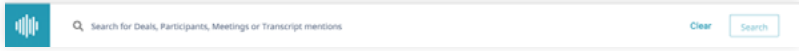
4 Ways You Can Use Chorus for Customer Handoffs

CHORUS

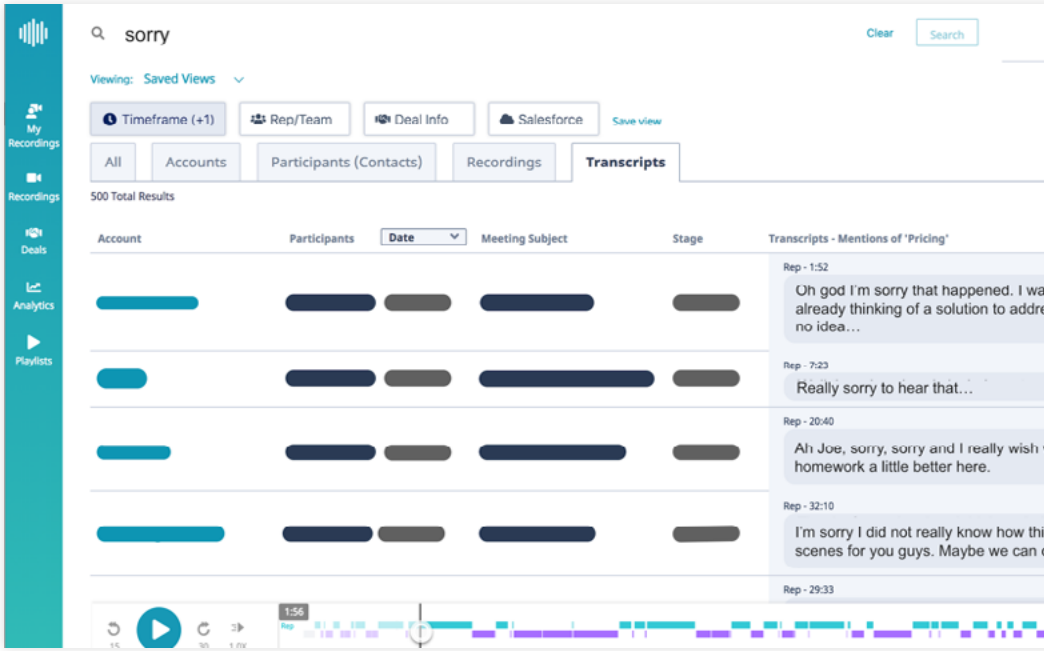
1 Discover handoff problem areas

It is important that you understand how your current handoff process is working. It's best if you address a problem only if it actually exists and is affecting internal efficiency, win rates or the customer's experience. With all your calls recorded in Chorus, you can search and seek out instances of poor customer experience.



Things to look for:

- Customer frustration words like "already", "however", "poor", "told", "not ideal", "frustrating"
- Rep handoff markers like "BDR", "customer success", "CSM", "post-sale", "demo meeting" or apology words like "sorry", "apologize", "feedback", etc.



In the search results, click on the transcripts tab, to discover conversations where the keyword appears in talk tracks.

When you find a relevant transcript bubble (where the prospect expresses frustration or discontent) click on the bubble and the call starts playing at the moment when the rep says "sorry". You can then scroll back or forward to get more context.

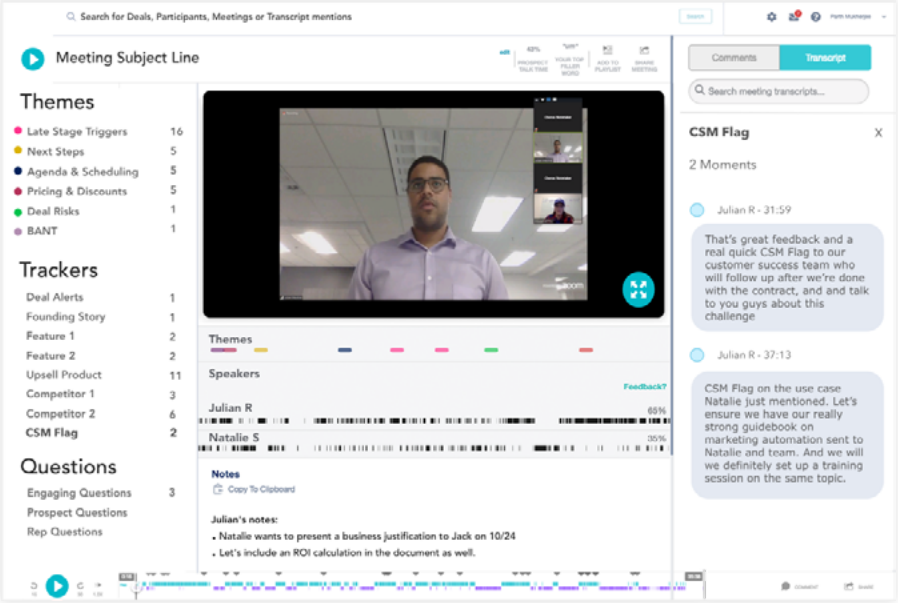
This is a great way to understand where your handoff process can be improved. If you realize that multiple customer success reps are apologizing for their kickoff content not being customized or relevant, then you know the AE to CSM communication needs to be formalized or improved.

