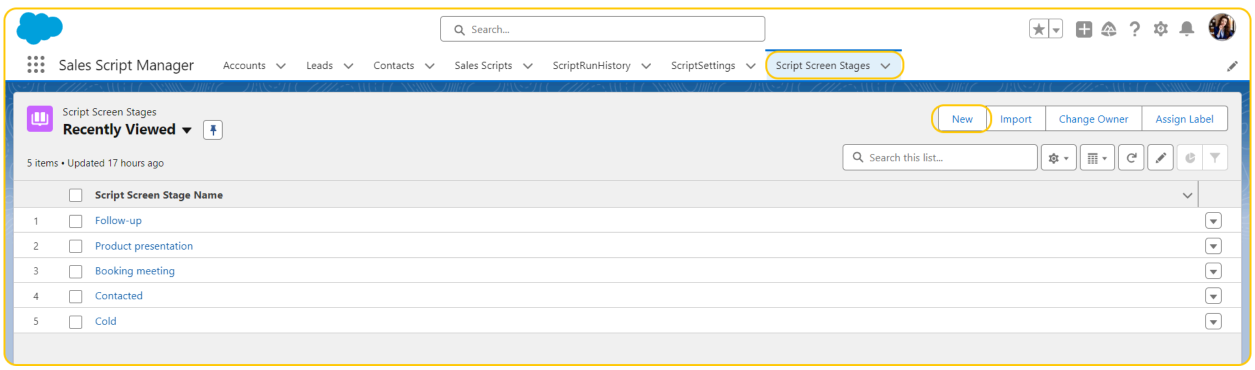
The Script Screen Stages tab is crucial for setting up and organizing the stages of your sales scripts. These stages define each step of the sales process, ensuring a clear and structured flow. Setting up stages first allows for consistent and reusable steps across multiple scripts, enhancing efficiency and standardization.

Accessing the Tab:

- Navigate to the "Script Screen Stages" tab.

Creating a New Stage:

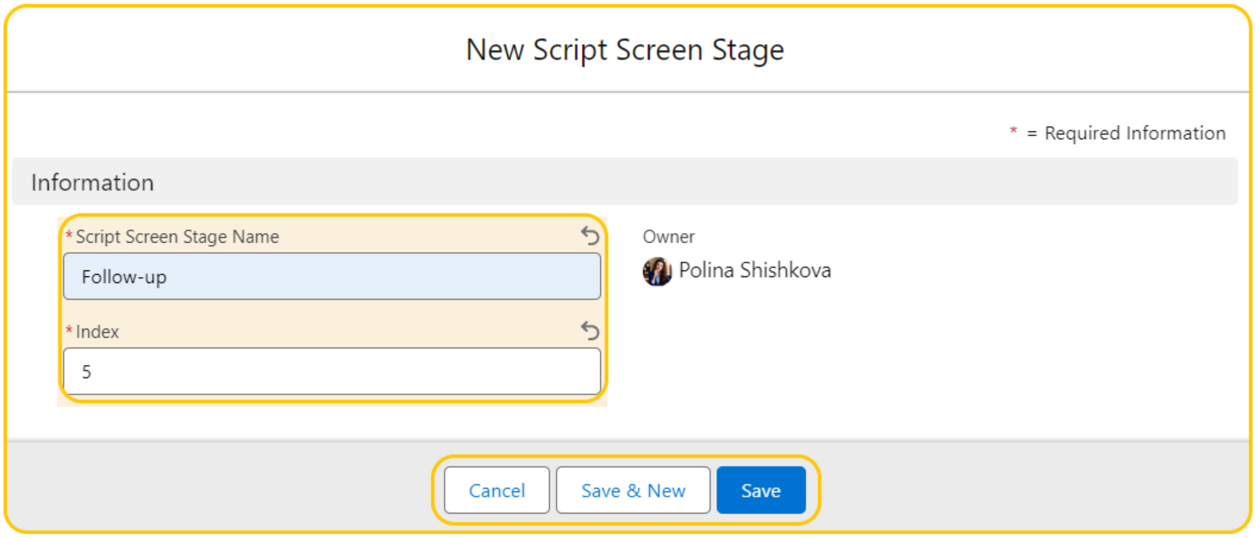
- Click on the "New" button to create a new stage.



Fill in the necessary details for the stage:

- Stage Name: A clear and descriptive name for the stage.
- Index: The position where this stage will appear in the sequence.

Click "Save" to add the new stage.



Managing Stages:

- View the list of existing stages on the Script Screen Stages tab.
- Select a stage to edit its details or delete it if no longer needed.
- Reorder stages by adjusting their index to control their sequence.

Using Stages in Sales Scripts:

- Once stages are set up, we are free to create a sales script

Sales Scripts Tab

Note: you are free to create 5 scripts and 5 steps in each script in the application.

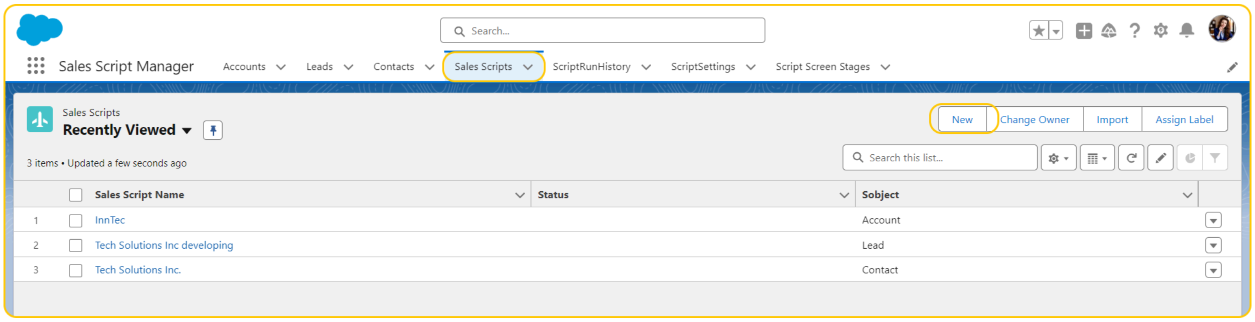
The Sales Scripts tab is where you create and manage your sales scripts. These scripts are structured guides to help your sales team navigate conversations with leads, accounts, and contacts. By setting up detailed scripts, you ensure consistent and effective communication across your team.

