

6SENSE PIPELINE ANALYTICS

INSTALLATION INSTRUCTIONS

Summary

Following the steps in this guide will unlock a new level of insight and actionability on your 6sense Data within Salesforce

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Introduction

6sense Pipeline Analytics by AcousticSelling ("6PA") is an app to measure the impact of 6sense directly in Salesforce. Through a series of Dashboards and Reports, customers can easily compare the performance of 6QA (6sense Qualified Account) and Hot Accounts vs all others on Opportunity creation and win rates, velocity, and deal size. This ability to view real-time performance data, complete with all the typical Salesforce reporting options, provides **independent proof of value** sought by many 6sense customers.

Summary Of Key Features

6sense Account Segment + Temperature Performance Dashboard showing the correlation between 6sense Segments and Account Temperature

6sense Account Segment + Buying Stage Performance Dashboard showing the correlation between 6sense Segments and Buying Stage/6QA predictions

6sense Opportunity Temperature Performance Dashboard showing the impact of 6sense Account Temperature on Pipeline

6sense 6QA Opportunity Performance Dashboard showing the impact of 6sense Buying Stage and 6QA on Pipeline

6QA Action Dashboard showing the quality and quantity of Sales follow up, as measured by Opportunity Progression and Contact Engagement

6sense Segment Reporting showing current member Accounts and additions/removals over time and Opportunity attribution

Account Temperature History showing Temperature change over time for an Account

Buying Stage History showing Buying Stage prediction changes over time

Overall Pipeline Health Reporting on Opportunity creation rates, win rates, amount, and time between stages



Purpose Of This Guide

This guide is intended for users with Salesforce and 6sense System Administrator permissions and a basic knowledge of setup for each product. The interpretation and explanation of the data shown in the Reports and Dashboards is out of the scope of this guide and is available as an add on Consulting service.

Install For Admins Only

When prompted at the installation page, select “Install for Admins Only”. You will assign Permission Sets to the rest of your selected Users.


Install 6sense Pipeline Analytics
 By AcousticSelling



☒ **Install for Admins Only**



☐ **Install for All Users**



☐ **Install for Specific Profiles...**

☐ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install

Cancel

App Name	Publisher	Version Name	Version Number
6sense Pipeline Analytics	AcousticSelling	Lakeview	0.33

Description
 Learn more, Do More - in Salesforce. A complete reporting and analytics solution to measure the impact 6sense is having on revenue. This app includes Dashboards for Account Segmentation, Account Temperature, Buying Stages, and 6QA follow up.

Additional Details [View Components](#)

Assign Admin Permission Set

Go to Setup>Users>Permission Sets and make the following User assignments.

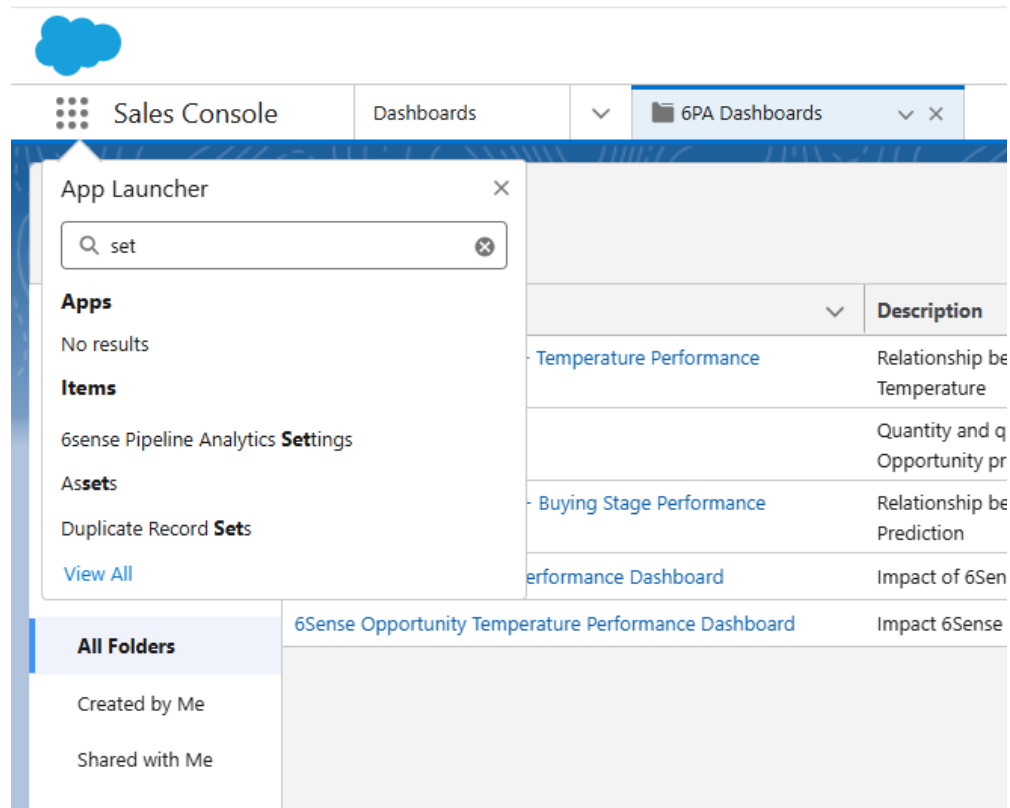
6sense Pipeline Analytics Admin. View and edit access to Custom Fields and Objects used for all 6PA features. Assign this sparingly only to those doing the initial setup or making any changes to settings (which is rare).

