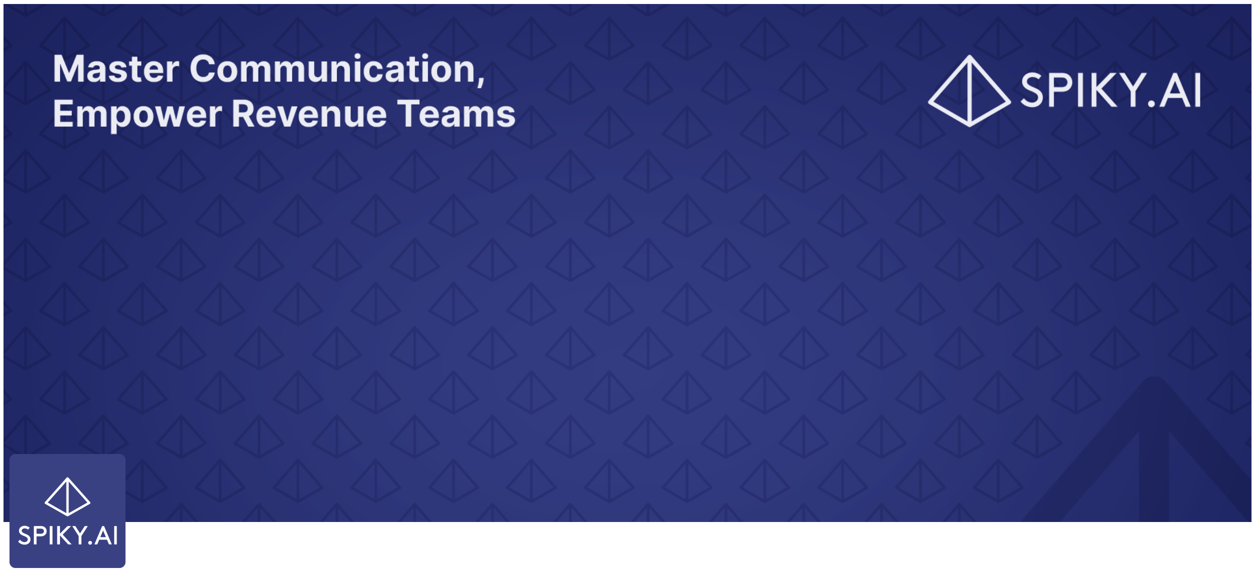


Start Unlocking the Power of Spiky: Onboarding Guide

Welcome aboard! We are happy to see you among us ☺

Check out the table of content to jump to your desired heading:

What is Spiky?

Spiky aims to improve the sales pipeline and overall performance by utilizing analytics and insights for online sales videos to help sales/revenue teams optimize their performance and close deals. We **provide automated summarization**, **data-driven recommendations**, **trends, behavior analysis**, **monitoring**, **reporting**, and **AI-assisted transcription** of online sales videos.

Spiky Platform

The Spiky platform is where the magic happens. To login to the platform, you can use this link:

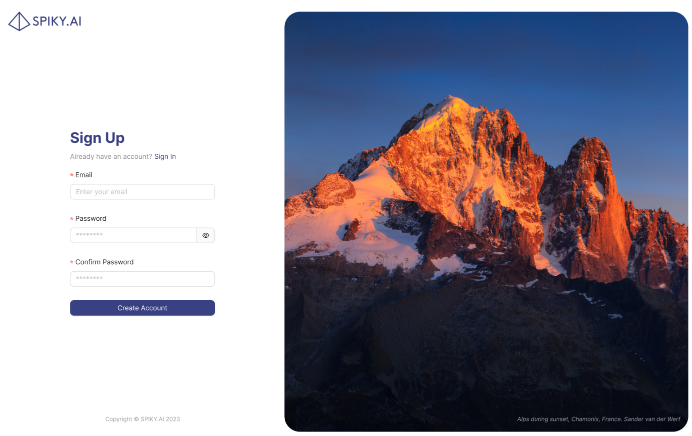
https://app.spiky.ai/

We divide this onboarding guideline into two categories to make your settlement process easier. First, we will start with the **Account & Settings**. From how you will create your account to edit it. Then, in the second category **Platform**, we will explore the insights of your meetings with the additional features to improve your experience.

✨ Please be aware that setting up your account is the first main step into the platform. You must complete this step to associate your analysis outcomes with your account and follow them.

Account & Settings

Account Creation

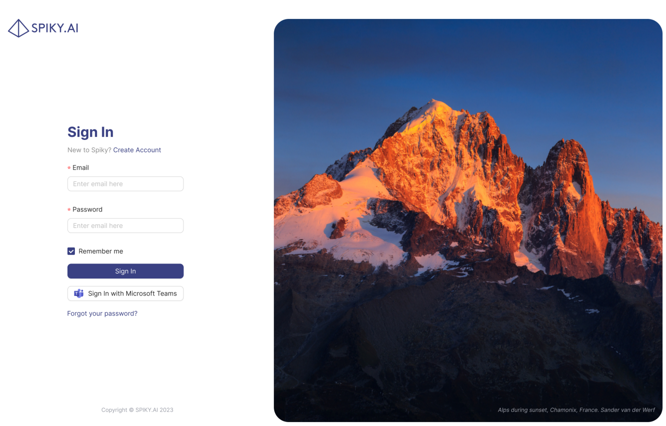


To create an account

1. Go to app.spiky.ai address and click on **Create Account**.
2. Enter your email address.
3. Set a password and confirm it.
4. Click on **Create Account**.