Let's create it together

Accessing the Tab:

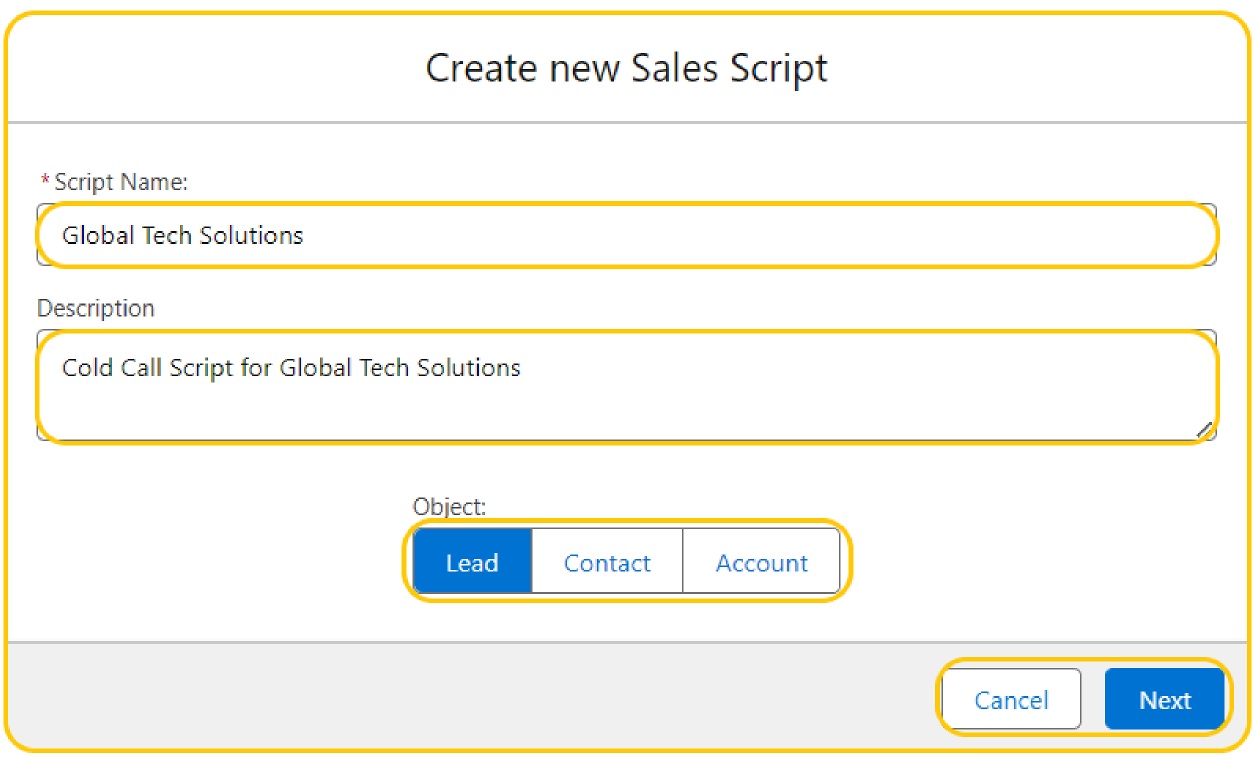
- Navigate to the "Sales Scripts" tab.

- Click on the "New" button to create a new sales script.



Creating a New Script:

- Specify Script Name and Description: Enter a clear and descriptive name and a brief script description.
- Choose an Object: Select the object (Lead, Account, Contact) that the script will be connected with. This ensures that the script will appear in the chosen object.
- Click "Next" to create the script. You will be redirected to the sales script edition window for further customization.



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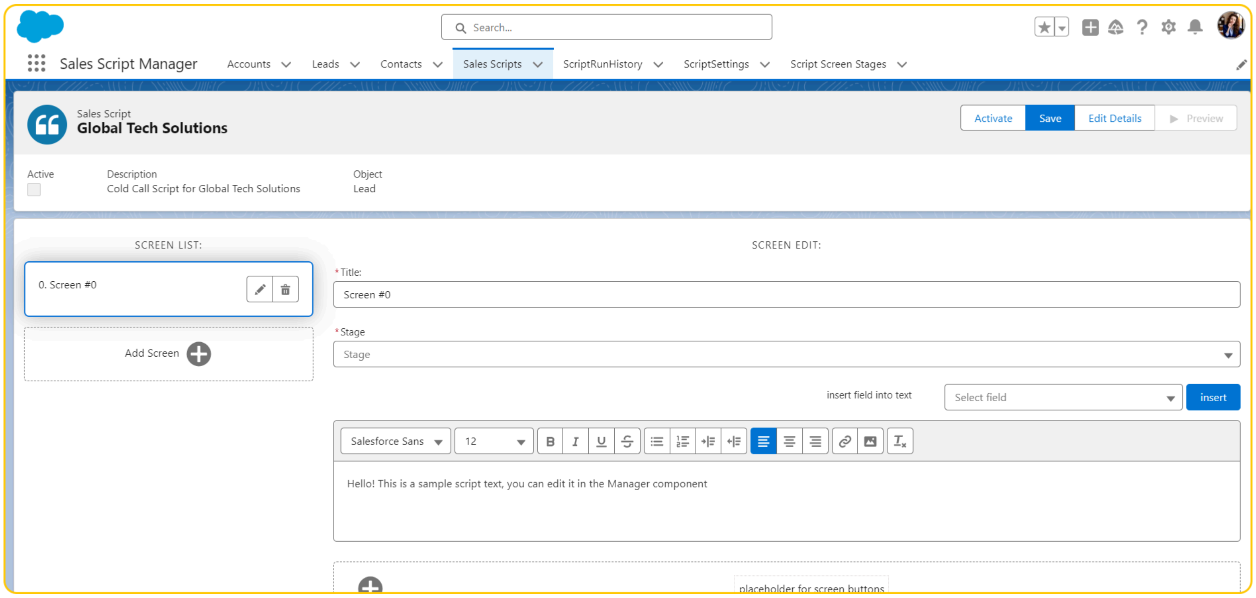


Here you'll find several control buttons for managing and configuring your scripts:

Save:

- Click this button to save any changes made to the script details, stages, or settings.

Activate:

