



Speakerbus

Integrations

Acoustic ZenDesk Sell Suggestions

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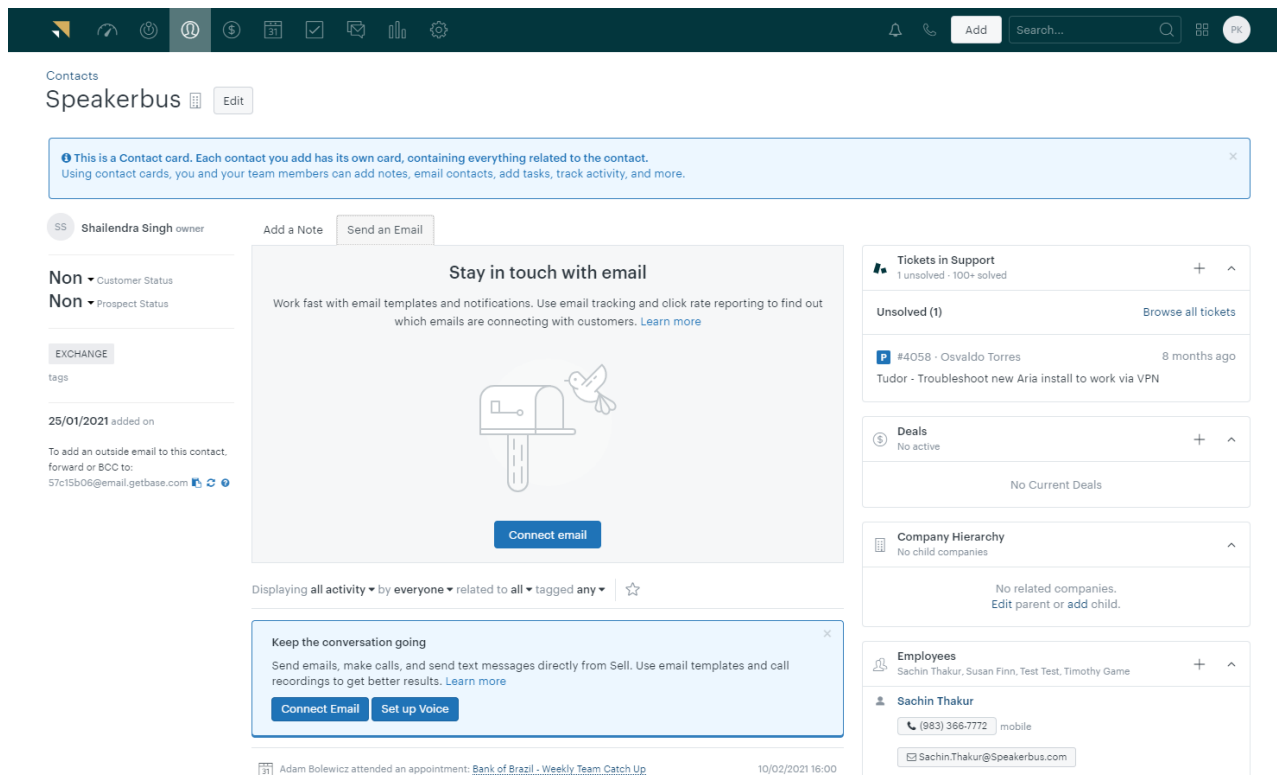


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Contacts/Lead email

Zendesk application allows users to connect to Outlook to send emails. However, it would make sense to have the acoustic 'button' or 'Tab' available in these panes.



The screenshot displays the Speakerbus interface for a contact named Shailendra Singh. The main content area features a 'Stay in touch with email' section with a 'Connect email' button. Below this is a 'Keep the conversation going' section with 'Connect Email' and 'Set up Voice' buttons. The right-hand sidebar contains several sections: 'Tickets in Support' (1 unsolved, 100+ solved), 'Deals' (No active), 'Company Hierarchy' (No child companies), and 'Employees' (Sachin Thakur, Susan Finn, Test Test, Timothy Game). A 'Sachin Thakur' employee card is also visible with contact information.

You might also want to see:

- What programs they are in.
- Add them to programs
- Remove them from programs
- Widget (above righthand side)- could show interactions on Email

Currently when you select contacts email icon appears but this is limited to 300 a day.

Daily email quota exceeded

For security purposes, outgoing emails are limited to 300 per day.

You have 300 emails left.

You can go back and adjust your recipients list or continue to compose your email. Please note that if you continue, only first 300 recipients on the list will be emailed.

Go Back Continue

The email option is currently triggered by ticking the tick box and clicking the email icon. An Acoustic icon could maybe be added to this list.

