Getting Started with ✳AccelerateIQ

A Brief Overview of How to Use Accelerate to Generate Appointments at Scale

Welcome to AccelerateIQ!

A Quick Guide to Outbound Calling

1. Log-in
2. Click on the **Call Processing** link on the Dashboard
3. Review the name in the **Caller Details** section. This is the **Current Prospect** and who should be immediately called.
4. Optimize the script for the **Current Prospect** using AI to customize it for the person and the company. To do so, **click on X and then click on Y.**
5. Click the **Dial** button. This will call the prospect.
6. If the prospect answers, give your perfect pitch.
7. After the call concludes, process the call by selecting one of the displayed options which include booking an appointment, no answer, or scheduling a callback.
8. If an appointment was scheduled, download the appointment to your CRM/Sales Enablement system.
9. Click **Next** and the system will display the next prospect to be called.

System Overview

Accelerate IQ 2.0 is a conversion platform that will help your company connect with prospects and book appointments at scale. It is powered by an AI engine called xSellsior. xSellsior has four super-powers that will improve your outbound calling production by 10X. **These powers include:**

IQ Connect: The software knows which of your prospects to call and when so there is a 20% connect rate.

IQ Perfect Pitch: Using ChatGPT, the software will scrape the web about the prospect/company being called and will then customize your basic script to take outside information into account.

IQ Coach: xSellsior analyzes the data that is produced as you and your colleagues use the platform and will provide you with advice on how to improve your outbound calling performance.

IQ Nurture: Setting appointments is only the first step. To mean anything, they have to go off. xSellsior will help you remind prospects of upcoming appointments and those that fail to show, reschedule them.

AccelerateIQ can be accessed on the web at www.accelerateIQ.ai
It is desktop and mobile-friendly.

Structure

The platform is comprised of the following three components.

Log-in Screen: Allows you to log into the software with a user-specific password.

Dashboard: Every user has a personalized dashboard that provides KPIs on their outbound calling performance. Managers get a specialized dashboard that allows them to see KPIs for the entire team using the platform and each individual.

Call Processing Screen: Allows the user to make outbound phone calls to prospects, process the results and access a wide range of tools that will improve performance.

Setting up Your Instance of the Software
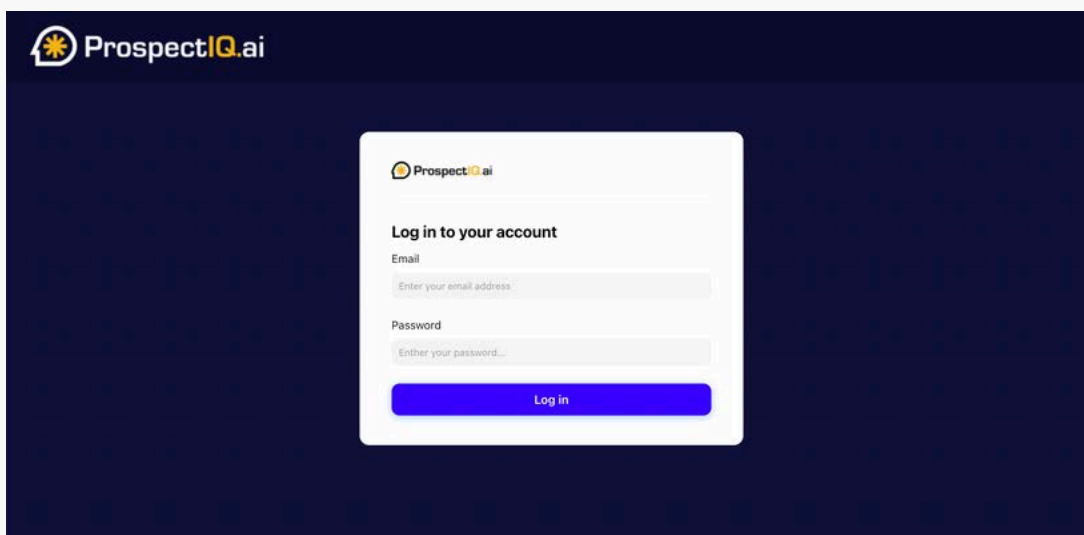
Logging In

To use the software, our customer support team will email your user name and password.

