Nudges on web via Carter to boost sales performance and help them close more leads faster

New Age Notifications

What is Nudge?

A nudge is a contextual push notification that is aimed at deriving action from receivers. It is generated by the system based on various parameters that are of interest to the business. These parameters can be a combination of multiple factors like location, business rules, time period, and others, which are clubbed together to create Nudge. For instance, we can alert a sales executive or a regional manager if the sales in his territory are trending downwards for the past few days via web and mobile nudges.

Why use Nudge?

To achieve better business outcomes : Communicating effectively and promptly to agent, Companies need systems and that is where the nudge framework fits in.
Personalised : It has been discovered that brands who personalise their nudges leads to an increase of open rates to roughly 800 percent.
Customised : Draw attention to key information on any page, by creating your own Custom Nudges.

Increase sales and sign ups by up to 15% using nudges. Industries that have seen success with Nudges include:

- **EduTech**
- **Banking**
- **Financial Services**
- **Insurance**

3.5x
increase in sales conversions

40%
sales lift in some product areas

3x
lift in customer engagement scores

20%
decrease in customer churn rates

Source : Abaka, Medium, Dista.ai, Convertize, Wizgo & Nudgify

How does Nudge work?

1

Nudges connector is **installed** using valid credentials

2

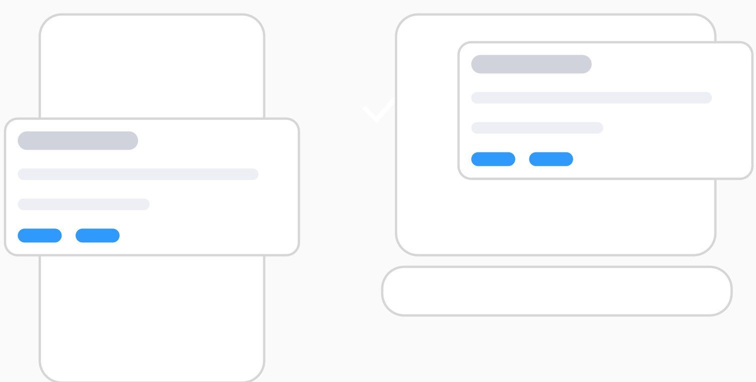
Need to **select recipients** from list for the nudges

3

Nudges template or custom nudge is set along with actions

4

Nudges received on target **web and mobile devices**



LeadSquared's Nudges Connector

Nudges help sales reps achieve goals above and beyond their baseline level of performance. Navigate through a sales process with gentle nudges on Mobile. Easy to set-up with pre-defined nudges template & customised nudges as per your sales process using custom templates via automations. Improve your sales reps' performance by sending personalised nudges. Increase sales, engagement and conversions with personalised and customised nudge templates.

Whether your goal is lower churn, more revenue or to improve overall process, nudges are often a low-effort, high-reward way of making that happen.

The LeadSquared Nudge Connector sends nudges to your user's Web and mobile devices for various events, such as Lead Create, Upcoming Tasks, New Opportunity Creation, Activity Completion, etc. Through this connector, you can help your users achieve their goals by sending reminders and important updates as nudges. You can customise nudges with templates that include text as well as images.

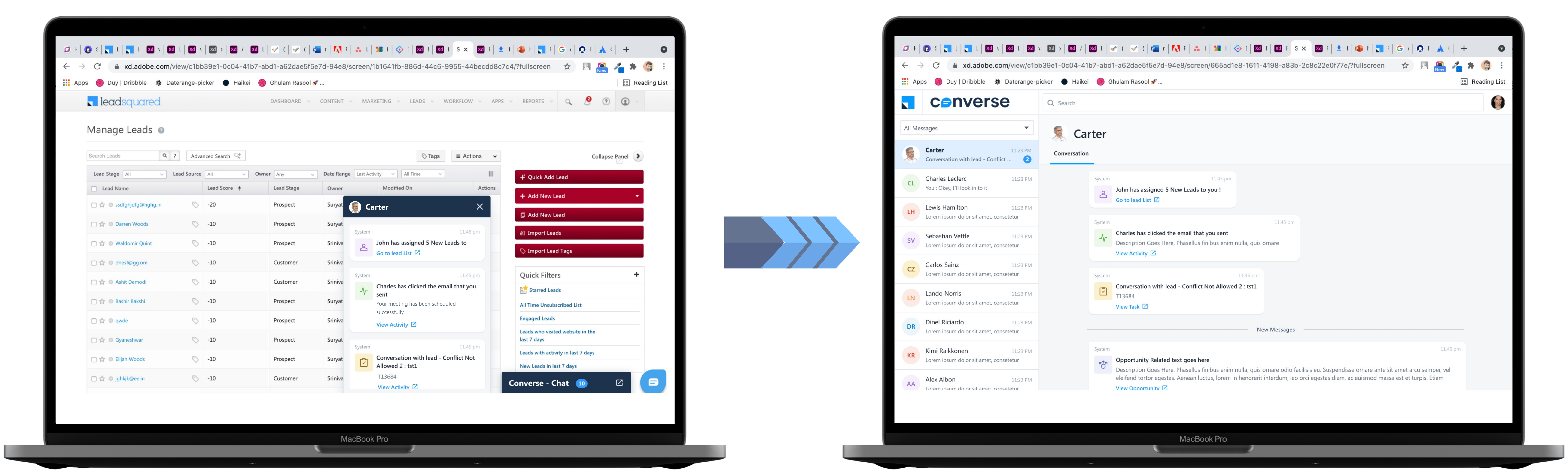
What can the integration do?

- **Boost Sales Team Performance:** Boost sales performance by pushing information or reminders on web via Carter and mobile to your reps, as and when they need it.
- **Close more leads:** Help your sales reps close more deals by nudging them with reminders and important updates.
- **Engage your Sales Team:** Engage your Sales users and help them prioritise key tasks with custom messages, program highlights and policy updates.
- **Personalised Nudge:** Send personalised nudges to each sales rep via Automation trigger on Leads/Opportunities to nudge to help them close more deals

Digital Sales Mentor

What is Carter?

