

Start Unlocking the Power of Spiky: Onboarding Guide

Welcome aboard! We are happy to see you among us ③

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

What is Spiky? Spiky Platform Account & Settings Account Creation Sign In Forgot Your Password Set Up Your Account Integrations Auto Analysis Platform Homepage People Invite Your Teammates Meetings Analyze Meetings - Spiky Scribe

```
Analyze Meetings - Manual Upload
Analyze Meetings - Synced Meetings
Assign Owners
Assign Tags
Meeting Details
Tags
Create Tags
```

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 **AIassisted 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 <u>setting up your account</u> 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

Sign Up		
Vready have an a	account? Sign I	n
Email		
Password		
		۵
Confirm Passwo	ord	
Cr	eate Account	



To create an account

- Go to <u>app.spiky.ai</u> 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 signup, you will be directed to a confirmation screen where you are expected to type in the code you receive in your email.

Sign In

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New	to Spiky? Create Account
* Em	ie
• Par	ssword ter email here
	lemember me
	Sign In
	Sign In with Microsoft Tear



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.

Forgot Your Password Reset Password * Email Send Code Sign In Need help? Ask us at support@spiky.ai ← Back to Login

Forgot your password?

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

 \rightarrow If you forgot your password,

please click here.

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

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

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<i>₽</i> , # ▷	MJ Change of		Improve yourself while working. You want to improve yourself, but it can be orienteheling, ' but don't have enough time for yourself. You want to improv Go to Spiky blog	ou want to improve yourself e yourself but have too	
	First Name		Current password		ø
	Last Name		New password		ø
	Email Address	sample@spiky.ai	Confirm password		ø
	Company		Change Password		
	Title				
	Date and Time Format	United States v Format: December 27, 2022, 12/27/2022, 10:00 AM	A EST, and 1,234.50		
	Save Changes				
64					

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

danage yes			
Account	lategrations Apps	Salesforce ×	
Dustomips	your Spiky experience by connecting with the video conferencing tools y:	Spiky's integration with Salesforce allows us to reach your Salesforce recordings, automatically import them into the platform, and make them searchaste. By correcting your Salesforce account, you give us	Auso Analysis 🔘
81	Ocogle Calendar Google Calendar is an online calendar service offered by Google that all	permission to access your meeting recordings stored on your Selestone cloud. To connect your Salesforce account, please click the "Connect" button. Please be aware that all of your	Correct
	Outlook Calendar	Salazore volos via appar o ne parom ou via not o anayzeo una you chose, nou cannot connecto roson than one Salasforce account.	Correct
0	Outrook calendar is a personal internation management application dev	I acknowledge that Spiky will have access to my Salesfarce account with the authorized information.	Correct
00	Webex Wolaw Teams is a cloud-based team collaboration application that feature	video nextrop, messaging, file sharing and whiteboarding. The software offers a periasers virtual meeting	room for in-office and remote teams to collaborate.
uji	MS Teams Microsoft Reams, the hub for team collaboration in Microsoft SIGS, integrat		Learn how to connect
-	Salesforce Salesforce is the word's #1 customer relationship management (CHV) part		tan keep your outstonent happy everywhere.

salesfo	rce
Username	
Password	
Log In	
Remember me	
Forgot Your Password?	

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.
- Select the Connect button to connect your Webex/ Zoom/ MS Teams account according to the video conferencing tool/tools you use.

Custom CRM Tools

- Occycle Calendar
 Decomment

 Cocycle Calendar is an online calendar service offered by Cocycle that allows users to create, manage, and share events and appointments with others.
 Decomment

 Outlock Calendar is an online calendar information management application developed by Microsoft that allows users to schedule and manage appointments.
 Connect
- 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 Albased 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.
- 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.

 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:

 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.
- 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.

Analyze your online recorded meetings automatically with auto-analysis option.