Visit **www.accelerateIQ.ai** and type your credentials into the space provided.
This will open the application.

Loading Leads to Call

If you have not given us your ideal customer profile, the first time that you enter into the software, the dashboard will be blank and the only thing you will be able to do is click the Load Leads button which brings you to a screen where you can provide us with your leads via a spreadsheet or fill out your ICP. If you would like us to pull the leads, please be sure to enter all the information as it makes the data more reliable.

IMPORTANT NOTE: We strongly suggest that you schedule a meeting with a Conversion Specialist and work together to pull your leads as it will dramatically improve your calling results.

If have already provided us with your ICP or leads via a spreadsheet, then when you open the software for the first time, the leads will have already been processed, enhanced and loaded into the system so you can start outbound calling.

The software automatically monitors your performance and learns your outbound calling patterns. The algorithm will ensure that your instance is always full of leads so that you can optimize your outbound calling. During the trial period, however, you are limited to calling 50 prospects.

Logging Out

To ensure that data is preserved, it is important for you to log-out of your instance of the software.

You can log out by clicking the XXX button on the Dashboard.

NOTE: Every night the system automatically performs nighttime processing in which the AI determines the calls that will be made the next day. To accomplish this, the system will automatically log you out between the hours of **XX-XX.**

Using the Dashboard
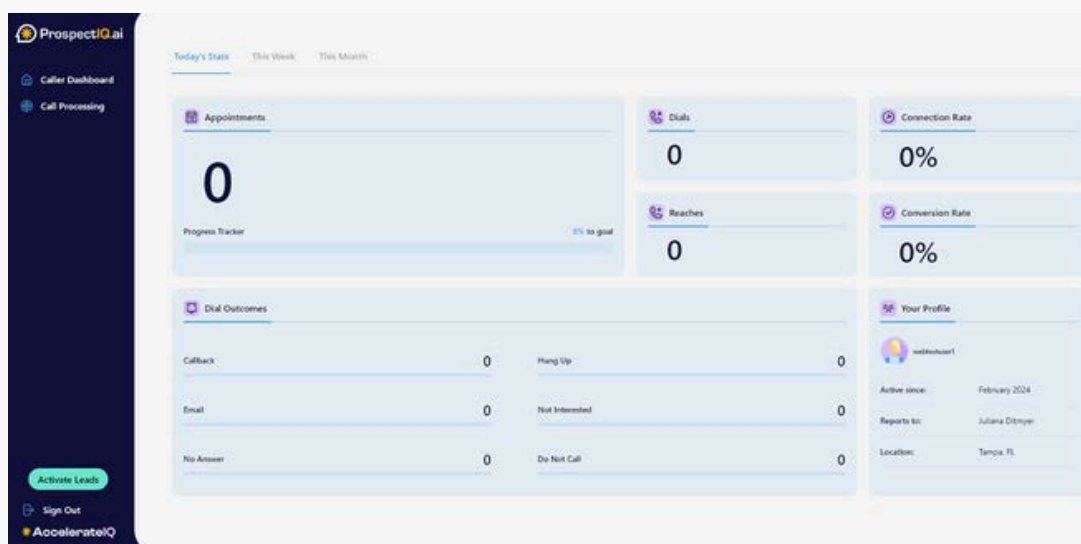
Each user gets a customized dashboard that reflects his or her outbound calling KPIs. It is the first screen that is seen when you open the software.

The dashboard displays a wide range of calling data. The data can be accessed by day, week, month or quarter. It is also possible to enter a specific date range.

The dashboard is divided into the following three components:

KPIs: In the top half of the screen, the application displays key performance indicators such as dials made, prospects reached and appointments booked.

Call Details: The bottom half of the screen provides aggregated information on the result of each call made to a prospect. This gives you insight as to how your calls are progressing and what improvements can be made.

Managers have their own specialized dashboard that aggregates information across team members so he or she can understand team performance. It is also possible to select and individual team member and review his or her results.