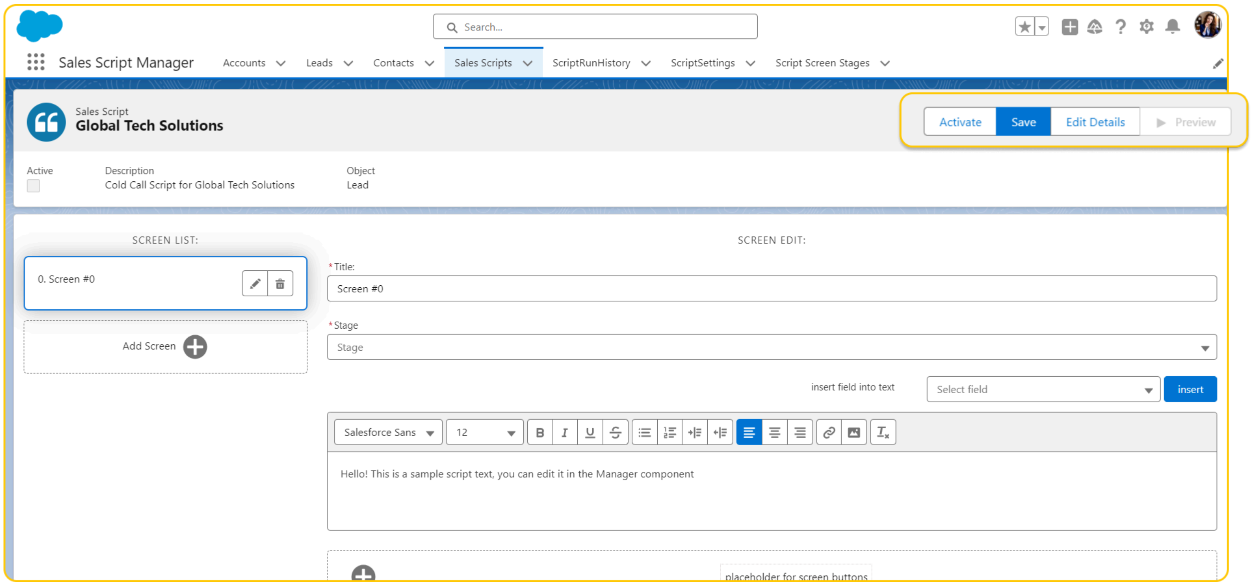
- Use this button to change the Script Status. Only Active scripts can be started and used in sales interactions.

Edit Details:

- Clicking this button opens a form where you can modify script details such as Name, Description, and other settings.

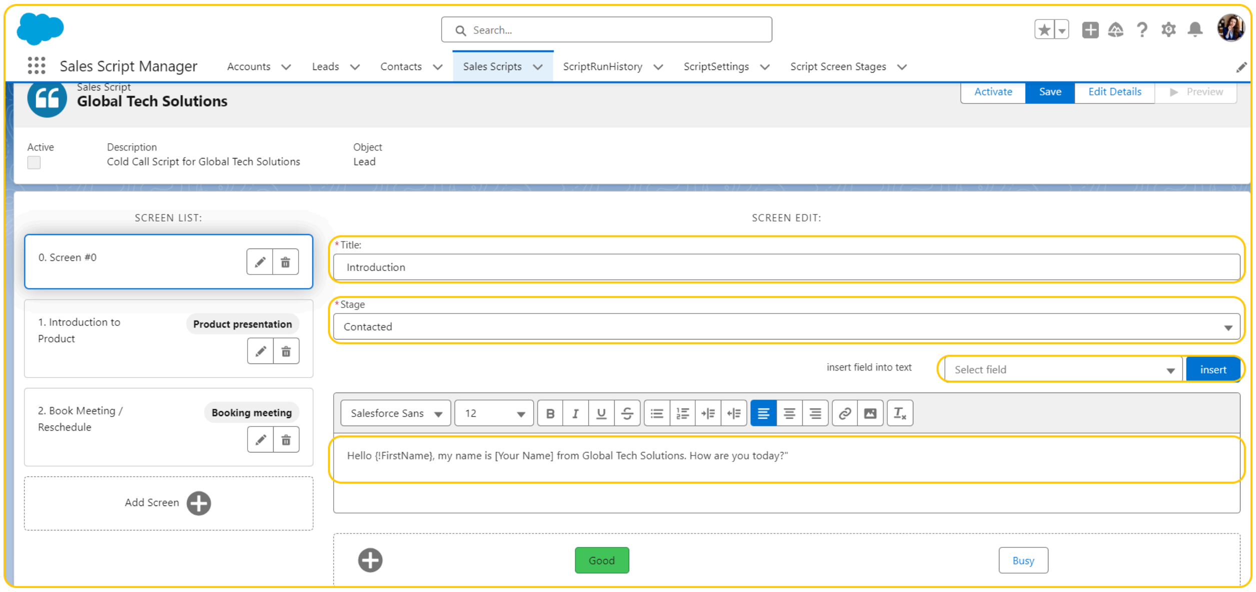
Preview:

- This button allows you to preview changes made to the script. It is available only for Active scripts, enabling you to review how the script will appear and function before it is used.



Editing the Script:

- Title: Add a title for the screen to provide context for the step.
- Stage: Choose a stage from the predefined stages set up in the Script Screen Stages tab.
- Text Field: Insert the text that will guide the user through this step.
- Insert Field into Text: Use merge fields to personalize the script (e.g., inserting the first name of the lead).

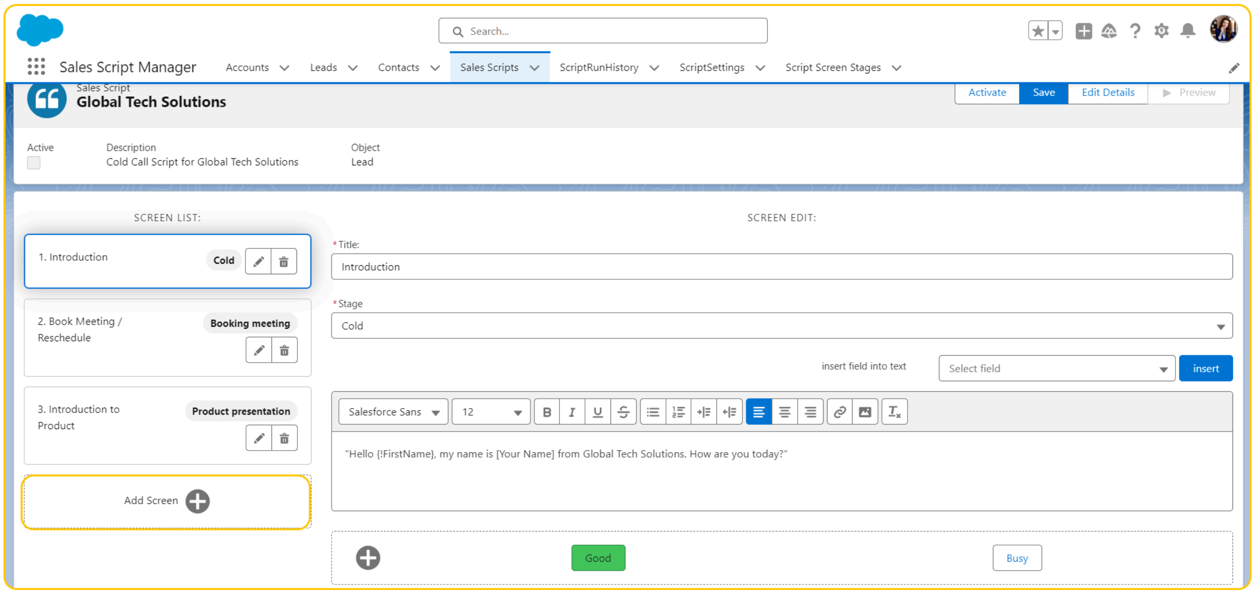


Screen list:

In the Sales Script page, the Screen List Window is where you manage all the screens associated with your script. Here's how to navigate and use this feature:

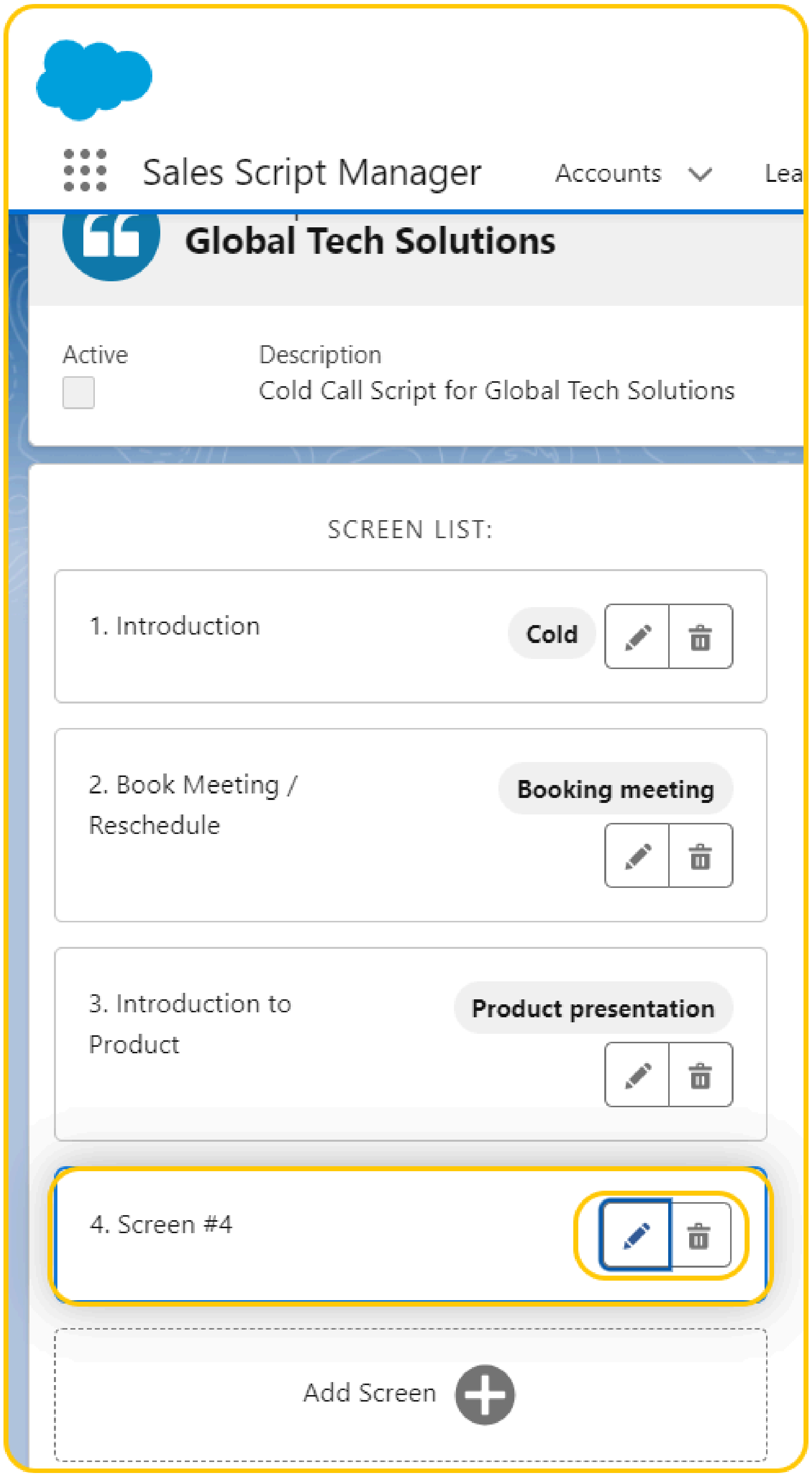
Adding Screens:

- Click on the + button to add a new screen.
- A new screen will be automatically created, and you will need to specify the details.



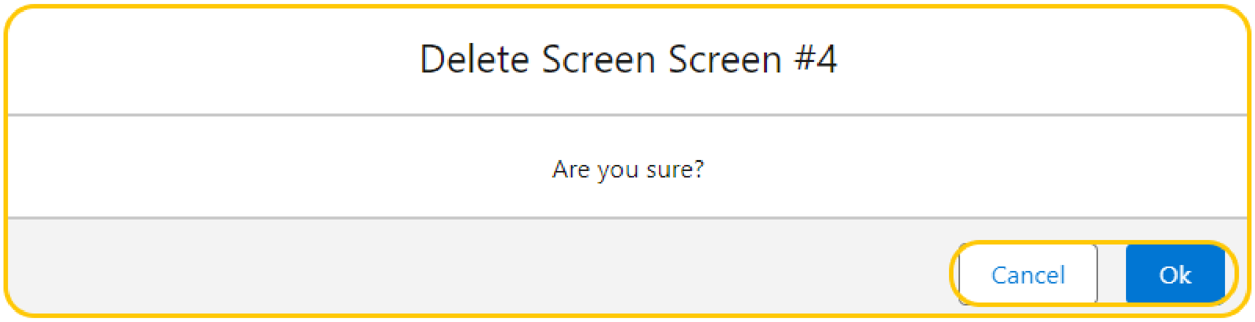
Editing Screens:

- In the Screen List Window, you can see all the screens associated with your script.
- To edit a screen, click the Edit button next to the screen name.
- Update the necessary details and save your changes.



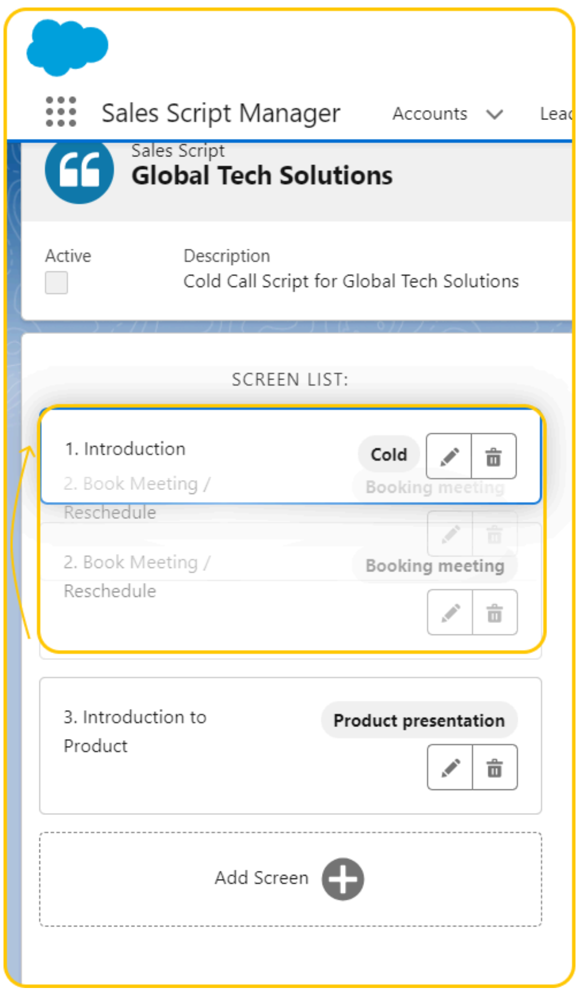
Deleting Screens:

- To delete a screen, click the Delete button next to the screen name.
- Confirm the deletion to remove the screen from your script.