After you complete the sign-up, you will be directed to a confirmation screen where you are expected to type in the code you receive in your email.

Sign In



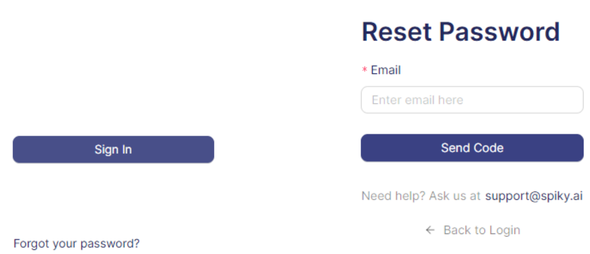
You could sign in to the platform if you created your account previously.

1. Go to app.spiky.ai address.
2. Enter your email address.
3. Enter the password you set.
4. Click on **Sign In**.

You can use your Microsoft Teams account to sign in to the platform.

→ If you forgot your password, please click <u>here</u>.

Forgot Your Password



Don't worry; it happens to the best of us. It is effortless to reset your password and set it up with a brand-new one.

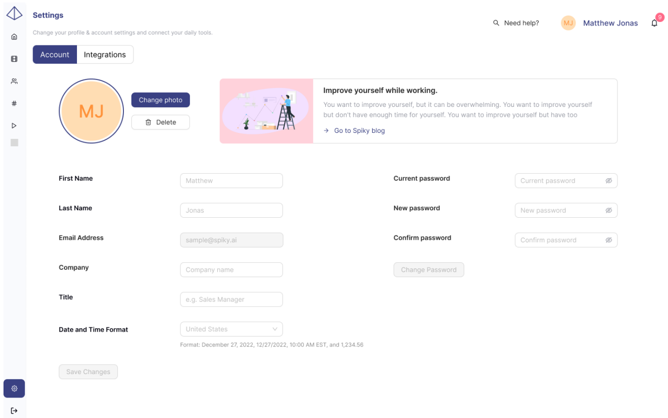
1. Go to <u>app.spiky.ai</u> address.
2. Click the **Forgot your password?** button.
3. Enter your email and click the **Send code** button for a reset password link.

Please also check out your Spam folder in your email.

After you create your new password on the redirected page and confirm your new password, you can sign in to the platform with this brand-new password.

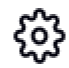
Set Up Your Account

The first step into the platform is setting up your account. You need to fill in the account information to



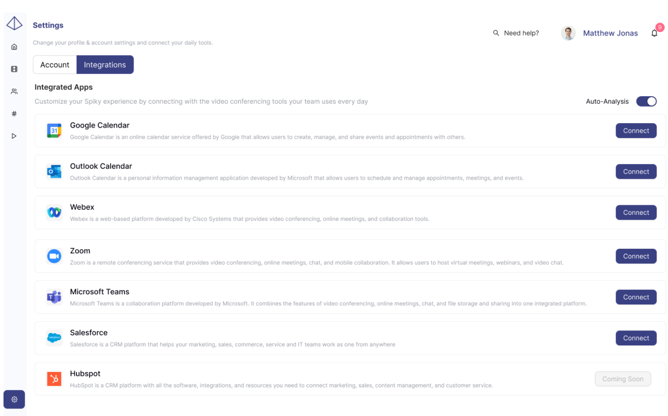
associate the outputs of the meetings with your profile.

1. Go to **Settings** from the bottom of the left vertical menu or by clicking on the name in the top right corner.



2. These are mandatory fields to fill in:
    - First and last name
    - Company
    - Title
3. Click the **Save Changes** button.

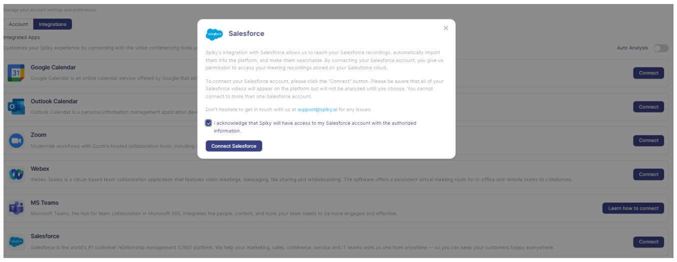
Integrations



Integrations make life easier. They improve your experience in the Spiky platform more smoother.