Auto-Analysis

Platform

Homepage

Φ	Homepage Welcome to Splicy, Master Communication, Empower F	levenuel							Q. Nee	i help? 🔮 Matt	hew Jonas	0
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	A&C intro to the team Jon 29, 2023, 11:30 AM	æ	67	×	8	Ø	Flow Qualification	\$1.25M	67	Flow brainstorming mer Feb 1, 2023, 9:28 AM	ø	ø
	Collaboration with redss 🚯 Cindy Brown Jan 7, 2023, 5:30 PM		(4)	~	ø	REDSOAR	Redssall Decision	\$750K	48	redssail_weekty Feb 05 2023, 10:00 AM	⚠	ø
	Flow biweekly meeting Dec 30, 2022, 10:40 AM	\$2	(67)	~	ø	Æ	AC Engineering Lead	\$685K	67	A&C intro to the team Jan 14 2023, 1110 AM	\$2	ø
© [+	Carnel sales meeting Jan 15, 2023, 3:30 PM		(91)	x	ø	***	Fresh Market Qualification	\$400K	(91)	fresh_presentation Jan 05 2023, 2:10 PM	ø	ø

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.

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	\bigcirc^+	
Add a new user	r to Spiky platform with thei	ir email address.
Use comma be	etween the email addresses	while adding multiple peopl
		/ ai
e.g. matthe	ew@spiky.ai, nick@spiky	(• CI I

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 a	nd general information of all you	r meetings held with thei	analysis insights.				Q. Need help?	3	Matthew Jona	s 0
Start Analysi	s Join a meeting	All reports v			09	Dec 2022 - 16 Dec 2022	Today Week	Month	Quarter	Custom
	Meeting Name $\Rightarrow \tau$	Owner \Rightarrow \mp	Date 0	Deal - Company $ \pi $	Meeting Stage	Tag v	Spiky Score 🔅	Feedback	Status	¢Ψ
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1753	Flow brainstorming meet	🐧 Cindy Brown	Mar 4, 2023, 12:35 AM	Discussions_1	Value proposition	Business meetings	48)	⚠	Show Analy	sis
01:14:36	A&C intro to the team	Juan Rodriguez	Mar 4, 2023, 12:35 AM	Business.2 AC A&C	Closed won	Finance	(91)	\$	Show Analy	sis
35.50	Flow biweekly meeting	👩 Emma Donald	Mar 3, 2023, 11:49 PM	Selling product 2	Negotiation	Weekly	48)	ø	Show Analy	sis
14:50	Fresh markets marketing sync	🙎 Jim Carter	Mar 3, 2023, 7:00 PM	Marketing team	Value proposition	+ New tag	(67)	S	Show Analy	sis
47:18	Collaboration with redssail	Matthew Jonas	Mar 3, 2023, 12:30 AM	Collaborations	Prospecting	Backend	36)	S	Show Analy	sis
41:38	A&C pr agreement!!	Jason Kingsley	Mar 2, 2023, 10:00 PM	PR AC ASC	Qualification	Fromend	(91)		Show Analy	sis
50:15	Fresh marketing PR disc	👔 Emily Dawson	Mar 2, 2023, 7:30 PM	PR Fresh markets	Proposal	Design	67	\$	Show Analy	sis
32:10	A&C PR ideas	🚯 Danielle Silver	Mar 2, 2023, 1:56 AM	PR AC ABC	Needs analysis	+ New tag	36)	Þ	Show Analy	sis

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</u>
 <u>Meetings</u>.



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

Join Meeting

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

🕢 Upload type 🛛 —		2 Manual Upload	
Select a meeting from your lo	cal files and fill out the optional boxes for more	improved experience.	
	Click or drag file to this a	area to upload	
	Meeting Name		
	Owner	~	
	Date		
	Start Time	0	
	Meeting Tags		

you to access your local files on your computer.

