6sense Sales Intelligence Enterprise
Admin Checklist

Data Settings

(1) Technographic Data

Add relevant technologies such as competitors and integration partners to arm sellers with information on accounts that may be a tech fit or for competitive takeout scenarios

- 6sense will track when an account is using any technologies you specify

(2) Keywords

Add keywords that represent content research being done around your brand, competitors, customer pain points, and more. Sellers will be able to gauge the account's interests.

- 6sense will capture research being done at the account level along with location data
- *Recommend a minimum of 10-20 generic and 5-10 branded keywords*

(3) Job Titles

Enter job titles that are relevant to your sales team to help them see whether an organization is growing.

- 6sense will detect job postings for accounts and how long ago the jobs were posted

(4) Psychographic Data

Select terms or phrases companies mention across their digital footprint. Did they mention industry-related topics that are relevant to your products or services?

- 6sense will monitor an account's digital footprint for any terms or phrases you identify

Learn More

Keywords represent content research from a network of B2B websites

Branded: your products/brand and your competitors

Generic: broader, topical industry related terms, and buyer's pain points

Keywords are NOT Google Search terms!

Re-order Data

- Arrange technologies, job titles, and psychographs to show in a specific order for sellers

Data Updates & Refresh

- Technographics, job titles, keywords, and psychographs take 24-48 hours to update in 6sense SI
- Data is refreshed every 2-4 weeks

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Sales Intelligence Settings

(1) Persona Map

Customize to show key job levels and functions to help sellers uncover gaps

- 6sense will categorize CRM/MAP contacts/leads and new contacts into job level and function, show engagement data and importance

(2) Privacy Data Control

Set rules to restrict people profile data that pertain to privacy policy laws

- 6sense will not show sellers any people profiles from regions you specify

(3) SI Actions

Control actions your sellers can take such as exporting, LinkedIn, Sales Navigator options and more

(4) Components & Metrics

Enable or disable certain tabs, opportunity information and more to display only relevant insights to sellers

(5) Activities

Customize which engagement and reach activities to display to sellers such as web activity, form fills, sales calls, marketing campaigns and more

(6) Talking Points

Set rules to customize talking points based on persona to display for sellers

(7) Alerts

Set parameters around the types of intel sellers can receive via alerts which include specific URLs, intent activities and contact engagement

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6sense SI integrates with the following CRMs: SFDC, HubSpot CRM, and MS Dynamics

Invite Sellers

- Once setup is complete, invite your sellers and assign credits

Authentication

- Users will receive an email to set up their password
- If your org has SSO enabled, users will be automatically provisioned when they log in for the first time
- *Roles will be assigned by default for the SI App and ABM Platform. Review and adjust as needed*

Learn More

Knowledge Base Articles:

- SI Settings
- Data Settings

Live Trainings and Additional Resources:

- Admin Quick Start Page
- AE Quick Start Page
- BDR Quick Start Page