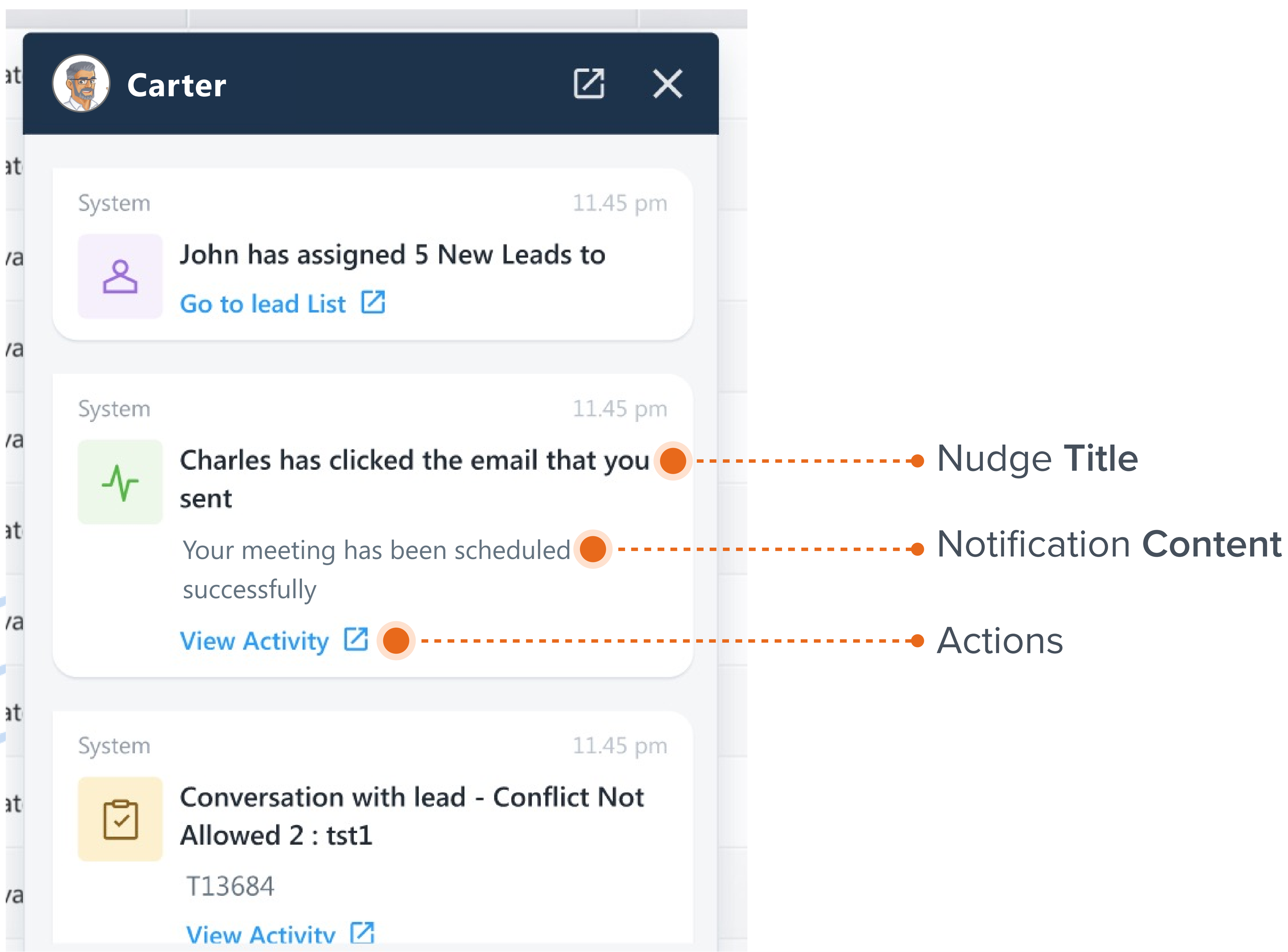
Do you need help with connecting to your customers? To stay on top of things? To collaborate better with your team? Carter is the perfect solution for your needs. Carter is Leadsquared's very own AI sales assistant. It keeps on sending you notifications about all the happenings and upcoming events. Earn your sales team's trust by using website notifications intelligently and at relevant moments throughout their journey.



Pre-requisites for Carter

- For using Carter via Nudges Connector, you need to have enablement of Carter for your org.
- Once Carter is enabled for your org, you can activate it from the ‘Carter Settings’ section of Nudges connector configuration.
- Make sure you select ‘Web’ as platform while creating a custom template to be sent as web notification.

Notification and Nudges - via Web and Carter



- Framework to send Micro-communication reminders and Notifications for your **field sales reps** to perform **actions** to close more deals
- **Customised nudges** such as New Opportunity, John has visited demo page, submitted a form – Potential Buyer, high value account visits web-site and So on via **Automation workflow**.
- **Rich and Personalised Push Notifications:** Personalised title and content with **merge fields**, button and click actions etc.
- **Pre-defined Nudges**: Easy to get started, One click set-up within minutes
- Nudges on **Web & Carter**

Setting up Nudges Connector with LeadSquared

Below are simplified instructions on how to use the LeadSquared’s Nudges Connector. For a detailed walkthrough please visit:
https://help.leadsquared.com/nudges-connector/