The Call Processing Screen (Making Outbound Calls)
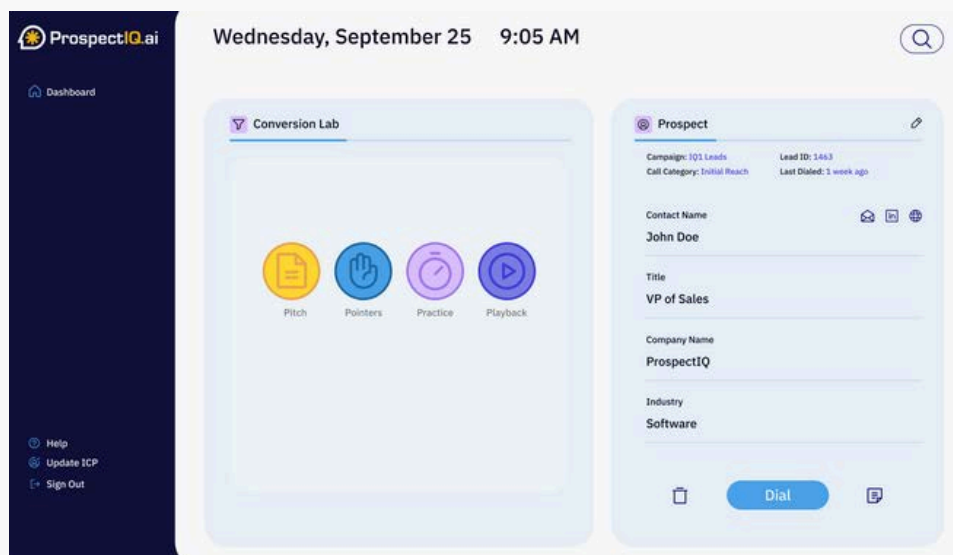
The Call Processing Screen, accessed from the Dashboard sidebar, it the space where you are able to make calls to prospects as well as optimize your actions.

The call processing screen is divided into five principle components:

Conversion Lab: On the left side of the screen you can find the conversion lab which gives you access to a wide range of tools that will help you optimize your outbound calling performance.

Prospect Details: On the left side of the screen is details on the prospect that should be called at the time that you opened the screen. Specifically, the system as determined that the name displayed is most apt to pick up the phone if you dial it at the current time.

Call Details: On the top of the screen is detailedcall information on the current prospect being displayed such as what type of lead it is, what is its status, where it is in the calling cadence and whether it is part of a specific campaign.

Dialer: Below the prospect information is a DIAL button that allows you to automatically access the dialer and make the outbound call to the prospect.

Processing Screen: Once you click dial, the Call Detail screen temporarily disappears and is replaced by the processing screen where you can tell the AI engine what happened on the call.With this information, the system then knows what to do with the prospect next.

Using the Conversion Lab

The Conversion Lab provides you with tools that can help you optimize your outbound calling.

The Conversion Lab contains four tools each represented by a colored icon. To access the tool, click on the button.

The following tools are currently available although more are being added frequently.
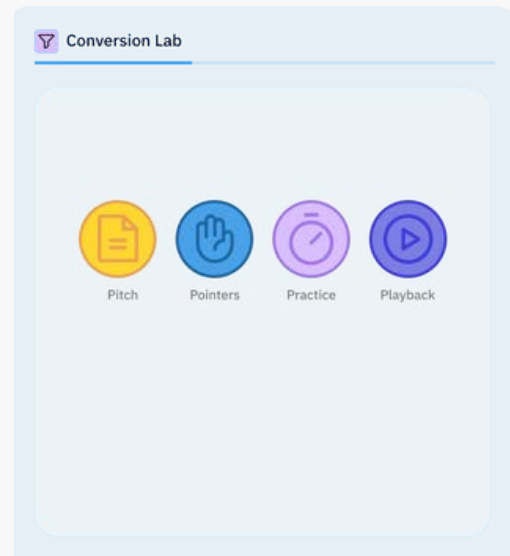
Pitch: This tool allows you to take your basic script that you employ with prospects and optimize it for the Current Prospect (the prospect displayed in the Prospect Details window. In addition, very often, prospects will state standard objections on why they don't want to take an appointment. The Objection Optimizer helps you handle objections by providing canned responses that have been customized for the Current Prospect.