To start the analysis from your local files:

- 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

art A	laaliysis			×	Start Analysis
) up	oload type		Synced Meetings	(3) Select owner and tag	🕑 Uplaad type ———— 🕑 Synced Meetings ——— 🔕 Select owner
hect a r	meetingbi to at	tert their analysis from your	connected video conferencing tool accounts.		Select severabli and analysis tapbil as an optional step for each meeting.
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	46	Sales	27.26	16 Dec 2021, 09:00 PM	SA NEW 2021, DEDD FM
	۰	Finance	24/20	24 Nov 2021, 09:30 PM	Mathew Jones
				Next	Charlotte de Khurs

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

Start Analysis	Join a meeting	All reports v			0	9 Dec 2	2022 - 16 Dec 2022	Today Wee	k Month	Quarter	Cust
	Meeting Name $\Rightarrow \tau$	Owner 0 T	Date 0	Deal - Company $ au$	Meeting Stage	т 1	fag ⊤	Spiky Score 0	Feedback	Status	0.1
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17.53	Flow brainstorming meet	🚯 Cindy Brown	Mar 4, 2023, 12:35 AM	Discussions_1	Value proposition		Business meetings	48)	⚠	Show An	natysis
01:14:36	A&C intro to the team	Iuan Rodriguez	Mar 4, 2023, 12:35 AM	Business_2 AC ALC	Closed won		Finance	(91)	\$2	Show An	hatysis
36.50	Flow biweekly meeting	👩 Emma Donald	Mar 3, 2023, 11:49 PM	Selling product 2	Negotiation		Washly	48	ø	Show An	haiysis
14.59	Fresh markets marketing sync	🕵 Jim Carter	Mar 3, 2023, 7:00 PM	Marketing team	Value proposition		+ New Leg	(67)	\$	Show An	hatysis
47.18	Collaboration with redssall	Matthew Jonas	Mer 3, 2023, 12:30 AM	Collaborations	Prospecting		Backend	36)	\$	Show An	alysis
41.38	A&C pr agreement!!	Jason Kingsley	Mar 2, 2023, 10:00 PM	PR AC ASC	Qualification		Frontiend	(91)	⚠	Show An	natysis
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	A&C PR ideas	Oanielle Silver	Mer 2, 2023, 1:56 AM	FR ASC	Needs analysis		+ New tag	36)	ø	Show Ar	natysis

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 <u>here</u> 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:

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

+ New Owner



Select Owner	Q

- 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

\Diamond	Meetings Overall summary a	nd general information of all you	r meetings held with thei	ranalysis insights.					Q. Need help?	👔 k	latthew Jon	as d
a B	Start Analysis	Join a meeting	All reports v				09 De	o 2022 - 16 Dec 2022	Today Week	Month	Quarter	Custom
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	30.10	A&C PR ideas	🚯 Danielle Silver	Mar 2, 2023, 1:56 AM	PR AC A&C	Needs analysis		+ New tag	36	P	Show Ana	ilysis
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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 <u>here</u> if you need to create tags.

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

 While you start your analysis by <u>manual upload</u> or <u>syncing</u> <u>meetings</u>.

Select a stage V + New Tag
Contract Sent
Proposal/Price Quote
Qualified To Buy w Tag
Needs Analysis
Decision Maker Bought-In
Needs Analysis 🔋 🕺 Tag
Value Proposition
Prospecting

- 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.

	Select a Tag	Q
T Test		
	+ Add item	

- 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 <u>meetings</u> page - please read <u>here</u> 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

						Q, Nei	ed help?	3	Matthe	w Jonas
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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