Managing Screen Order:

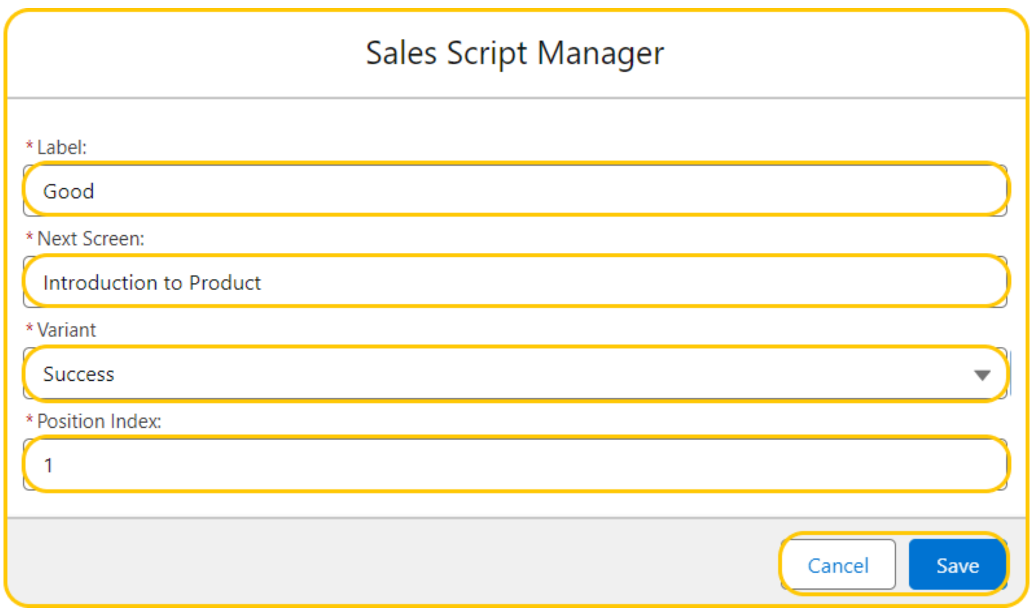
- You can change the order of the screens by dragging and dropping them within the Screen List Window.
- This helps organize your script's flow according to your sales process.



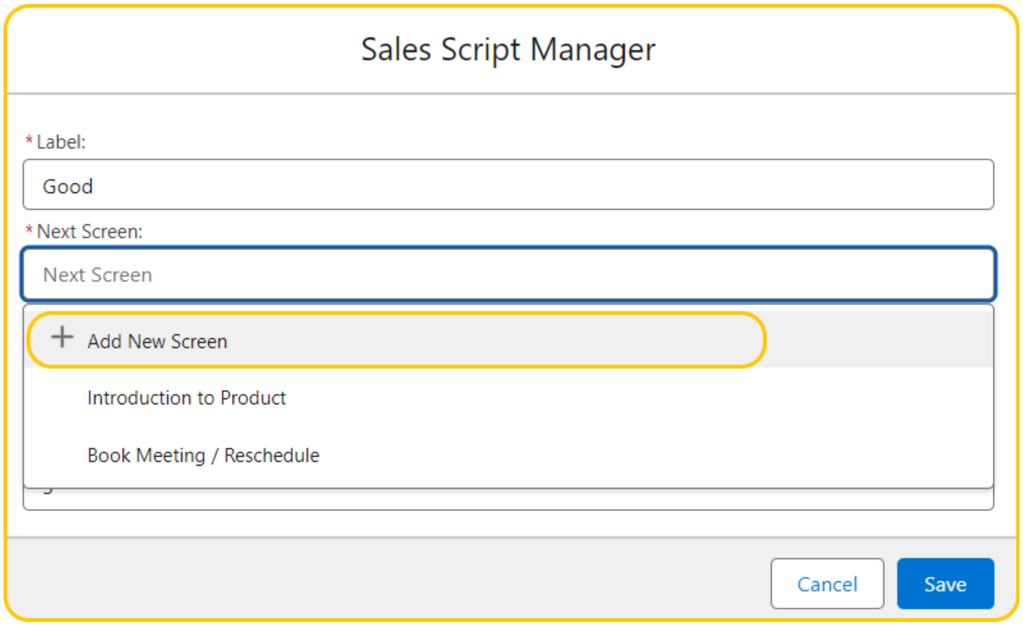
Adding Buttons with Customer Answers:

- Click on the "+" button to add a new button with a possible customer answer.

- Specify Button Details:
- Label: Enter the text for the possible customer answer.



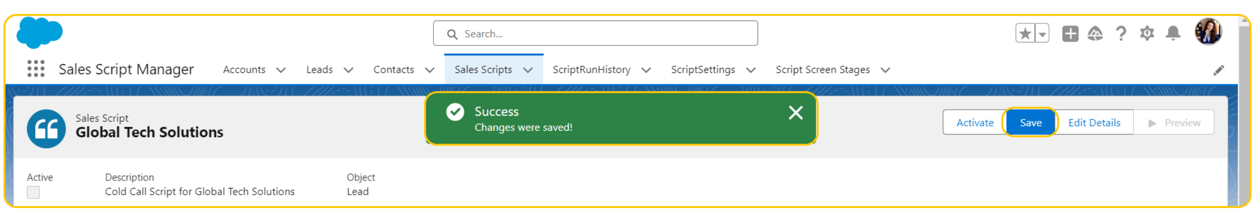
- Next Screen: Choose the screen that the user will be redirected to upon selecting this answer. If you don't have a next screen yet, you can create it directly from that window by clicking on the plus icon from the dropdown menu.