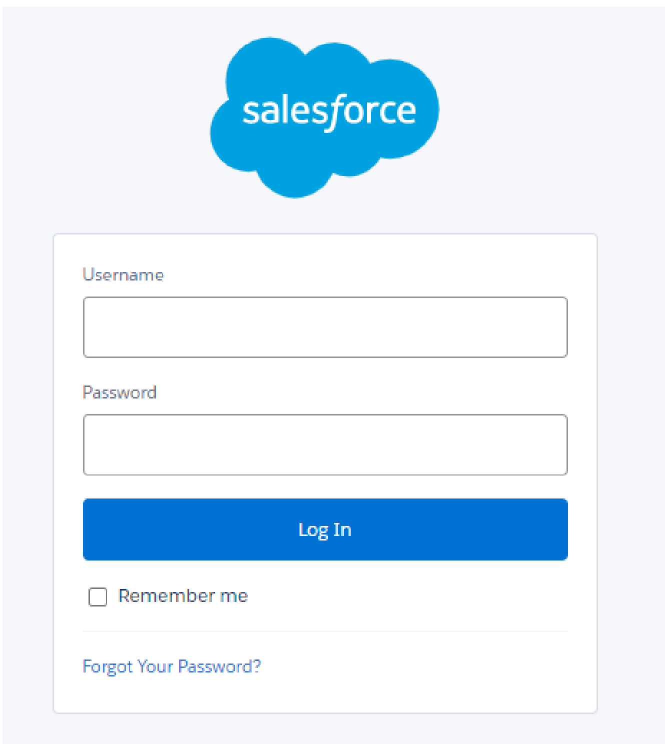
Video Conferencing Tools

In addition to being able to upload manually, integrating your accounts with video conferencing tools will make your work more effortless in the future. After all, manually uploading each meeting to the platform takes your time, and instead, you can spend that additional time closing more deals 😉



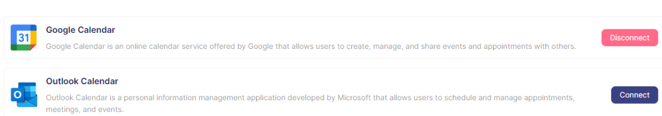
To connect your accounts from different video conferencing tools:

1. Go to **Settings** from the bottom of the left vertical menu or by clicking on the name in the top right corner.



2. Click the **Integrations** tab.
3. Select the **Connect** button to connect your Webex/ Zoom/ MS Teams account according to the video conferencing tool/tools you use.

Custom CRM Tools



> 🎉 You can use these steps for every CRM tool integration in Spiky Platform.

CRM integration helps you to:

- Track the progress of deals with Spiky Score and receive alerts for deals in different statuses to stay updated.
- Streamline your workflow by avoiding the need to switch between multiple applications.
- Enhance customer experience and understanding by using AI-based notes to identify and follow up on missed requests during meetings.

To connect your account from Salesforce:

1. Go to **Settings** from the bottom of the left vertical menu or by clicking on the name in the top right corner.

2. Click the **Integrations** tab.
3. Select the **Connect** button. After pressing the button, you will be redirected to the Salesforce login screen. Once you have logged in, your integration will be completed.

4. Your opportunity information in your Salesforce account will automatically sync to the tag page with **company tags** based on account names and **deal tags** based on opportunity names. and **stage tags** based on their stages.

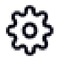
Calendars

By integrating your calendar with our platform:

- Our analyzer bot **Spiky Scribe** will automatically join your meetings.
- After your meeting, you will view the analysis directly from your platform dashboard.

To connect your calendars:

1. Go to **Settings** from the bottom of the left vertical menu or by clicking on the name in the top right corner.



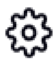
2. Click the **Integrations** tab.
3. Select the **Connect** button to connect your Google / Outlook Calendar according to your calendar of choice.

Auto Analysis

The auto analysis will help you to analyze your online recorded meetings automatically. After your meeting has ended, all you need to do is come to the platform and see the outcomes.

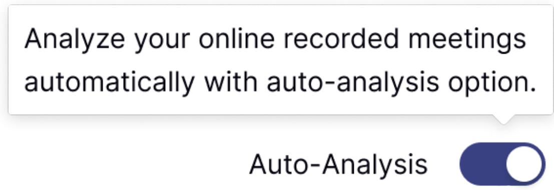
To open the auto-analysis option:

1. Go to **Settings** from the bottom of the left vertical menu or by clicking on the name in the top right corner.



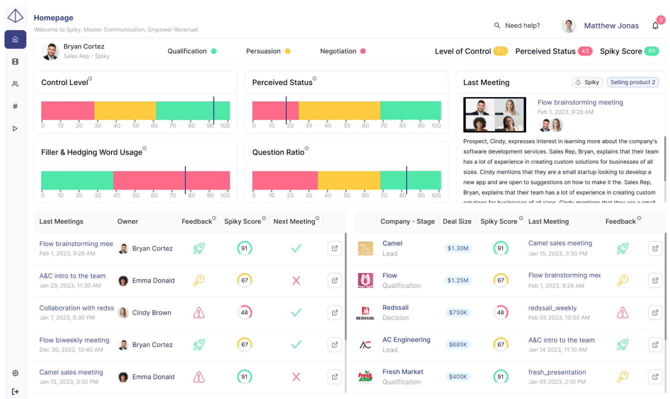
2. Click the **Integrations** tab.

3. Click on the **Auto Analysis** tab.



Platform

Homepage

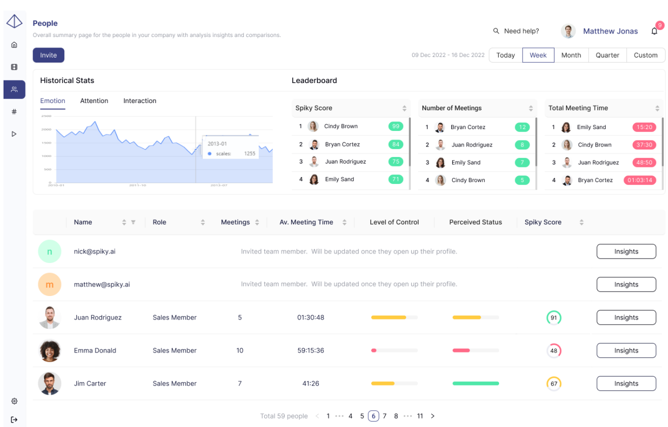


This page will be your favorite. You can access personal and deal insights with high-level auxiliary metrics to get fast insights into your daily flow.