LeadSquared

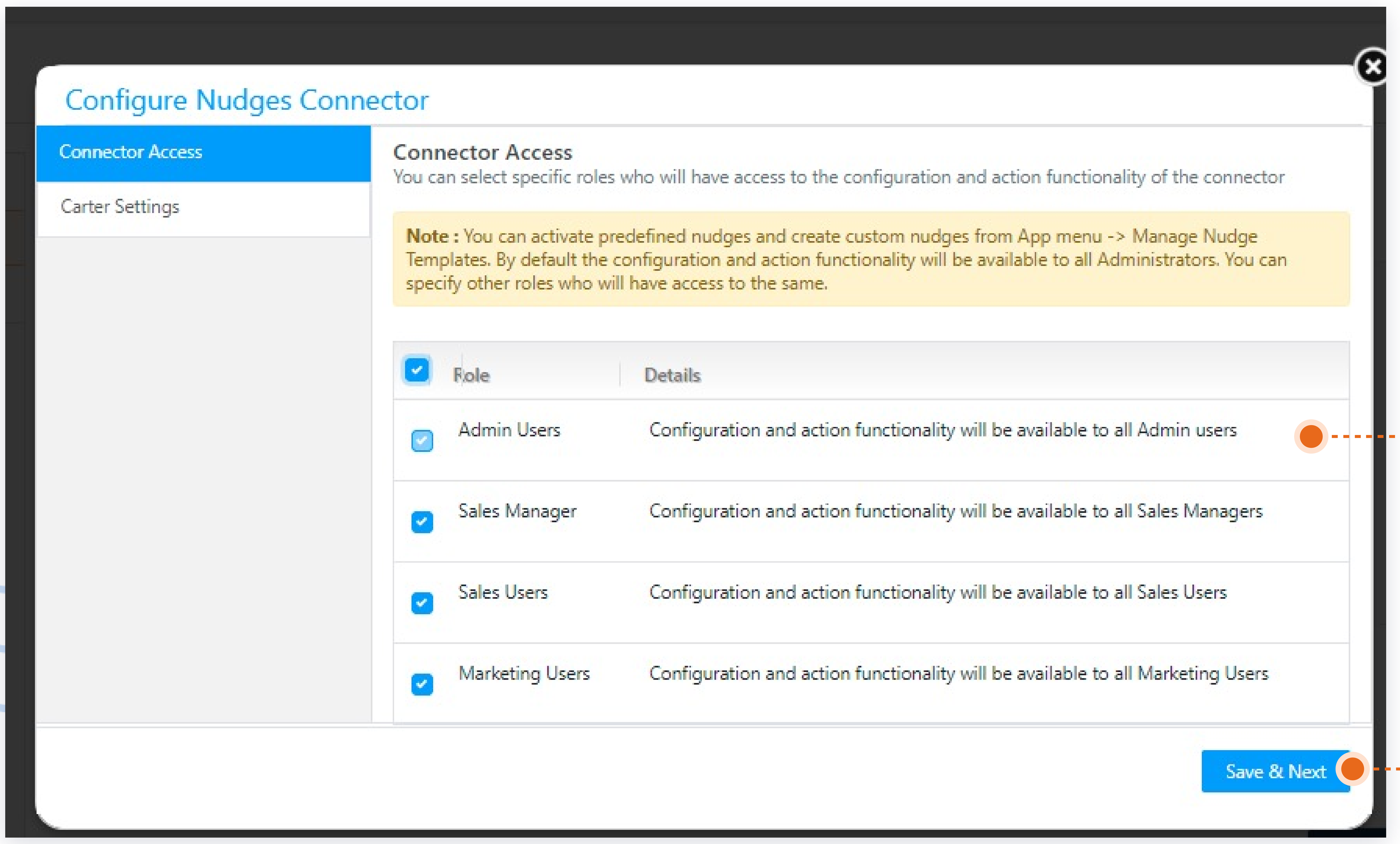
Step 1 : Installing the connector

To install the Nudges Connector on your LSQ account –

From the main menu, navigate to **Apps>Apps Marketplace** and search for **Nudges Connector,** and click **Install**. You'll also find the connector on the left panel, under **Custom**. Once the connector is installed, hover your cursor over the settings icon, and click **Configure**.

Connector Access

On the **Configure Nudge Connector** pop-up, click the checkbox against the user roles for which you want to give connector configuration and actions permission. By default, **all the permissions are granted for the Admin User role**. If you choose to not give permissions to other user roles, then skip this step, and directly go to next step.

