

User Management Admin *Services*

PURPOSE

Users, Profiles & Teams make it easy and efficient to manage your users and permissions in Conversica. Every user has a role and a set of permissions to control what they can see and do in the Conversica Dashboard. User hygiene in our dashboard may take some time and effort however, we have a solution to take the responsibility off your hands.

Once you have defined and set up your initial user, profile and team structure you can have Conversica handle all the ongoing updates, leveraging our best practices for optimal performance. The User Management Service is fixed price and allows you add, change and manage up to 75 users on the cadence you choose, weekly, bi-weekly or monthly.

Empower us to keep your users up to date so you can focus on more important things such as revenue. We will handle all of the user hygiene on your behalf and will continue to keep your user base up to date. This includes adding or removing users, updating teams, updating alerts, updating user settings, rep assignment, reporting, and so on.

HOW IT WORKS

Conversica Team

- Leads discovery and ideation
- Serves as the Conversica “user” manager
- Provides strategic recommendations and consultative guidance
- Enhanced support along the way



Client Team

- Collaborates in discovery and ideation
- Updates Conversica team on any upcoming changes/updates

Services

USERS, PROFILES & TEAMS

- **Add/Remove/Edit Users:** Let us manage all your team including adding, removing and editing users. This could mean updating your user list to remove users who are no longer with the company. If users are promoted or switch roles, we can also take care of updating their user profiles.
- **Configure Alerts:** Let us manage all your lead alerts. Who should receive them and what type of alerts they should receive. When roles change, alerts may also change for those users. We can take care of this for you!
- **Configure Teams:** If you leverage teams, let us manage them! Who should be assigned to a team, who should manage each team, and what teams should leads be assigned to if needed? Teams are always changing so let us keep your teams up to date at all times.
- **Configure User Settings:** Let us configure all user settings and permissions. Who should have access to what view/tools? If there are any changes to any user, let us be the ones to make the updates.
- **Rep Assignment Configuration:** Let us handle all rep assignment. What rep, reps, or teams should be assigned to what leads? If we ever need to re-strategize rep assignment or want to change the way we route leads, we can provide our recommendations and make the necessary changes.
- **User/Rep Reporting:** Let us handle and provide all the user/team performance metrics. This may be a tedious task for some teams. We can create the reports based on the criteria your team prefers.

PAYOFF

- Give your team more flexibility to focus on other priorities
- Alleviate bandwidth and let us take care of extra manual efforts
- We handle all of the user setup/removal on your behalf, keeping your user base up-to-date
- Clear cluttered dashboards of users who are no longer with the company and avoid permissions issues as roles change

Discovery

User Volume



How many reps/users will you be managing and is there a high rate of change/turnover?

Rep Assignment



How often should we revisit rep assignment to see if we need to make any changes?

New User Provisioning



How often would the users within Conversica need to be added to best stay up-to-date with your hiring process? Weekly, bi-weekly, monthly?

How will the user lists be created and sent to Conversica? What team will be responsible for this action?

Removing Users



How often would the users need to be removed to best stay up-to-date? Weekly, bi-weekly, monthly?

How will the user lists be created and sent to Conversica? What team will be responsible for this action?

When removing users, if they are assigned leads, who should they be re-assigned to?

Updating User Settings



How often will we need to update individual user settings?

Updating Alerts



When updating users, will you also be noting the alerts they should be getting? Should we be following alerts on a per-profile basis?

Updating Teams



How often will we need to update teams?