- **General Scores:** See and understand your profile with five unique perspectives.
  - Level of Control: Weighted average of per-participant's talk ratio and question ratio.
  - Perceived Status: Perceived status refers to how an individual is perceived by others in terms of their position, power, and influence.
  - Spiky Score: Weighted average per participant's overall attention, emotion, and interaction scores.
  - Question ratio
  - Filler & Hedging Word Usage

- **Deals:** Check out the stages, and size of your deals from your CRM account with unique insights from Spiky analysis.
- **Meetings:** Access the calendar and information of upcoming meetings with analysis outputs and details to be sure to attend all of them and be prepared.
- **Most Collaborations and Deals:** Find out your most collaborative co-worker and tags.

People



Overall summary page for the people in your company with analytical insights and comparisons.

There are three main sections on this page to gain information about the progress and development of the people in this company:

- **Historical Stats:** Track people's emotional, attentional, and communicational changes within the company over time in meetings.
- **Leaderboard:** Identify and recognize your company's

highest and lowest-performing employees to provide an overview of your colleagues' performance.

- **People:** See everyone on your company's platform with unique insights and summaries.

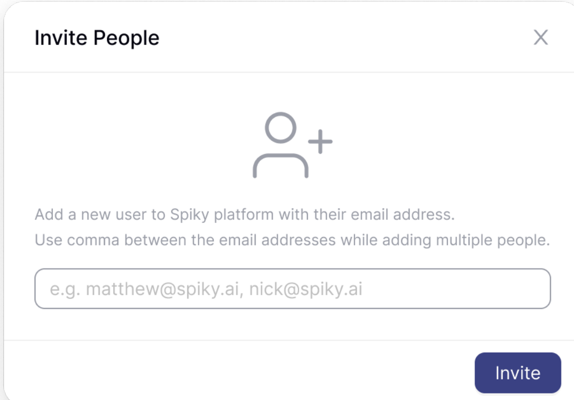
🎉 The **insights** section will be coming soon. It will give you per-person deep coaching to empower everyone uniquely with the knowledge and tools to make informed decisions about your sales strategy and performance.

Invite Your Teammates

You need to be on the people page to invite people to the platform:

1. Click the **Invite** button on the top left corner of the page.

2. Enter your teammates' email addresses.

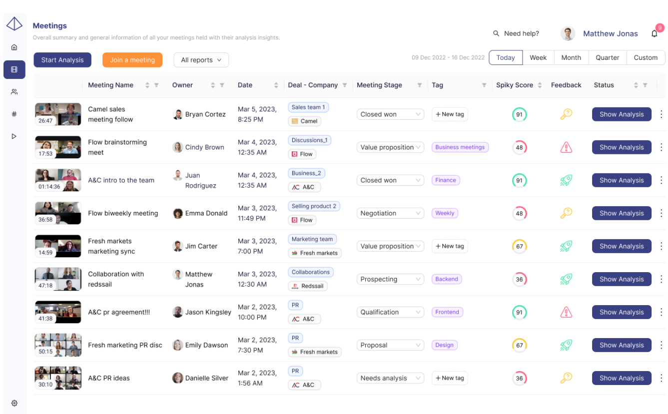


3. Click the **Invite** button to send them an invitation.

Those will receive an invitation through their email. They can enter the platform quickly by following the steps in the email.

> If you do not receive the invitation email or encounter any other problems during this process, don't hesitate to contact us through <u>support@spiky.ai</u>

Meetings



Overall summary and general information of all your meetings with their analysis insights will be shown on this page.

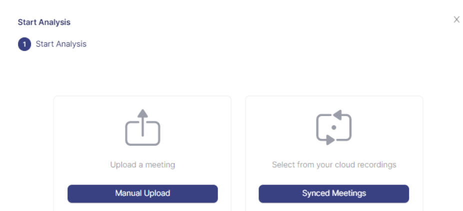
Go to the **Meetings** page from the left vertical menu to access this page.

On this page, you will see the uploaded videos to the platform with high-level information about them.

You need to be on the meetings page to start analyzing your meetings. Here are 2 options to start your analysis:

1. Click the **Start Analysis** button

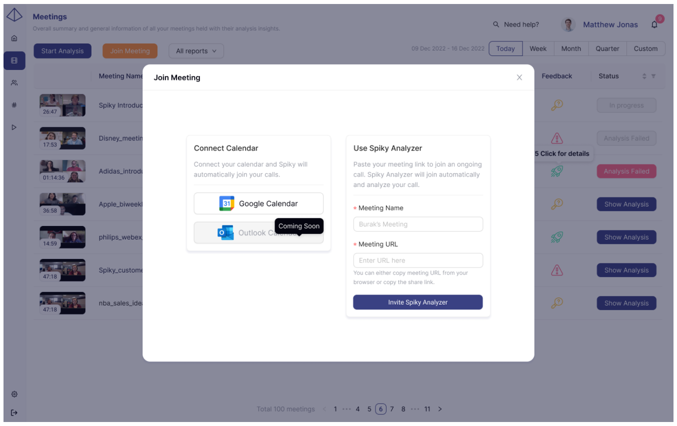
   a. Select the upload type as **<u>Manual Upload</u>** or **<u>Synced Meetings</u>**.