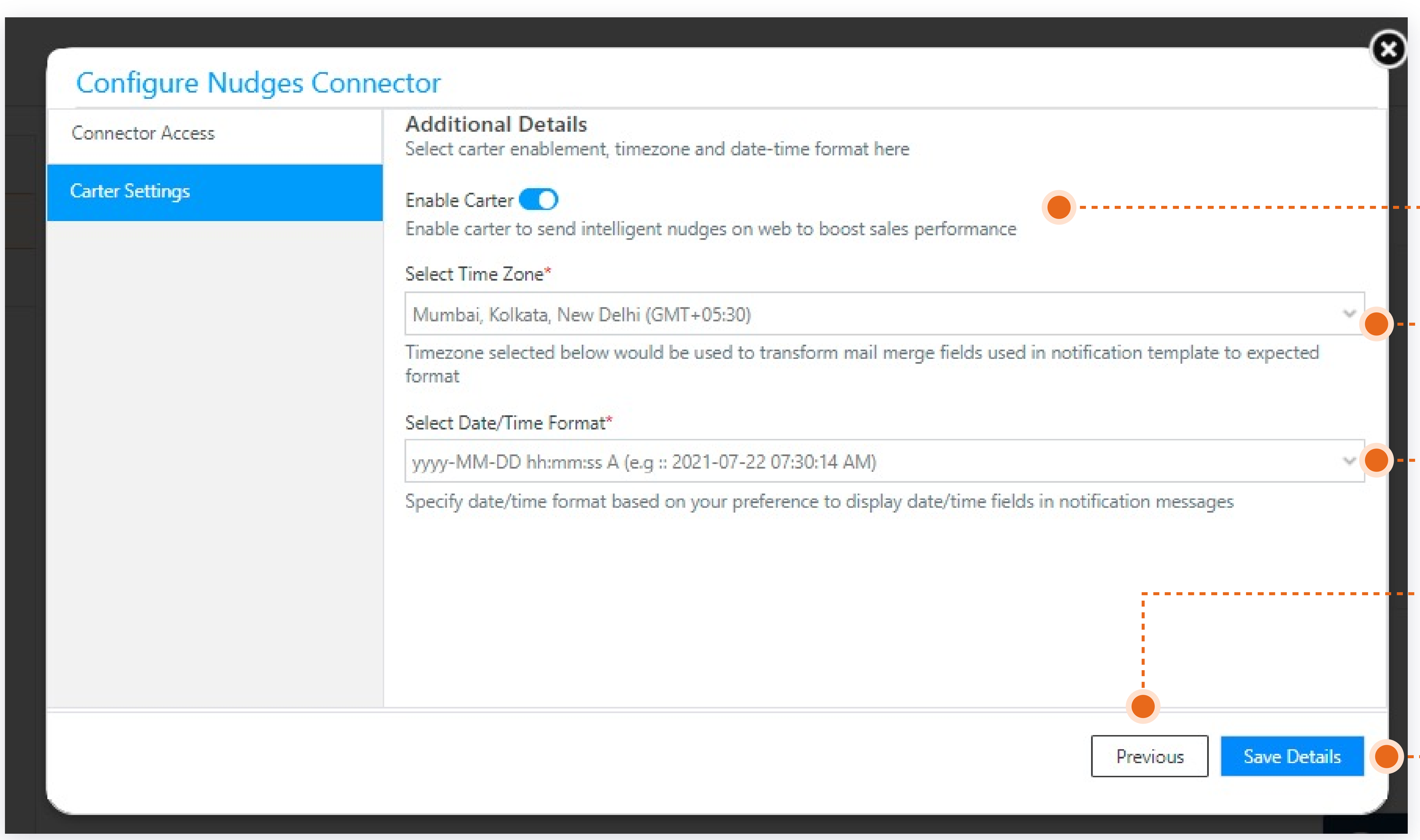


Admin User - By default, all the permissions are granted

Save & Next- For moving to next step, Carter Settings

Carter Settings

If Carter is not subscribed for the account, users won't be able to enable Carter in this step. If subscribed, users are advised to enable it using the switch. Users need to select preferred timezone and date-time format in this step too. Once you're done, click **Save Details**. The connector is successfully installed.



Enable Carter - For sending Web Notifications, Carter will have to be enabled from this section

Preferred timezone and Date-time format

Previous - For moving to previous step, Connector Access

Save Details- For saving the configuration

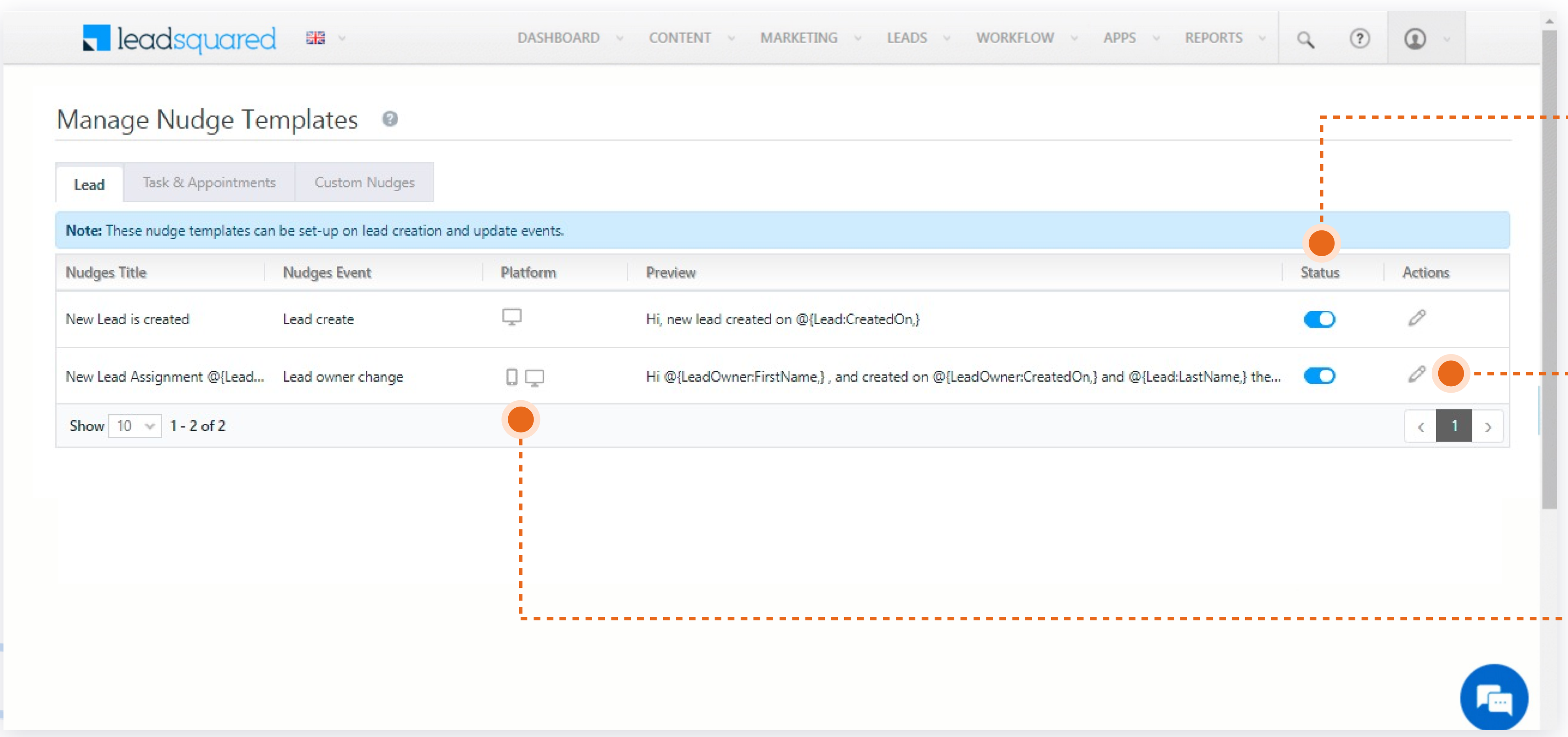
Step 2 : Manage Default Templates

Once the connector is installed, you must configure and enable nudge templates. The following pre-defined nudge templates are available on the Manage Default Nudge Templates page -

1. Lead Create
2. Lead Owner Change (Update)
3. Task Create
4. Task Update
5. Task Reminder

Predefined Nudges List

To enable and manage the pre-defined nudge templates for leads and tasks navigate to **Apps>Manage Nudge Templates**.



