# 6sense Sales Intelligence Enterprise Lite
# Admin Checklist

## Data Settings

### (1) Relevant Technologies

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*

## 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

## 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 to show in a specific order for sellers

## Data Updates & Refresh

- Technologies and keywords take 24-48 hours to update in 6sense SI

**CRM Integration:**

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

### ( 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

### Invite Sellers & Assign Credits

Once setup and models are 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