2. Invite Spiky Scribe to your meetings by clicking on **Join a meeting** button.

After you upload a meeting and its analysis is finished, you can see the detailed analysis by clicking the **Show Analysis** button.

Analyze Meetings - Spiky Scribe



Spiky Scribe joins your meetings and automatically prepares your meeting analyses shortly after your meeting ends.

You can invite Spiky Scribe to any video conferencing tool you prefer.

To invite Spiky Scribe :

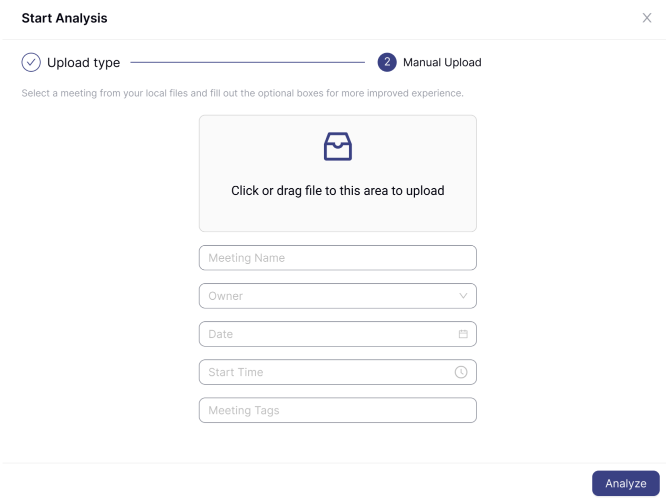
1. Click the **Join a meeting** button.
2. Enter your meeting name.
3. Copy your meeting URL.
4. Click the **Invite Spiky** Scribe button.

As soon as your meeting is over, you will see the status of your analysis as **Uploading** on the meetings page. When you refresh the page, the status will be **In progress.**

When the meeting analysis is finished, you can see the detailed analysis by clicking the **Show Analysis** button.

Analyze Meetings - Manual Upload

The manual upload option allows

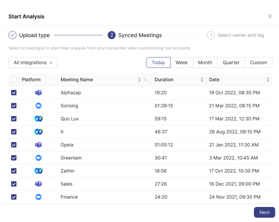


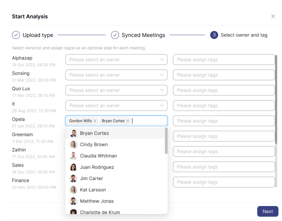
you to access your local files on your computer.

To start the analysis from your local files:

1. Click or drag a file of your meeting to upload to the platform.
2. Fill in the information boxes.
3. Click **Analyze** button.

Analyze Meetings - Synced Meetings



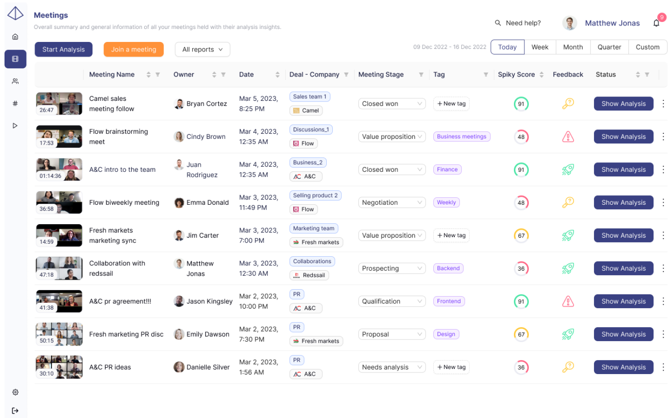


You can access your cloud recordings from the video conferencing tools you connected to the platform. If you didn’t connect any tool, please read how to utilize manual upload <u>here</u>.

To start the analysis from cloud recordings:

1. Select the meetings by checking the boxes of the rows.
2. Assign owners and tags to each meeting.
3. Click the **Next** button to continue the analysis.

Assign Owners



An owner is a person who has created or scheduled the meeting and is responsible for managing the meeting.

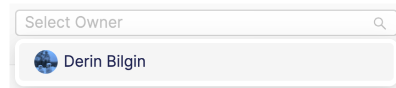
> ⚠️ To assign owners to your meetings, you need to invite them to the platform. Please read here to invite your teammates.

As the account owner, your profile will be ready on the people page. You can assign yourself as an owner to the meetings without any action.

There are two ways to assign an owner to a meeting:

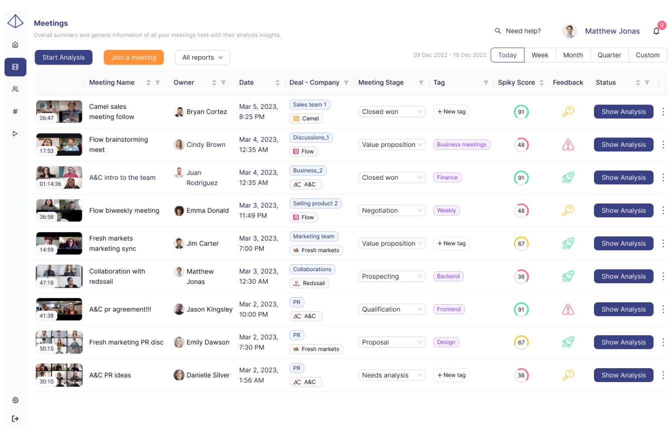
1. While you start your analysis using manual upload or synced meetings.
2. Through the table on the meetings page:
   a. Click the **+ New Owner** button.

   b. Select the owners you would like to add to the meeting.