Enablement - To enable a template, under Status, enable the slider

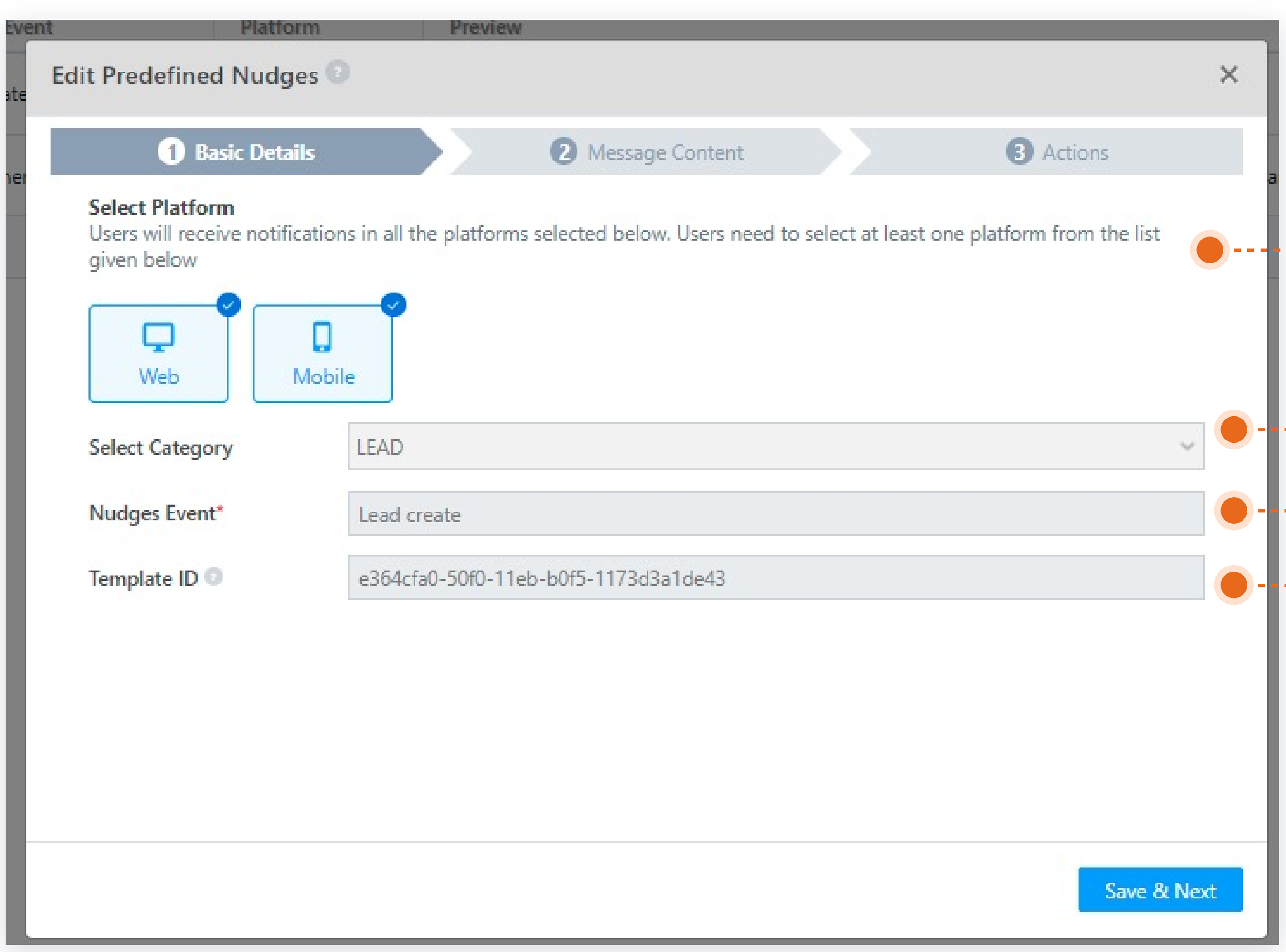
Edit the template - Under Actions, click Edit icon

Platform - Icons to show the platform for which the nudge can be sent

Edit Predefined Nudges

Basic Details

Platform Selection, Category Selection, Nudges event and Template ID etc. will be shown in this section.