()	Tags Explore the ta	igs in the company to track	and categorize your me	etings.				Q, Nee	d help? 👔 Ma	itthew Jonas 🖉
8	+ New!	ag l							Deal Company	Stage Other
8		Deal Name 💠 🗉	Company 🗘	Deal Size 💠	Deal Owner 💠	Meetings 0	Spiky Score 🔅	Last Meeting $\ \ \forall$	Stage ¢	
	<i>h</i> .	Selling product 2	Adidas							
⊳	\Diamond	Selling product 2	Spiky	\$100.000	👩 Emma Donald	5	48)	Spiky_Customer_2 12.08.2022 03:30 PM	Contact lead	Insight :
	Discop	Selling product 1	Spiky	\$3.625.000	🐵 Emily Dawson	4	(91)	Spiky_Customer_1 12.05.2022 03:30 PM	Follow up	Insight :
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	Ś	Apple stores_1	Apple	\$36.000.000	🔒 Cindy Brown	7	67	Apple_first 11.25.2022 04:45 PM	Meeting scheduled	Insight :
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@ [+					Fotal 90 tags < 1	- 4 5 6 7 8	· ··· 11 >			

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.

	Name 😄 🗉	Revenue(\$) 0	Employees 0	Total Deals 😄	Total Meetings 0	Average Spiky Score 0	Last Meeting 0 T	
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\Diamond	Spiky	\$100.000	5	5	5	48)	Spiky_Customer 12.08.2022 03:30 PM	Insight
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ACHE	Acme Inc.	\$800.000	6	6	6	48)	acme inc_daily 11.30.2022 11:30 AM	Insight
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6	Philips 🐡	\$5.000.000	11	11	11	(59)	Philips_weekly 10.28.2022 10:15 AM	Insight
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200	Sunoco	\$574.000	9	9	9	59	Sunoco_25sep 09.25.2022.04:45 PM	Insight

9. Need help?

Deal Company Stage Oth

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Total Deals \Leftrightarrow Total Meetings \Leftrightarrow Average Spiky Score \Leftrightarrow Last Meeting \Leftrightarrow \forall

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(59) (92)

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Total 90 tags < 1 ... 4 5 6 7 8 ... 11 >

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Tags

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+ New tag

Closed Won

Closed Lost

Name of the Stage 🔅 🔻 Total Companies 🔅

There are 4 tag types:

- Deal
- ٠ Company
- Stage ٠
- 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.

+ New tag					Deal	Company Stage Oth
	Name	0 T Owners	Total Meetings	Average Spiky Score 🛛 🗘	Last Meeting	\$ T
в	Brainstorming					Insight
CA	Company All	5	5	48)	Spiky_Customer 12.08.2022 03:30 PM	Insight
w	Weekly	2	4	(91	disney_weekty 12.05.2022 03:30 PM	Insight
Р	Product	1	6	48	product_daily 11.30.2022 11:30 AM	Insight
F	Financial	3	7	67)	Apple_first 11.25.2022 04:45 PM	Insight
SM	Social Media	6	3	36)	weekly_socialmedia 11.14.2022-08:30 AM	Insight
BR	Business relations	4	11	(59)	Philips_weekly 10.26.2022 10:15 AM	Insight
FD	Fullstack Dev	2	2	(92)	Meta_presentation 10.21.2022 11:10 PM	Insight
м	Marketing	7	8	38)	Lukadoncic_pr 10.17.2022 03:30 PM	Insight
HR	Human Resources	3	9	(59)	Hr_discussion 10.05.2022 02:50 PM	Insight
P	Presentations	3	9	(50)	Sunoco_25sep 09.25.2022 04:45 PM	Insight

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

	$\langle 2 \rangle$	
Choose a deal tag for	a new deal. Choose the internal	meeting tag
Select tag type h	ere	\vee
		Create

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Create a deal tag for your meetings with a deal status.	name to track easily and
Deal	

Create Other Tag)
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Create a deal tag for your meetings with a re leal status.	are to track easily and
Draze a cleal tag for your meetings with a n load status.	are to track easily and
Course a deal tog for your meetings with a m test status. COMER o.g., Weekly Product Meeting	are to track easily and

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
 - 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.

1

- 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 <u>website</u> or **support@spiky.ai**.

Enjoy your analytics and future sales \odot