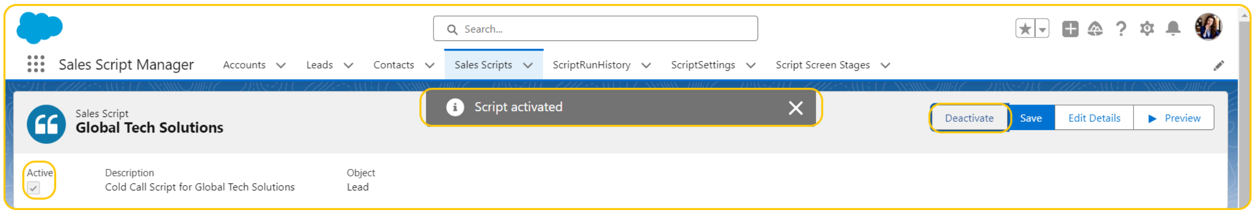
- Variant: Select the button style (e.g., Neutral, Brand, Brand Outline, Destructive, Inverse, Success).
- Position Index: Set the position of this button on the screen.
- Save the button. It will appear in the buttons field.

Finalizing the Script:

- After making all necessary changes, click "Save" to save the script.



- To activate the script, click on the "Activate" button. Only active scripts can be used in real sales interactions.

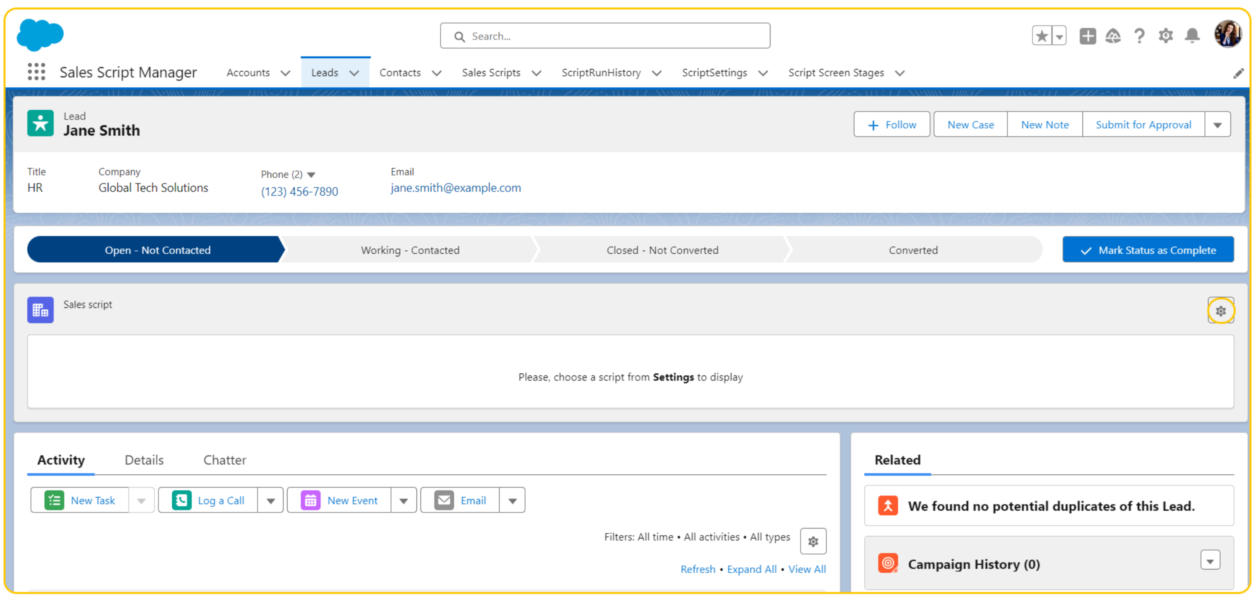


Running and Managing Sales Scripts

- To run your sales script, add the ScriptView component to the relevant page (Leads, Accounts, or Contacts).

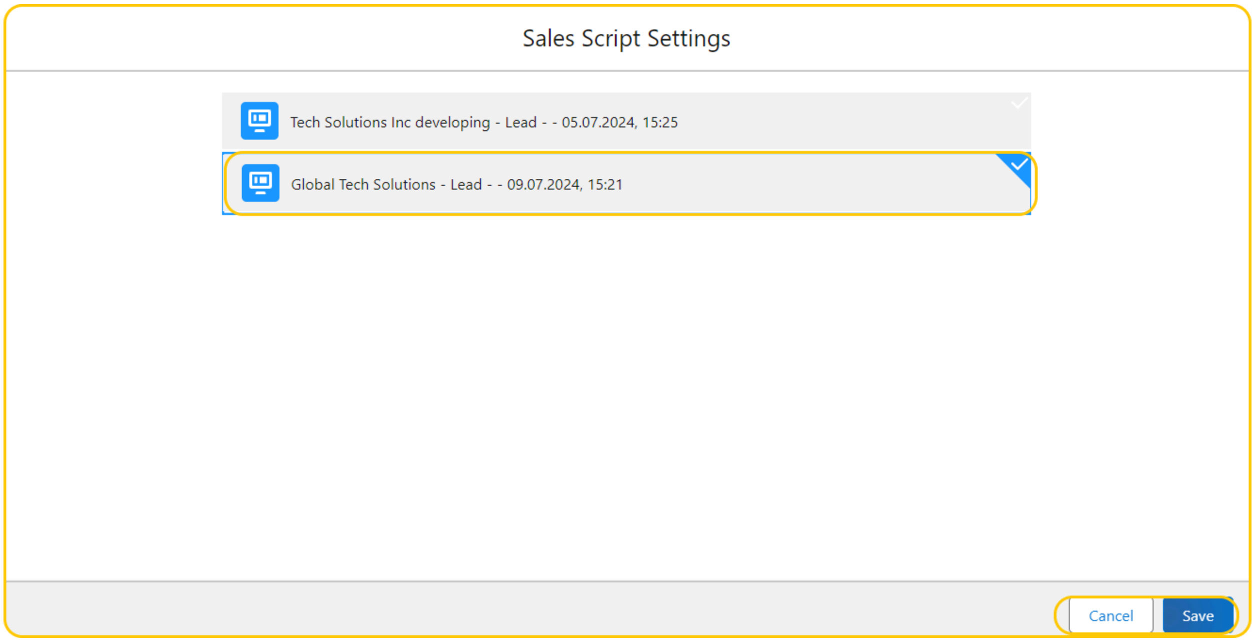
Configuring the ScriptView Component:

- Once the ScriptView component is added and the page is activated, navigate to the relevant page (Leads, Accounts, or Contacts).
- Click on the Settings icon within the ScriptView component.