WORKING LIST
 ☰ **Contacts** Save as Smart List ⚙️

☑️ 56 / 56 📞 ✉️ 📄 Reassign Owner Merge Delete

Contact	Ownership	Last Activity Date
☑️ Wells Fargo Bank	TG Troy Grinage	10/02/2021

Smart Lists

ZenDesk Sell does not currently have a campaign option. They instead recommend using 'Smart Lists' to combine contacts.

WORKING LIST
 ☰ **Contacts** Save as Smart List ⚙️

🔍 Type to filter by contact name 🔍 Clear all filters (2)

Contact	Ownership	Last Activity Date	Days Since Last Communication Everyone's Communication	Country	Relationship Type
📄 Wells Fargo Bank	TG Troy Grinage	10/02/2021	1 day 📧 ✓ To: Troy Grinage	United States	Client
📄 Morgan Stanley	TG Troy Grinage	08/02/2021	No communication yet	United States	Client
📄 Raymond James Investment S	TG Troy Grinage	06/02/2021	8 days 📧 ⚠ From: Troy Grinage	United States	Client

We would need a way to use these grouped clients to send bulk emails too. For example, send an email to all Clients in the United States.

In SFDC we have a send 'Silverpop Email button' to trigger the bulk send to a campaign group.

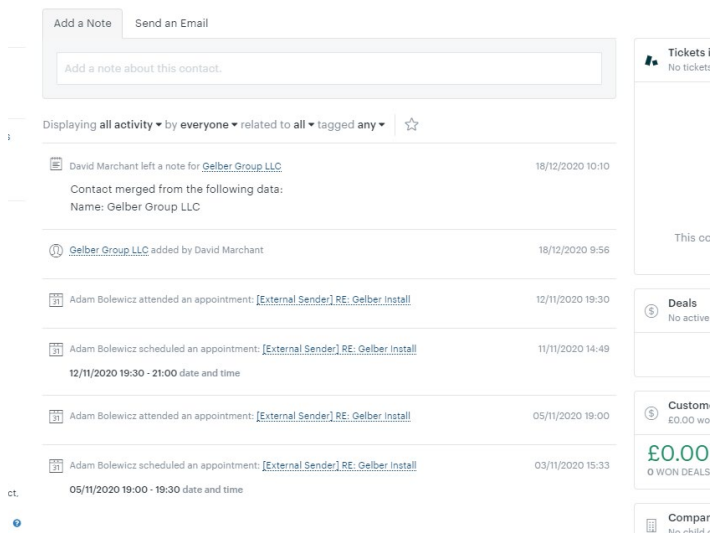
Database Linking

The database should be synced between ZenDesk Sell and Acoustic. This should allow fields to be pushed from and too Zendesk.

We should be able to map field between the two platforms.

Alerting of Activity in Zendesk

When a client has clicked/interacted with a tracked email this activity should be displayed in the notes section of the company/contact.



Activity feed for **Gelber Group LLC**:

- David Marchant left a note for [Gelber Group LLC](#) on 18/12/2020 10:10. Note: Contact merged from the following data: Name: Gelber Group LLC
- [Gelber Group LLC](#) added by David Marchant on 18/12/2020 9:56
- Adam Bolewicz attended an appointment: [\[External Sender\] RE: Gelber Install](#) on 12/11/2020 19:30
- Adam Bolewicz scheduled an appointment: [\[External Sender\] RE: Gelber Install](#) on 11/11/2020 14:49. Appointment: 12/11/2020 19:30 - 21:00 date and time
- Adam Bolewicz attended an appointment: [\[External Sender\] RE: Gelber Install](#) on 05/11/2020 19:00
- Adam Bolewicz scheduled an appointment: [\[External Sender\] RE: Gelber Install](#) on 03/11/2020 15:33. Appointment: 05/11/2020 19:00 - 19:30 date and time

Summary Cards:

- Tickets:** No tickets
- Deals:** No active
- Custom:** £0.00 WON DEALS
- Comparisons:** No child

Scoring Alerts would also make sense to push a note on to the note screen of the company/contact.

Insight Reports

We currently have 'contact insight' section on SFDC - this shows all the emails, links clicked on website etc. We would like to replicate something similar on ZenDesk Sell. It also allows the user on SFDC to see what the emails sent were. This is useful as most sales members don't use the Acoustic portal.

Tags

Zendesk does not currently have a campaign section, they do have a 'Tag' feature these can be added to Leads and Contacts. My suggestion would be to automatically add these to contacts/leads when they are sent bulk mail or in programs so you can filter and search on them later.