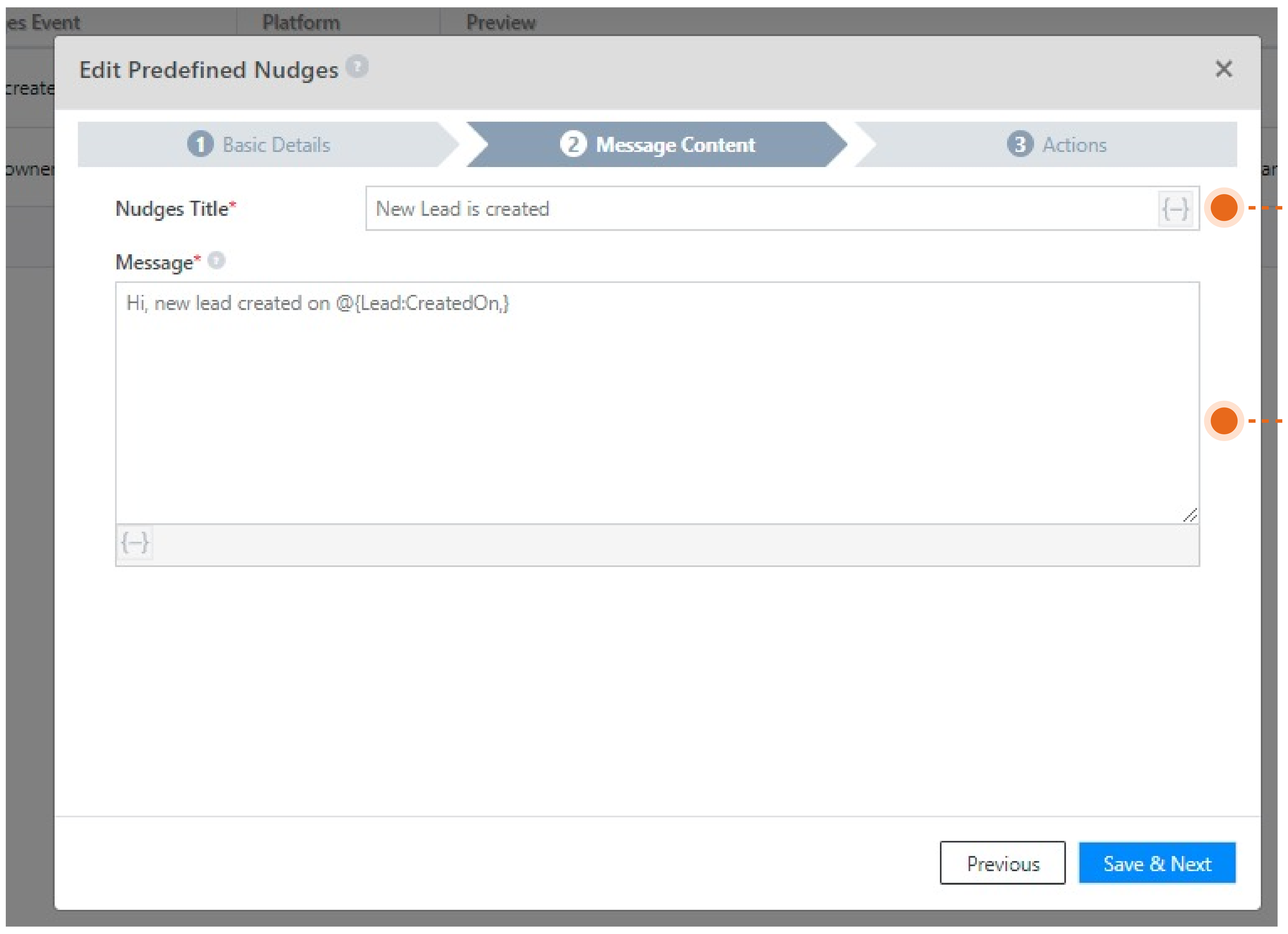


Platform Selection - For users to receive notifications in the platforms selected

Category, Nudges Event and Template ID - Not Editable

Message Content

Nudges Title and Message Content can be edited from this section

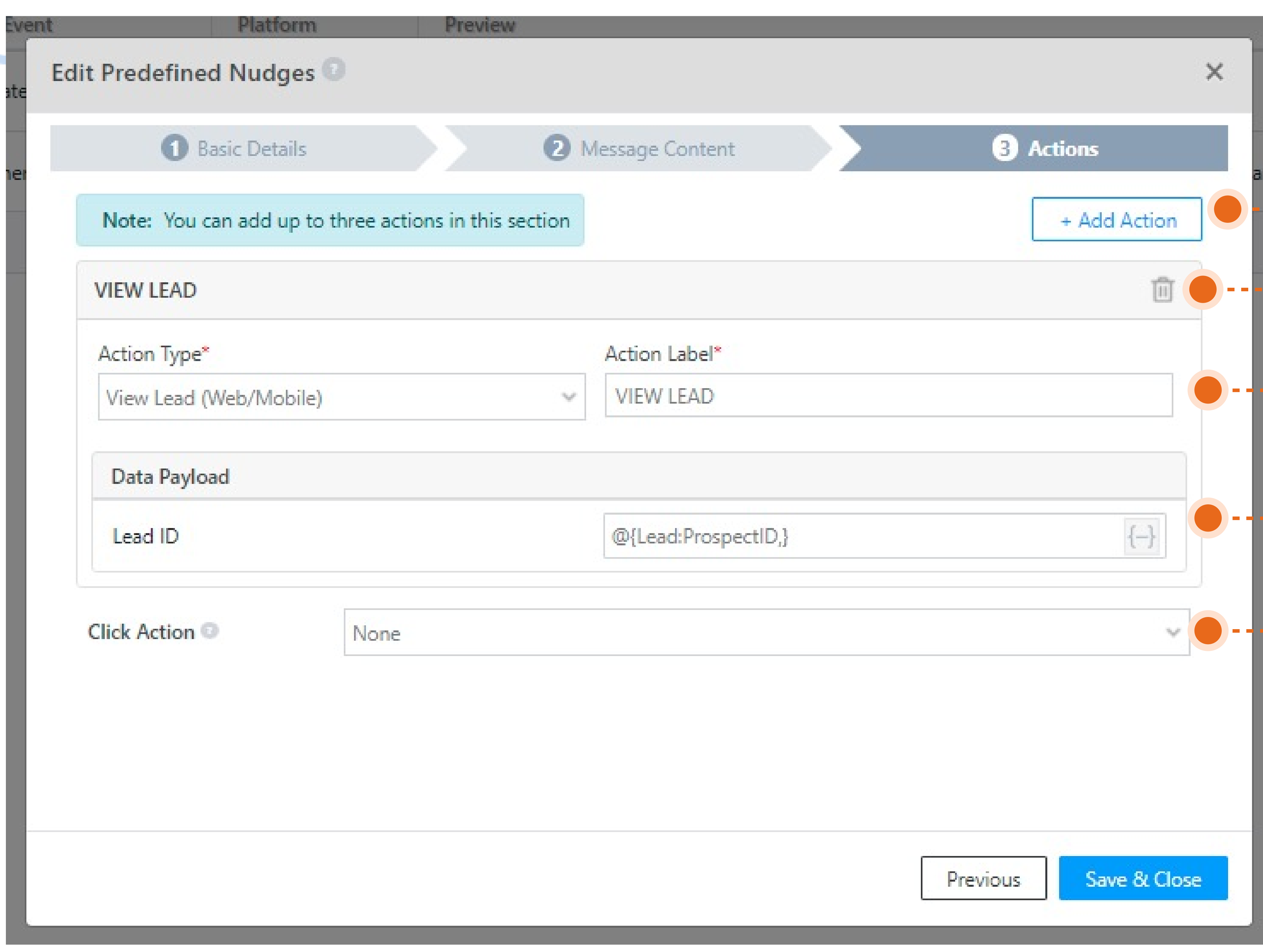


Nudges Title - Users can either type the title, or can select using the parameters

Message - Message content or notification content is the content which is used the describe the context to user. This can be custom typed or users can select parameters from the list

Actions

The actions that your users can perform through the nudge notification. These actions will redirect your users to the selected screen within the LeadSquared.



Add Custom Action

Remove/Delete Action

Action Type and Action Label

Data Payload

Click Action

Action Type – From the dropdown, select the actions you want your user to perform.

Action Label – The display name of the action.

Data Payload - For each action, we've already configured the required parameters to pass in the notification payload. You don't need to edit the payload, unless your implementation requires you to send certain parameters in place of the default ones.