6sense Pipeline Analytics User. View access to Custom Fields and Objects used for 6QA related reporting. Assign this to all Users who need access to the reporting and information, but who do not regularly engage with Customers in a sales capacity.

6sense Pipeline Analytics Sales User View access to all reports and dashboards. Assign this Permission Set to all users whose activity should be counted in Sales Follow Up activity/action reporting.

Settings

Go to 6sense Pipeline Analytics Settings Tab in App Launcher



The screenshot shows the Salesforce App Launcher interface. At the top, there are tabs for 'Sales Console', 'Dashboards', and '6PA Dashboards'. The 'App Launcher' modal is open, displaying a search bar with the text 'set'. Below the search bar, there are sections for 'Apps', 'Items', and 'Assets'. Under 'Items', the '6sense Pipeline Analytics Settings' item is listed. To the right of the modal, a table displays various dashboards:

	Description
Temperature Performance	Relationship be Temperature
Buying Stage Performance	Quantity and q Opportunity pr
Performance Dashboard	Relationship be Prediction
6Sense Opportunity Temperature Performance Dashboard	Impact of 6Sen

STEP 1: Review your Permission Set Assignments

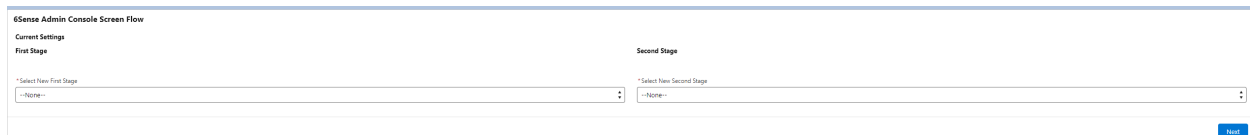
STEP 2: Choose Key Opportunity Stages

Most of the Reports in the 6sense Opportunity Performance Dashboard and 6sense 6QA Opportunity Performance Dashboard use fields referring to the **First Stage** and **Second Stage**, which are used as endpoints for tracking conversion rates and velocities in your Sales Pipeline.

On the Settings page you select the two Opportunity Stages to use for these metrics. It's most common to select a top of funnel and a mid-funnel.

Opportunity Record types are not currently supported, **so make sure both selections are from the same Sales Process and that the First Stage is earlier than the Second Stage**. For example, don't choose "Discovery" as First Stage and "Renewal Conversation" as Second Stage if they're in different New vs Existing Business sales processes.

We recommend choosing both stages from your New Business Sales Process.



STEP 3: 6sense Field Mapping

Use this section to set any fields you already have mapped to the below 6sense values as part of your existing 6sense<=>Salesforce nightly sync. Otherwise, leave the defaults values. For more information regarding the 6sense/Salesforce integration, visit this [6sense Support Page](#).

STEP 4: Add new Fields and Related Lists to Layouts

Add desired Custom Fields and Related Lists to desired Layouts by going separately to Setup=>Object Manager=>{Object}=>Layouts for each Object. Here is the complete list of Custom Fields and Related lists by Object.