Practice: The single most important thing to increase conversion rates (next to reaching the prospect) is to become proficient with the script and objection handling. While callers can practice on live leads, it is much better to practice without burning opportunities. As such, we provide AI training agents that will play the role of a prospective prospect so that outbound callers can increase their skills.

Playback: Every call made through the ProspectIQ system is recorded. This tool allows you to listen to calls and also review transcripts. Even more importantly, it the next version of the application, the AI engine will analyze each call and provide advice on what could have been done to increase the chances for a conversion.

Pointers: The system collects a wide range of data on every call made. This data is aggregated and can be used to better understand the performance of each caller and the team of callers. Specifically, on a number of key performance indicators it compares a callers performance against other callers. Where there is a deviation from the average greater than 10% in either direction that can be cause for celebration or might indicate a potential issue that should be addressed. In addition, the system will provide helpful hints on how to improve performance.

Understanding the Prospect Details

The Prospect Details section, found to the right of the Processing Screen, displays information on the next Prospect that you should consider calling as he/she is most likely to pick up the phone. This person is known as the Current Prospect.

It provides a wide range of data including name, title, email, etc. You can also click to view the prospects LinkedIn profile and other relevant information.
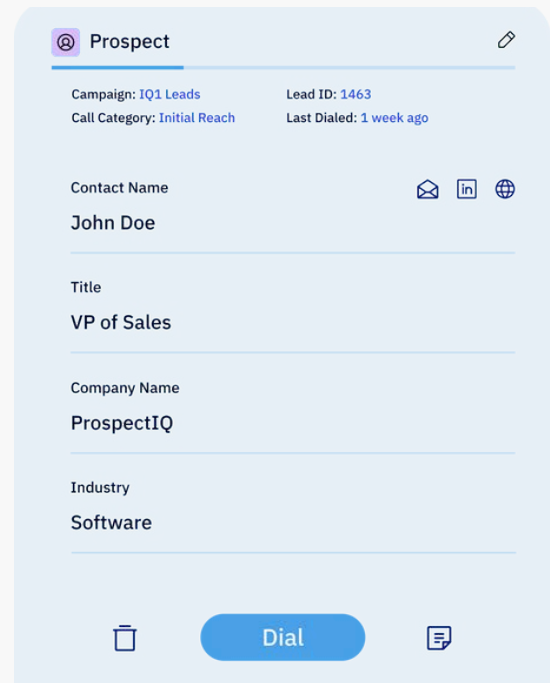
Before making the call to the Current Prospect, be sure to optimize the associated script so it reflects the person's history and company.

Understanding Call Details

Each Prospect that is available to be called is part of a following data set that contains the following information.

Campaign: A Campaign is a group of Prospects that share the same instructions on how the system should handle the names.
- The Current Campaign that the prospect is part of is displayed above the prospect details section.
- While there are a number of very sophisticated campaigns such as A/B Test Campaigns and Marketing Coordination Campaigns, the standard campaign is the Calling campaign in which the system simply feeds up the next best prospect name to call at the time and date.

Type of Call: Each call to a prospect can either be an outbound call to schedule an appointment, a callback to follow-up on a previous call, a call to remind a prospect of an upcoming appointment or a call to reschedule an appointment.

Cadence: It might be necessary to call the Prospect more than once. In fact, the odds of reaching a prospect increase approximately 30% each time a call is made. As such, the automatically enrolls every prospect in a 5 call cadence to ensure a reach.

This data is displayed on top of the Call Detail section and is updated in real time.

Understanding Dialing Prospects (Dialer)

By clicking the Dial button at the bottom of the Detailed Section, the system will automatically use our Dialer to call the prospect.

Our Dialer is programmed to ensure that your number will not show up as spam.