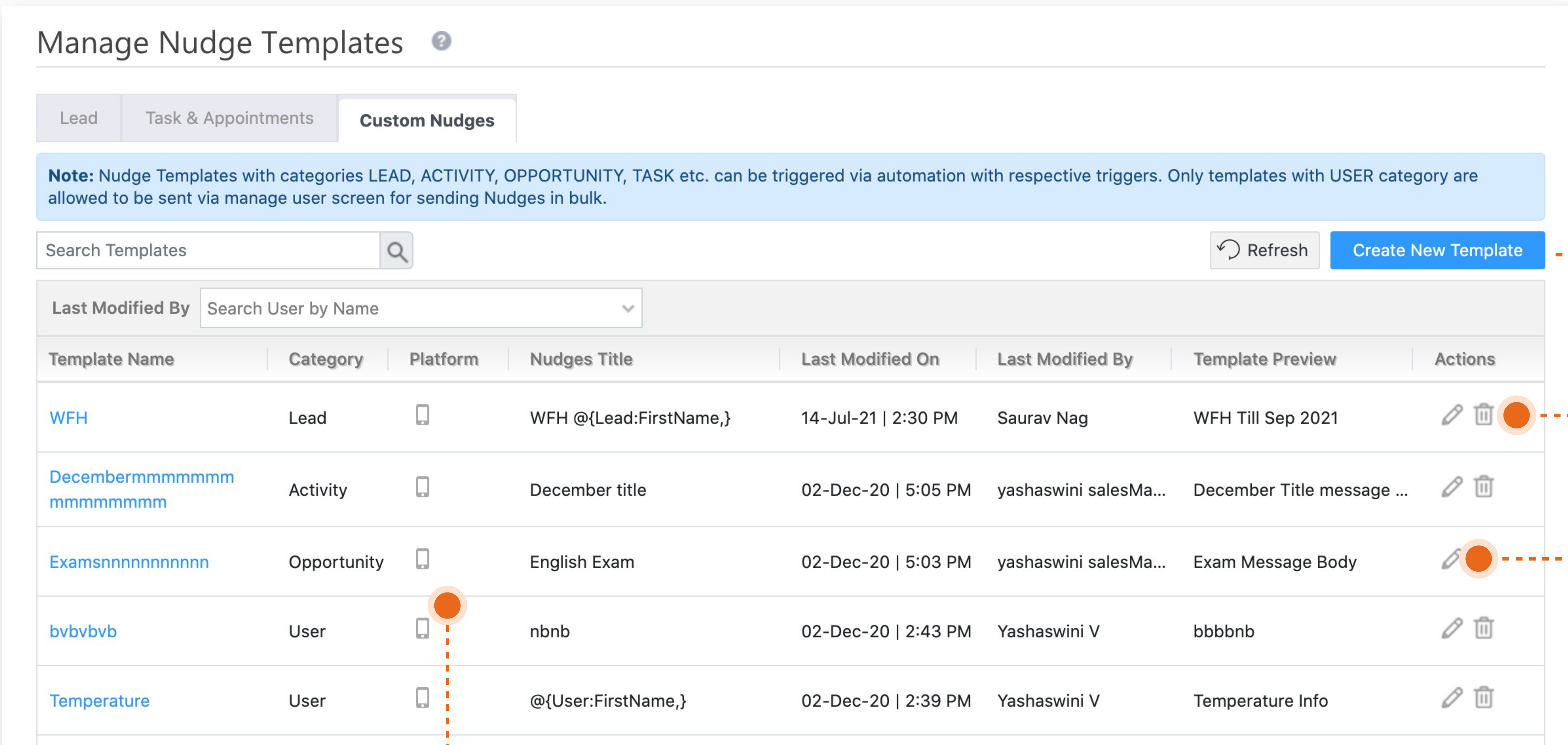
Click Action - From the Actions you've selected, only one action can be set as the Click Action. clickable in the nudge notification. The click action will be performed when a user taps anywhere on the nudge notification.

Step 3 : Manage Custom Templates

You create custom nudge templates, besides the pre-defined templates listed above. These templates can be created on events not listed in the previous section, such as Opportunity Creation, User Check-Out, etc.

Step 3.1 Create Custom Template

- To create a custom nudge template, navigate to **Apps>Manage Nudge Templates.**
- On the **Manage Nudge Templates** page, under the **Custom Nudges** tab, click **Create New Template.**



New Template Creation

Delete the template - Under Actions, click Delete icon

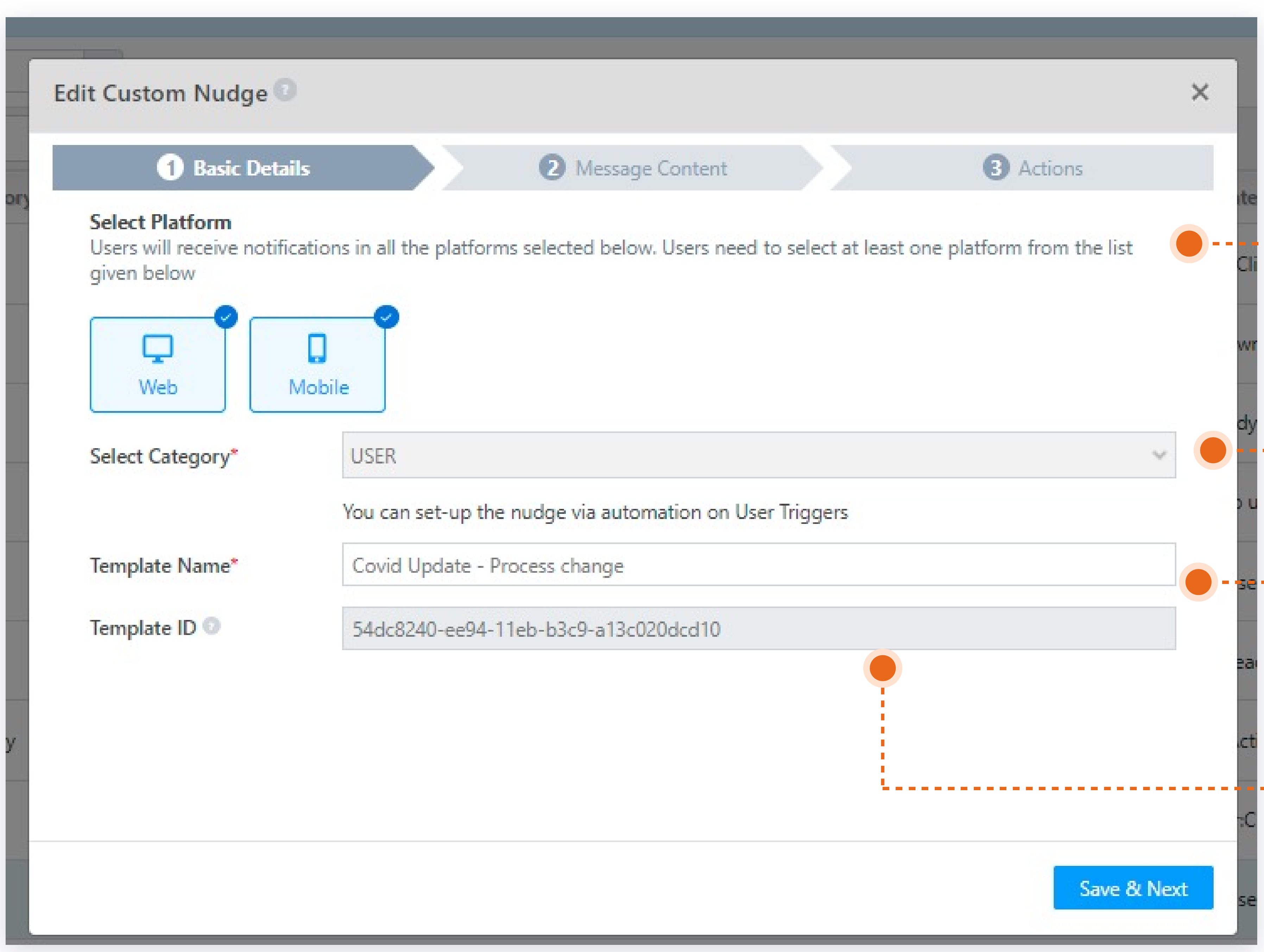
Edit the template - Under Actions, click Edit icon