- You can set up to 3 owners for each meeting.
- You can unassign an owner by clicking the **X** button next to their names.

Assign Tags

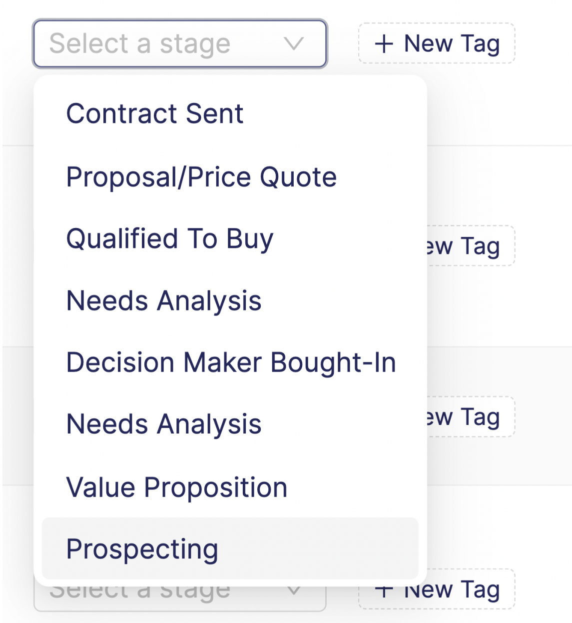


A tag is a label for the meetings to group them and see the overall analysis.

> ⚠️ To assign tags to your meetings, you need to create them. Please read here if you need to create tags.

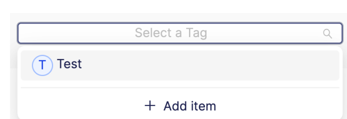
There are two ways to assign a tag to a meeting:

1. While you start your analysis by manual upload or syncing meetings.



2. Through the table on the <u>meetings</u> page: You can add 4 different types of tags to your meetings from the meeting page.
   a. Company Tags - add under the deal section.
   b. Deal Tags - add under the deal section.
   c. Stage Tags - add under the meeting stage section.
   d. Other Tags
      i. Click the **+ New Tag** button.

      ii. Select the tag you would like to add to the meeting.



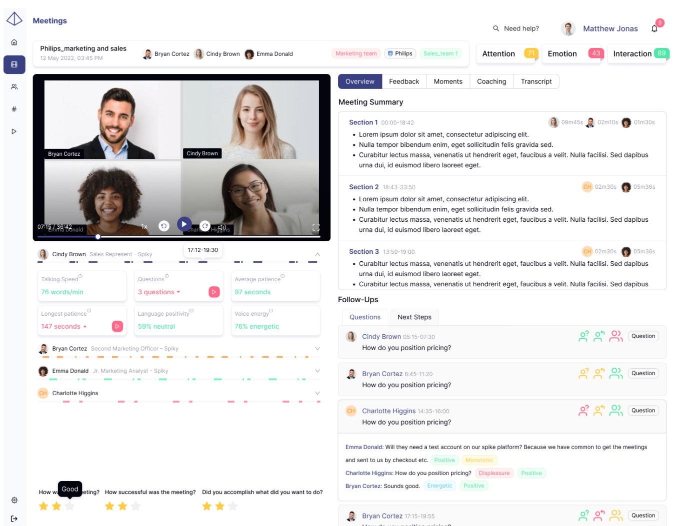
      iii. You can set up to 3 unique tags for each meeting.

- You can unassign a tag by clicking the **X** button next to their names.

Meeting Details

You can access this page through the meetings page - please read here if you need help with how to open this page.

This page has profound insights about your meeting. It can give you a more generic and accurate idea of the progress of the meeting with actionable insights and information about it - you can also rewatch your meeting.



Overview

This part of the meeting details page will give you a general overview of your meeting with the help of the meeting summary and follow-up section. These sections aim to help you remember the meeting, decrease your operation time to take notes, and listen to your customer instead of wasting your time with these actions.

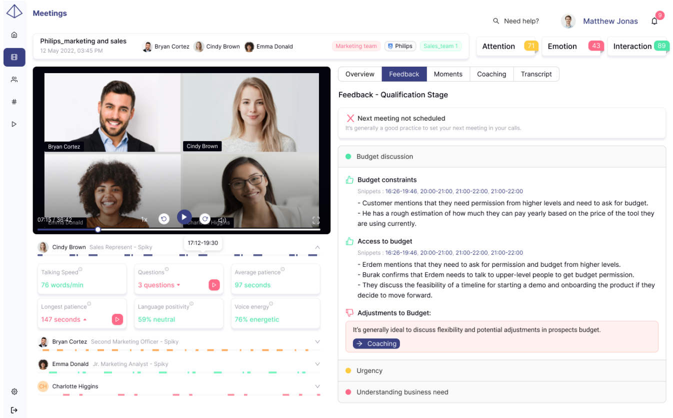
- **Meeting Summary:** Gives the summary of your meetings, divided into sections, along with participant information.
- **Follow-Ups:** Divided into two sections and shows the questions asked and mentioned next steps during the meeting.