2 Set up handoff trackers

You also have to make it easy for a downstream rep to find the most important moments from previous interactions. It's quite easy for a rep to listen to a four-minute cold call made by the SDR. However, think of a CSM who wants to know how the prospect would prefer their training content to be customized or which use cases to focus on. If there are about 10 different call recordings between the AE and the prospect, how exactly would the CSM know which call and which moment to listen to?

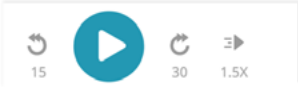
Identify a term that SDR, AE, CS teams can use to refer to the other team and set up trackers for all these terms. Train the reps to use the right term at the right moment. As an example -

- "Discovery Flag" or "Pain Point Flag" for the SDR to say on a cold call that the AE can focus on or for the AE to say on a meeting where there is feedback for the SDR
- "Onboarding Flag" or "CSM Flag" for the rep to surface key moments that will be relevant post sale
- "Expansion Flag" or "AE Flag" for the CS rep to call out a possibility for the sales rep to grow the account.



Now all a rep has to do is click on the relevant tracker on the left menu ("CSM Flag" in the above image) and jump directly to the moment when that topic was bookmarked. Voila! Now, you can listen to the key moments to tailor the customer experience.

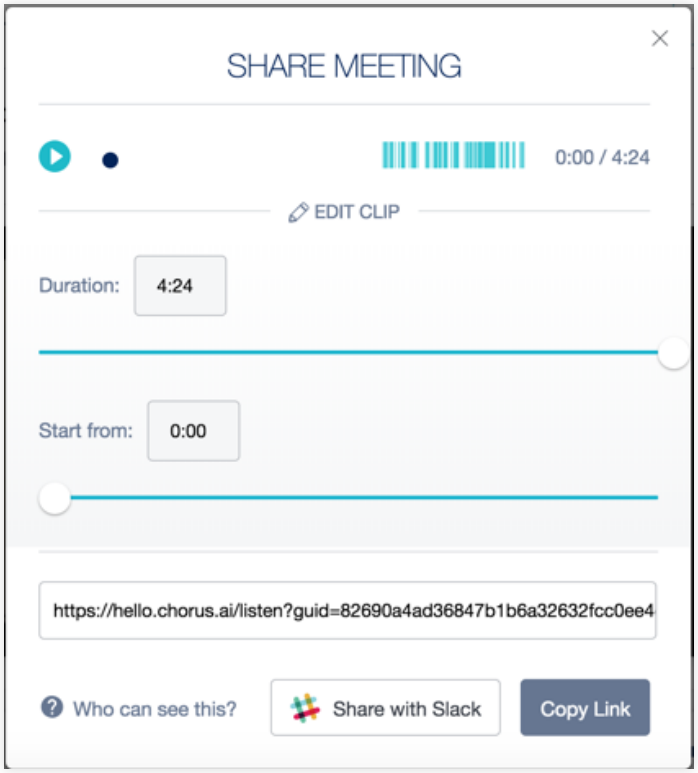
Another tip: If you don't want to spend hours listening to such moments, speed up to 1.5 to 2x the normal speed of the recording and save time.



3 Clip calls and share moments internally

If a rep knows the relevant moments that a different team might benefit from, they can create shorter clips and share it with them. This helps prepare better for the next step with a customer.

This is easy to do. Just drag the little playing bar to the start of the clip. . Then click "Share Meeting" option on the top right to launch the "Share meeting" popup. Drag the duration bar to the duration you need and copy the link.



Once the clip is ready - either share it via Slack or just copy and paste the link into an email or instant messaging client that you use.

4 Leave post-meeting feedback with tagged comments

Once you are done with a customer call, you may want to leave insights and feedback for the rep who will follow you in the next step of the customer journey. Instead of clipping and sharing moments, you can directly enter comments into the portion of the meeting you think the next rep needs to know of.

After a discovery meeting, an AE may also leave feedback for the SDR. E.g.

- For a qualified meeting: Say thank you and mention what worked well.
- For a disqualified meeting: What could the SDR have done differently or better to qualify in the future? @mention the SDR manager in the comment to increase alignment.

About Chorus.ai

Chorus.ai is a Conversation Intelligence Platform that records, transcribes, and analyzes business conversations in real-time to coach reps on how to become top performers. With Chorus.ai more reps meet quota, you ramp new hires faster, coach the existing team effectively, and everyone in the organization can collaborate over the actual voice of the customer.

Chorus.ai is funded by Emergence Capital and Redpoint Ventures and is headquartered in San Francisco, US.

Learn more at www.chorus.ai