Account Fields

- Created by 6sense
- Initial 6QA Date
- Initial 6sense Hot Date
- Last 6QA Date
- Last 6sense Segment Change Date
- Last Opp Created Date
- Last Opp S1 Date
- Last Opp S2 Date
- MQA Disqualification Date
- MQA New Date
- MQA Opportunity Date
- MQA Working Date
- Opp Created While Hot
- 6QA
- 6QA to S1 Activity Count
- 6QA to S2 Activity Count
- 6sense Account Temperature
- 6sense Buying Stage
- 6sense Created By
- 6sense MQA Status

- 6sense Segment name

Account Related Lists

- 6sense Account MQA History
- 6sense Account Segments
- 6sense Account Temperature History
- 6sense Buying Stage History
- 6sense Segment History

Contact Fields

- Created by 6sense
- Working Date
- 6sense Contact Status
- 6sense Created By
- 6sense Disqualification Date
- 6sense Disqualification Reason
- 6sense New Date
- 6sense Opportunity Date

Contact Related Lists

- 6sense Contact Status History

Opportunity Fields

- 6s Acct Temp when Created
- Last 6sense Account Temperature
- 6QA When Created
- 6s Buying Stage when Created
- 6sense Initial First Stage Date
- 6sense Initial Second Stage Date
- 6sense Latest First Stage Date
- 6sense Latest Second Stage Date

Opportunity Related Lists

- 6sense Account Segments

STEP 5: Sync Your Custom Fields

If you mapped custom fields, you will be prompted to launch an initial sync. If you have left all the defaults in place, you will not see this option.

STEP 6: Check Batch Job Schedule

IMPORTANT! There is a nightly **2 am** batch job to process changes to 6sense Segment and Account assignments.

This job must run after the 6sense<-->Salesforce sync, managed in 6sense.



If you need to adjust the Salesforce batch job timing, go to Setup -> Scheduled Jobs and modify '**Nightly Account Segment Batch Job**'.

As above, if you have left all the defaults unchanged you will not see this option.

6sense Admin Settings

The following 6sense fields need to be synced with Salesforce. Contact your 6sense CSM for further support.

Account

Account Temperature

Follow instructions at <https://support.6sense.com/knowledge-base/export-account-temperature-via-data-workflows-enrichment> and map to the Account 6sense

Account Temperature Field (API Name = as6sense__X6sense_Account_Temperature__c)

Segment Name

Follow instructions at <https://support.6sense.com/knowledge-base/360051723814-getting-started-with-segment-name-enrichment-orchestration-with-your-crm> and map

to the Account 6sense Segment Name Field (API Name = as6Sense__X6sense_Segment_Name__c).

Buying Stage and 6QA

Follow instructions at <https://support.6sense.com/knowledge-base/1500001172161-set-up-score-exports-orchestration/> and map 6QA to 6QA (API Name =

as6sense__X6QA__c) and Buying Stage to 6sense Buying Stage (API Name = as6sense__X6sense_Buying_Stage__c)

6sense Created By

Follow Mapping Profile Instructions at <https://support.6sense.com/knowledge-base/mapping-profiles/> and map to 6sense Created By (API Name =

as6sense__X6sense_Created_By__c)





Contact

6sense Created By

Follow Mapping Profile Instructions at <https://support.6sense.com/knowledge-base/mapping-profiles/> and map to 6sense Created By (API Name = as6sense__X6sense_Created_By__c)

Other Information

Default Dashboard and Report Sharing

The default folder sharing is All Internal Users. Update as needed.

Custom Metadata

These are on/off Toggle Switches for Flows used in this package.

SETUP

Custom Metadata Types

6PA Automation Switch (Managed)

This 6PA Automation Switch is managed, meaning that you may only edit certain attributes. [Display More Information](#)

6PA Automation Switch Detail

Edit

Clone

Label	Master	Protected Component
6PA Automation Switch Name	Master	☐
All Switch	☒	Namespace Prefix as6sense
6S Account Segment History	☒	
6Sense Account Last Segment	☒	
6Sense Account Temperature	☒	
Opp6SenseTempOnCreate	☒	
Opp Hot Account	☒	
Temperature History	☒	
Stage Timestamps	☒	
6QA	☒	
6QA Timestamps	☒	
Opp6SfBuyingStageOnCreate	☒	
6S Account Create	☒	
6Sense Contact Create	☒	
6sense Buying Stage History	☒	
UpdateMQA Status	☒	
MQATimestamp	☒	
6sense Contact Status	☒	
ContactStatusTime Stamps	☒	
MQA StatusHistory	☒	

Conclusion

We hope you get even more out of your Salesforce and 6sense Investments by using 6PA. If you have any questions or comments, please contact us at 6pa@acousticselling.com.