You can also access the per-person metrics and analysis:

- **Talking speed:** Average speech tempo during the meeting.
- **Question Ratio:** Ratio of questions asked by the user during the meeting.
- **Average patience:** Average duration that a person waits to begin speaking.
- **Talk Ratio:** The ratio of a person spends talking compared to the meeting time - Talk Time/Meeting Time.
- **Language positivity:** Average positivity rate of used language during the meeting.
- **Voice emotion:** Average emotion level of the vocal tone during the meeting

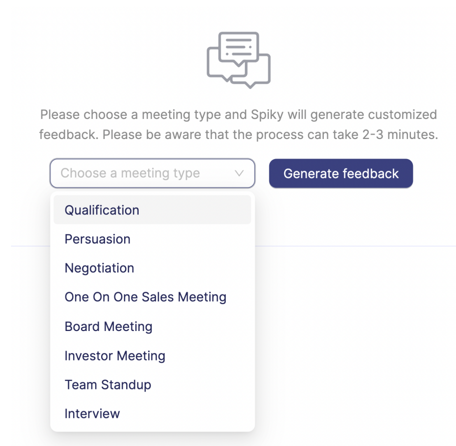
Feedback

This part of the meeting details page will give you feedback



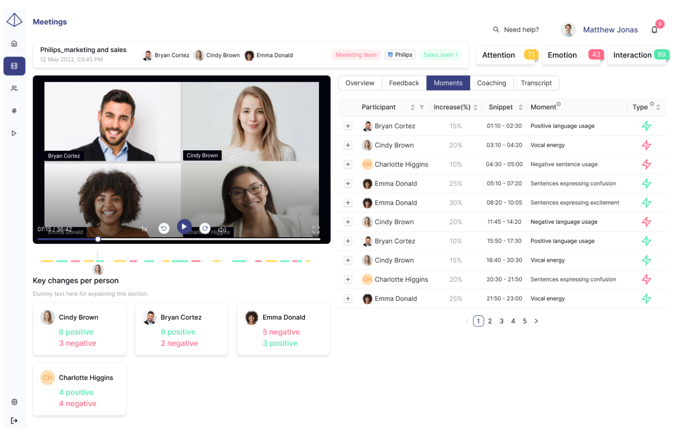
according to the meeting type.

1. Choose a meeting type.



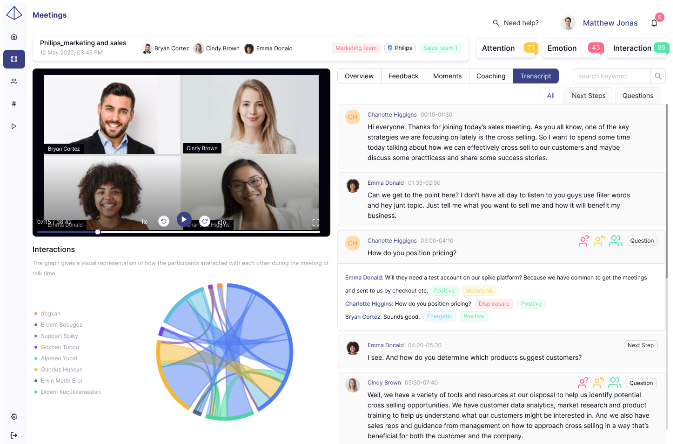
2. Click the **Generate feedback** button**.**

🎉 More meeting-type options are coming soon.



Moments

This part of the meeting details page will give you the moments of your meeting with significant changes in language usage and vocal energy. You can access these changes per person and throughout the whole meeting with the reasons.



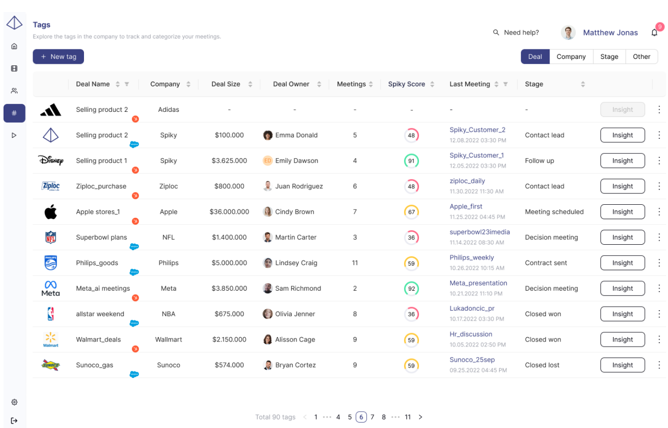
Transcript

This part of the meeting details page will give you the meeting transcript. See all transcripts, only the next steps, or only questions with the emotional effects and labels.

With the interactions graph, explore the visual representation of how the participants interacted with each other during the meeting in terms of talk time.

> 🎉 The **coaching** part of the details page will be coming soon. It will give you tips and resources about improving yourself and your meeting.