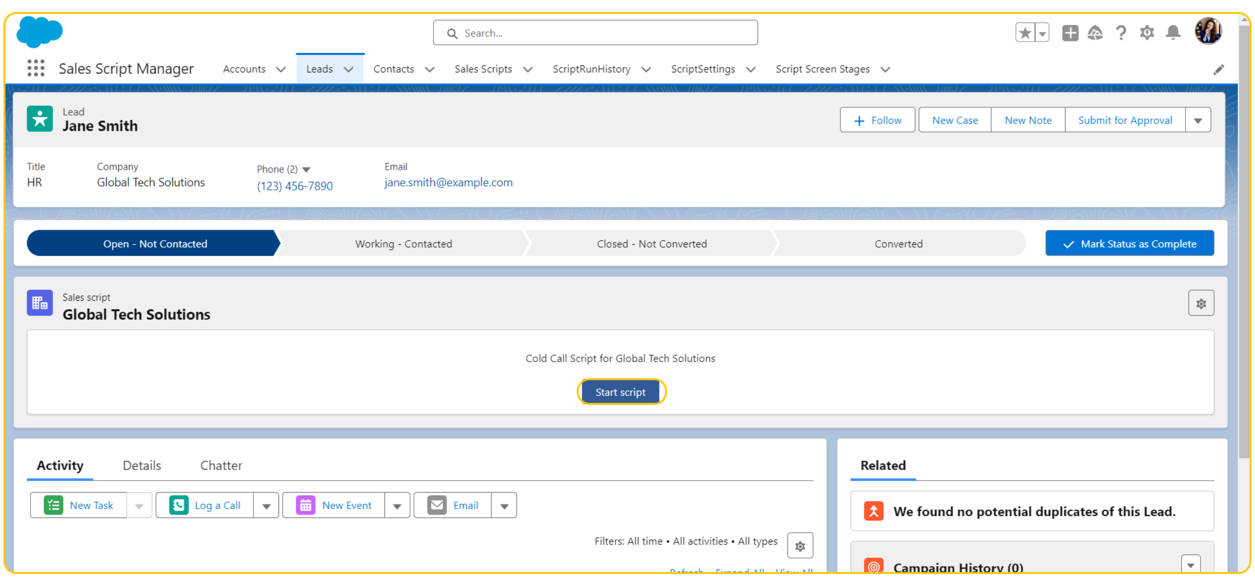
Choosing a Script:

- From the settings menu, select the desired script that corresponds to the object (Lead, Account, or Contact) currently being viewed.
- This script will now be available for execution directly from the page.



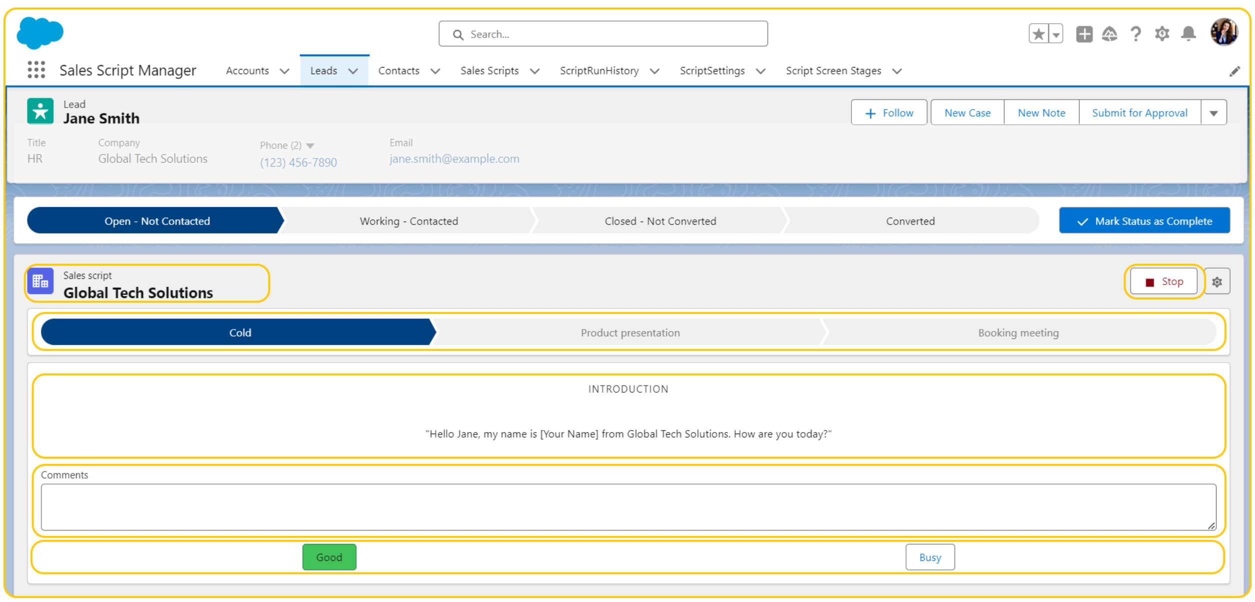
Running the Script:

- To start using the script, click the Start Script button within the ScriptView component.
- The script will guide the user through each predefined stage, displaying the relevant screens and prompts based on the script configuration.



When running the script, you will see the following controls:

- Script Name: Displays the name of the currently running script for reference.
- Script Stages: Shows the stages of the script, guiding the user through each step of the sales process.
- Control Buttons: Here you can stop the script.
- Current Screen Info: Provides text which user needs to use at that step.
- Comment: Allows users to add comments or notes during the script execution, which are saved for future reference.
- Screen Buttons: Displays buttons defined within the script for customer responses or actions, helping to progress through the script flow.



Note: Every script run is logged, and all comments are saved in Script Run History.

Script Run History Tab

Note: Maximum number of history count 100.

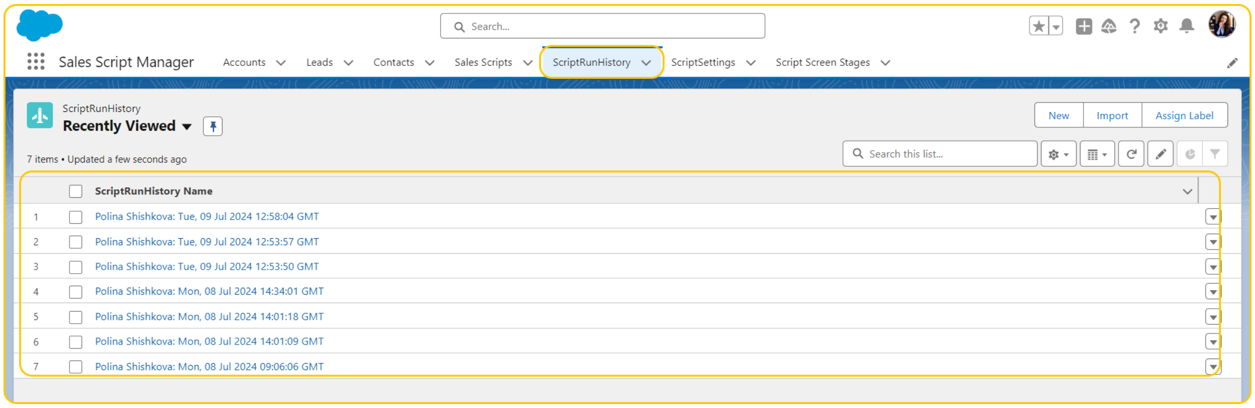
This tab lists all script runs, offering insights into usage and effectiveness.

