How to Use (and not use)

Handshakez is best used for once the lead has converted to an opportunity.

> Handshakez not recommended at this phase.

1. Open the room directly from the Salesforce opportunity record.

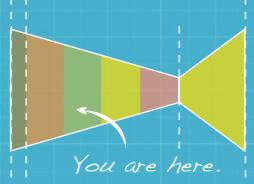
2. Warm up the room with 3-5 items, but try not to overwhelm them with content at this stage. Try including rich media & thought leadership content.

3. Be sure to give the room & the content appealing names to inspire interest from your customer.

Lead Generated

Handshakez Sweet Spot begins here.

Sales Funnel Key



After qualifying the opportunity, begin building the Handshakez room.

After your first meeting, invite the customer team to the room.

4. Introduce Handshakez to the customer before inviting them to the room.

5. Remind them that they can easily access the room using their LinkedIn ID.

Invite all of the key stakeholders from both teams.

6. Invite your team's subject matter experts to the room to help advance the conversation.

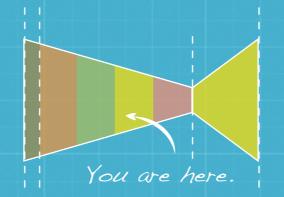
7. Copy the room's vCard on emails to capture offline conversations.

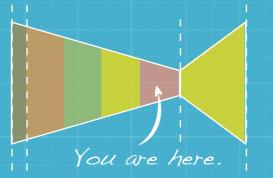
8. Learn which content drives customer interest by viewing the Insights tab.

Qualifying Call

Intro Meeting

Building Consensus





Create a narrative to help your champions drive your deal to closure.

9. Use @mentions to direct customers to compelling content pieces.

10.Refine your understanding of customer requirements with the use of polls.

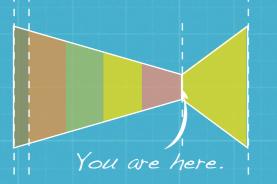
11. Welcome new members to the room with an @mention.

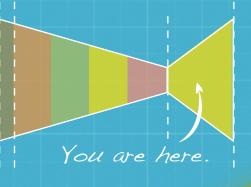
12.Set up a schedule of content that you "drip" into the room.

Nurturing the Opportunity

Pricing and negotiation is a time-sensitive and confidential activity best handled in a personal conversation.

Pricing & Negotiations





Handshakez noi recommended at this phase.

After the deal closes, add the client services team to facilitate the handoff.

13.Use the same room from the sales process for onboarding and customer success for greater transparency.

14.Continue to "drip" content into the room to keep the relationship fresh and current.

Handshakez Sweet Spot begins here.

Onboarding & Customer Success