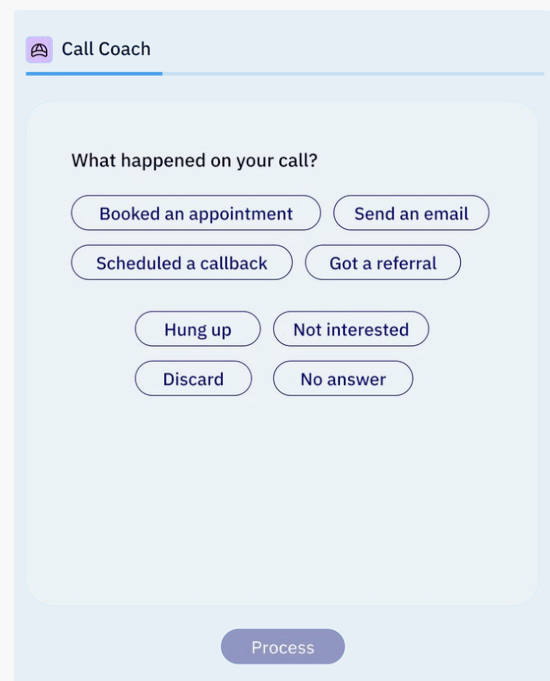It is also programmed to use a local presence number that matches the area code of the number being called.

Recordings and transcripts of each call are made and available to you in the conversion lab for review.

Understanding Call Processing

Call Processing allows you, the user, to tell the software what happened on the last phone call. This information will be used to tell the AI engine what to do with the Prospect next.

It is critical to the functioning of the system that you accurately describe what happens on the call as anything less than total candor will cause the algorithm to not function effectively.

The Call Processing Screen becomes visible once you click the Dial button when it replaces the Call Detail screen.

There are a number of choices that you can select from when telling the software what happened on the phone call.

Each is described below:

Booked Appointment: This selection allows you to choose the time and date for the appointment that was booked.

Call Back: This selection allows you to choose the time and date for a call back to the Prospect.
CAUTION: Do not use this feature to schedule a fake call back as it will break the algorithm and actually lower the possibility of a reach being made.

No Answer: Use this selection is where you do not reach the Current Prospect. The system will automatically schedule the next best time to call.

Not Interested: Use this selection where the prospect is uninterested in the solution. It removes the Current Prospect from the call rotation.

Hang Up: Use this selection where the prospect immediately hangs up the phone without you having a chance to pitch. This will cause the system to call the prospect back as part of the regularly scheduled rotation.

If you would like to take notes on the Current Prospect, click the Notes icon at the bottom of screen.

Once you "process" the current Prospect, click **XXXXX**. This will allow you to download the lead if an appointment was scheduled.

To get to the next prospect to call, click **XXXX**. This will automatically take you to the next best Prospect to call.

Understanding the Pitch Tool

The Pitch Tool allows you to:
- View your Current Script
- Customize the Current Script for the
- Current Prospect
- View your common objection rebuttals
- Customize a rebuttal for the Current Prospect.

To access the Pitch tool, click the Pitch button on the front page of the conversion lab section.
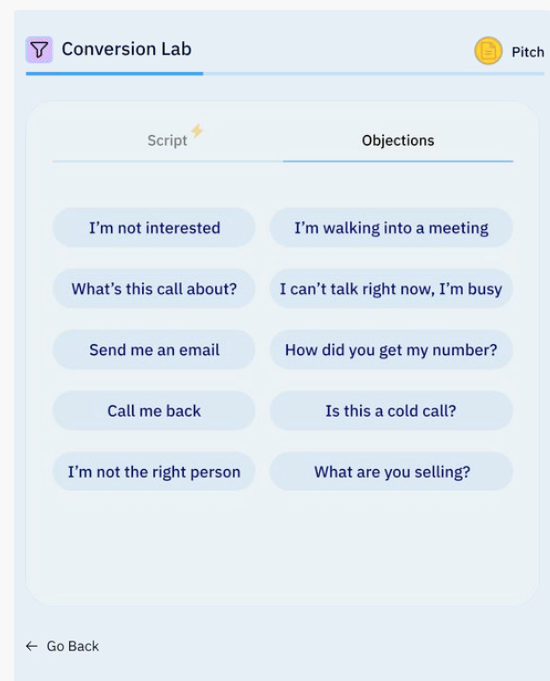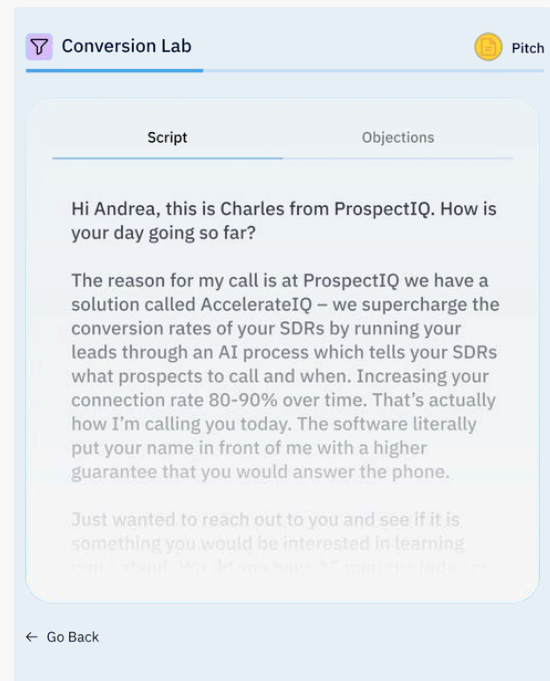
There are two components of the Pitch tool:

Script: This will allow you to view your Current Script and customize it for the Current Prospect.

Objections: This will allow you to view common rebuttals for objections and customize them for the Current Prospect.

Customizing the Current Script for the Current Prospect

To customize the Current Script of the Current Prospect, click the AI Processing button at the bottom of the screen.

Clicking the AI Processing button at the bottom of the screen will kick off a process where the web is scraped for information on the Current Prospect. Then the software uses conversational AI to customize the script in real time for the Current Prospect.

On the Objection Tab, click on the objection that is relevant to the current situation.

Click on the AI processing button at the bottom right of the screen to customize the objection for the Current Prospect.

Understanding the Pointer Tool

The Pointer Tool allows you to better understand how you are performing and to get advice on how to increase conversions. It does this by comparing you to your team and the ProspectIQ universe at large.

The system will display a wide range of KPIs that are common indicators of success.
As a rule of thumb, if you are doing 10% better than the average, you are doing well.
If you are doing 10% worse, there is room for improvement.

You can get advice from our AI engine on how to improve by clicking on the individual KPI.

Understanding the Practice Tool

The Practice Tool allows you to practice your pitch and objection handling on an AI Agent that has been programmed to be a prospect.

To access the Practice Tool, click on the Practice Button on the Conversion Lab opening screen.
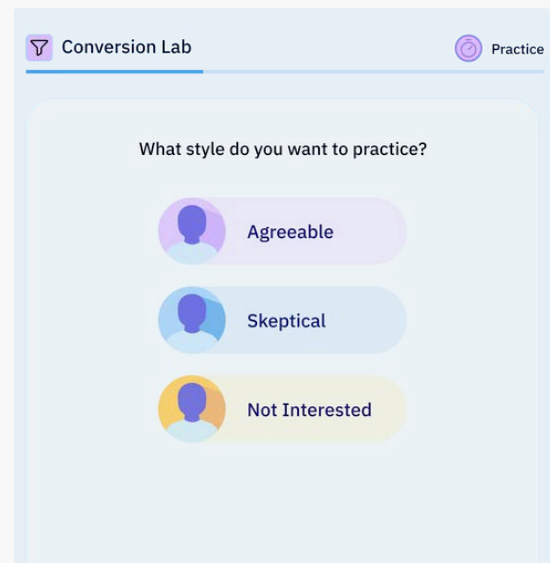
Three AI Agents have been created, each with a different persona to help you hone your pitch.To use an Agent, simply click on the button and click the phone icon. The system will automatically dial the Agent. Treat the agent as a real prospect and give your pitch and handle objections.

Understanding the Playback Tool

The Playbook Tool gives you real time access to the recordings of any call made with a Prospect.

To access the Playbook Tool, click on the Playback button on the main screen of the Conversion Lab. This will open the main screen of the Playback module.

The Main Screen of the Playback Module will display all the call recordings from most recent to last. You can also search for recordings by date, contact name and outcome by clicking on the magnifying glass at the bottom of the screen.

To listen to a recording click the microphone icon.

To view a transcript of the call, click on the page icon.