Accessing the Script Run History Tab:

- Navigate to the Script Run History tab in the Sales Scripts Application.

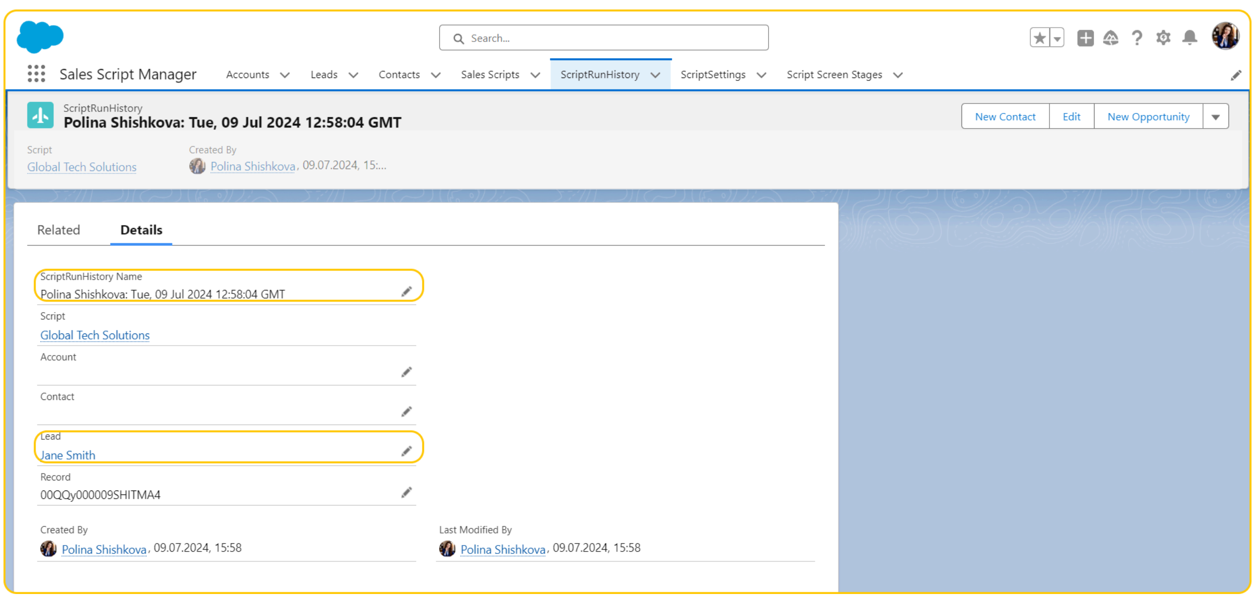
Selecting a Script:

- Choose a script from the list to review its execution history.



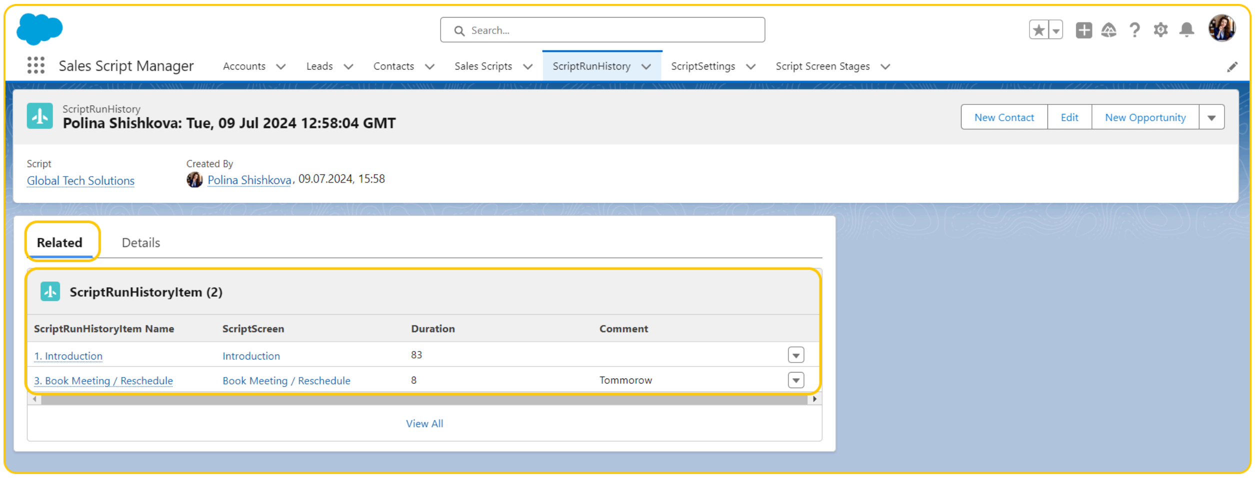
Viewing Details:

- See which lead the script was executed with.
- Identify who initiated the script and when it was run.



Reviewing Steps:

- Navigate to the related tab to view the comments and steps completed during the script execution.



Restrictions

Please note that our current system has some limitations:

- Maximum of 5 scripts can be created.
- Each script can have up to 5 steps.
- Only 100 records in the script run history.

If you need to increase these limits, please contact us at help@truesolv.com for more information and options to upgrade your plan.

Creating Effective Sales Scripts

Creating an effective sales script is essential for guiding your sales team through successful conversations with potential customers. By focusing on key elements, you can ensure your scripts are clear, targeted, and adaptable. Here are the five most important tips to consider when creating your sales scripts:

Define Clear Objectives:

- Know what you want to achieve with each script (e.g., booking a meeting, closing a sale).

Understand Your Audience:

- Tailor scripts to the specific needs and pain points of your target audience.

Keep It Concise and Clear:

- Use simple language and short sentences to maintain clarity and avoid confusion.

Anticipate Objections:

- Prepare responses for common objections or questions customers might have.

Test and Refine:

- Regularly review and update scripts based on feedback and performance.

By focusing on these key tips, you can create sales scripts that are effective, targeted, and adaptable to various sales scenarios, helping your team achieve better results.

Contact Us

Need Help or Have Questions?

Have a question about our TrueCallScript or experiencing an issue? Don't hesitate to reach out! Our dedicated support team is here to assist you every step of the way. Whether you require guidance on using a feature, encounter a technical issue, or simply want to share your feedback, we're just an email away.

Contact us anytime at help@truesolv.com, and we'll get back to you as soon as possible. Your satisfaction is our top priority, and we're committed to ensuring that you have a seamless experience with our TrueCallScript.

Thank you for choosing TrueCallScript! We look forward to assisting you!

TrueSolv team.