Tags



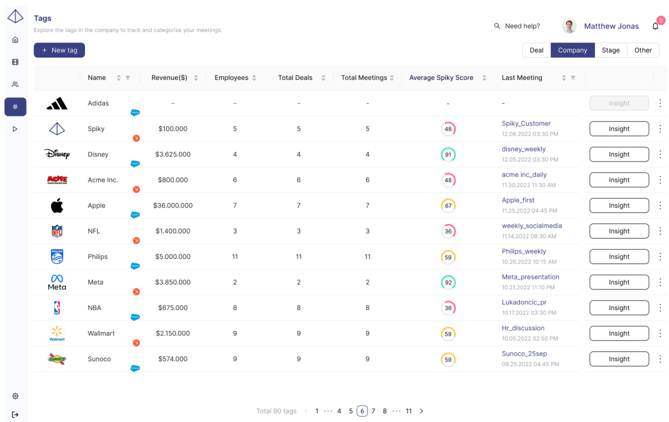
Overall summary and general information of your tags with their insights will be shown on this page.

Go to the **Tags** page from the left vertical menu to access this page.

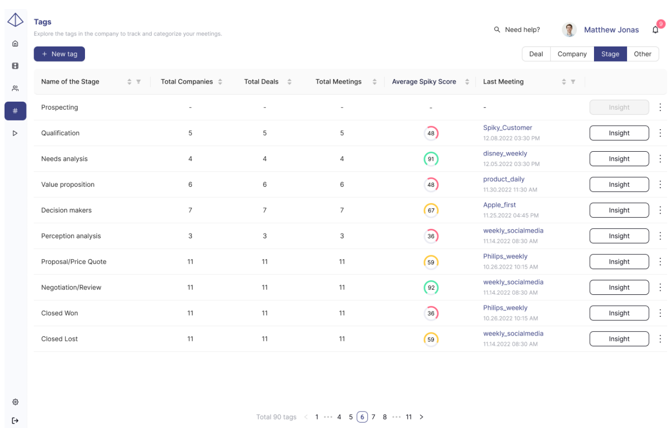
You will see the created tags with high-level information about them on this page.

There are 4 tag types:

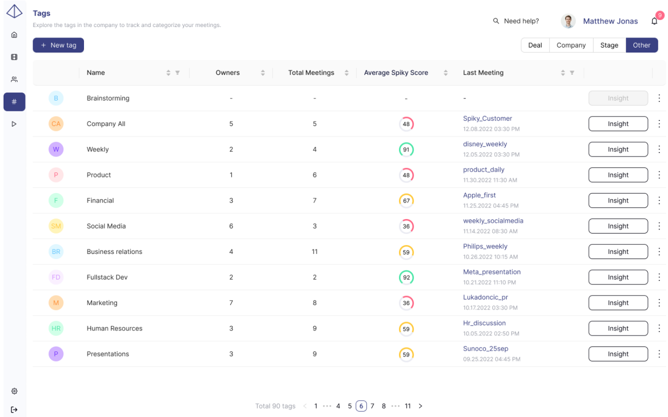
- Deal
- Company
- Stage
- Other tags



Deal Tags: See the progress of your deals with total meetings, deal size, deal owner, average Spiky score, and last meeting information



Company Tags: See the progress of your recurring meetings with different companies by total meeting amounts, average Spiky score, last meeting information, and total deal numbers.



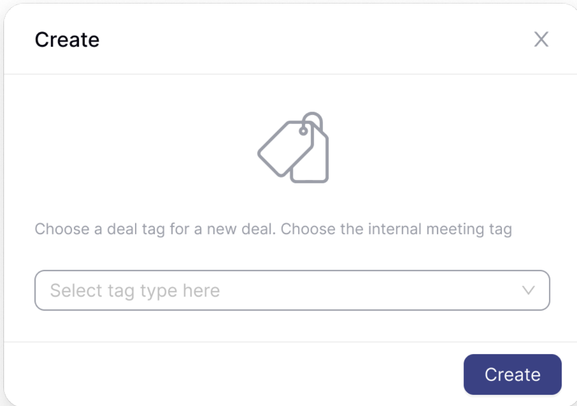
Stage Tags: Follow the number of deals and meetings you've had with different companies at each stage, along with Spiky scores.

Other Tags: Create customized tags according to your requirements and follow the number of meetings and insights along with Spiky scores.

🎉 The **insights** section will be coming soon. It will give you detailed analysis and coaching for each tag with upcoming meeting information and risk analysis to make informed decisions about your sales strategy and performance.

Create Tags

You need to be on the Tags page to



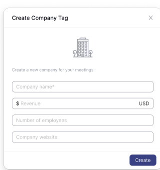
create a tag:

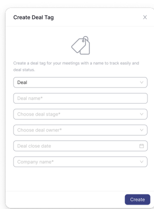
1. Click the **New Tag** button.

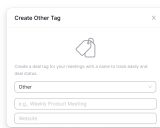
2. Select the tag type:
    a. Company
        i. Fill in the necessary information (The company name is mandatory).

        > 🌐 Enter the company website. → This will help us to generate a logo for your tag.

        ii. Click **Create** button.
    b. Deal
        i. Fill in the necessary information (Deal name, stage, close date, and company are mandatory fields).







> ⚠️ Before adding a Deal tag, the Company tag to which the deal belongs must have been added previously, and that company should be selected when creating the tag.

ii. Click **Create** button.

c. Tag

i. Fill in the necessary information (The tag name is mandatory).

ii. Click **Create** button.

💜 Thank you for choosing Spiky! We are excited to see you here and provide you with the best output for your sales-related problems.

If you need any help with your onboarding or have any questions/feedback, don't hesitate to contact us through our website or **support@spiky.ai**.

Enjoy your analytics and future sales ☺