Platform - Icons to show the platform for which the nudge can be sent

Add or Edit Custom Nudges

Basic Details

Platform Selection, Category Selection, Nudges event and Template ID etc. will be shown in this section.



Platform Selection - For users to receive notifications in the platforms selected

Category Selection - Once selected and saved, can't be changed later

Template Name

Template ID

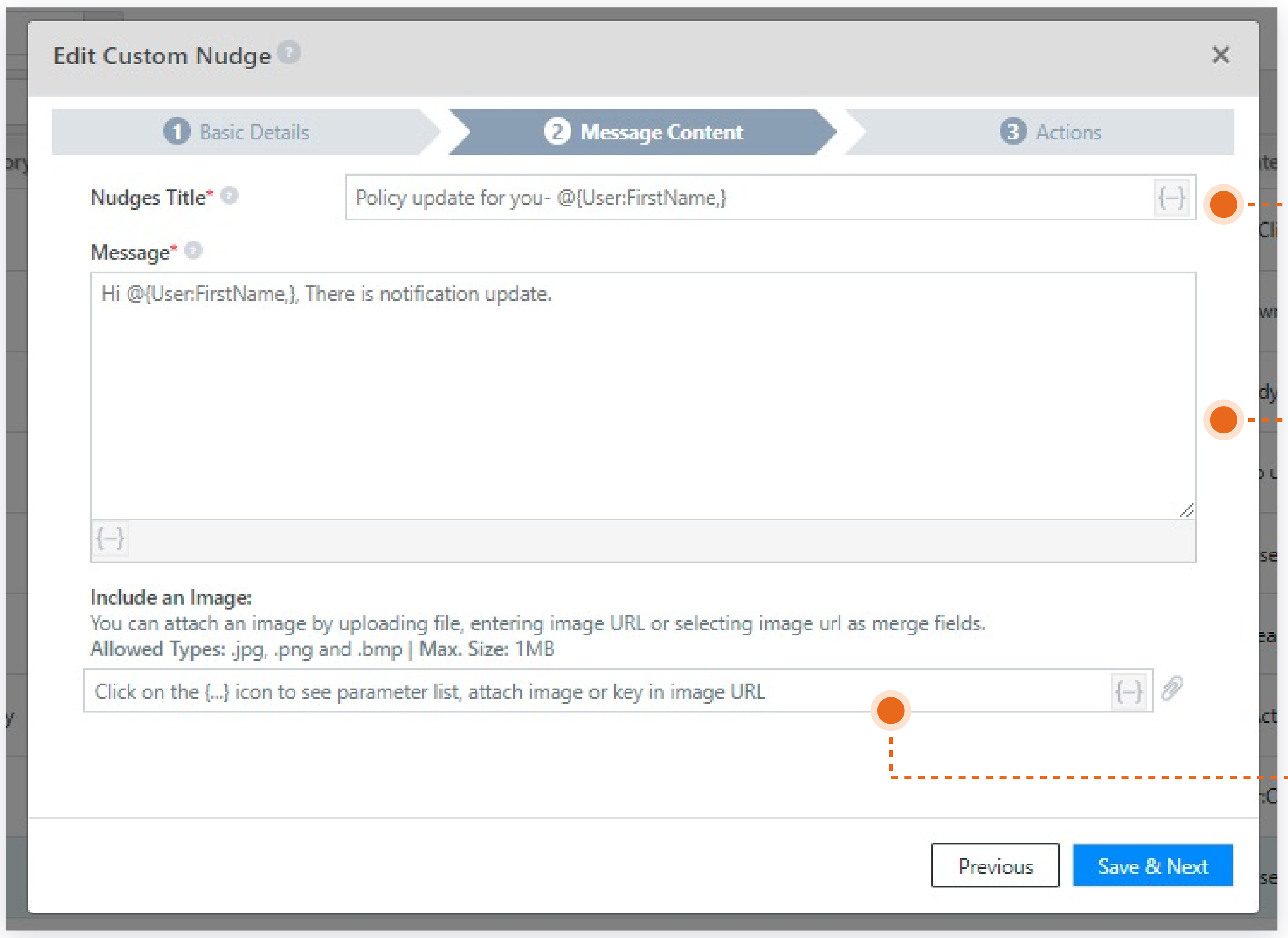
1. Select Platform - From the given two options i.e Web and Mobile, users need to select one or both. Users will receive notifications in all the platforms selected.

2. Select Category - From the Select Category dropdown, select the category (Leads, Opportunity, Activity, Task, and User) under which you want to create a nudge.

3. Template Name - The display name for the template.

Message Content

Nudges Title and Message Content can be edited from this section



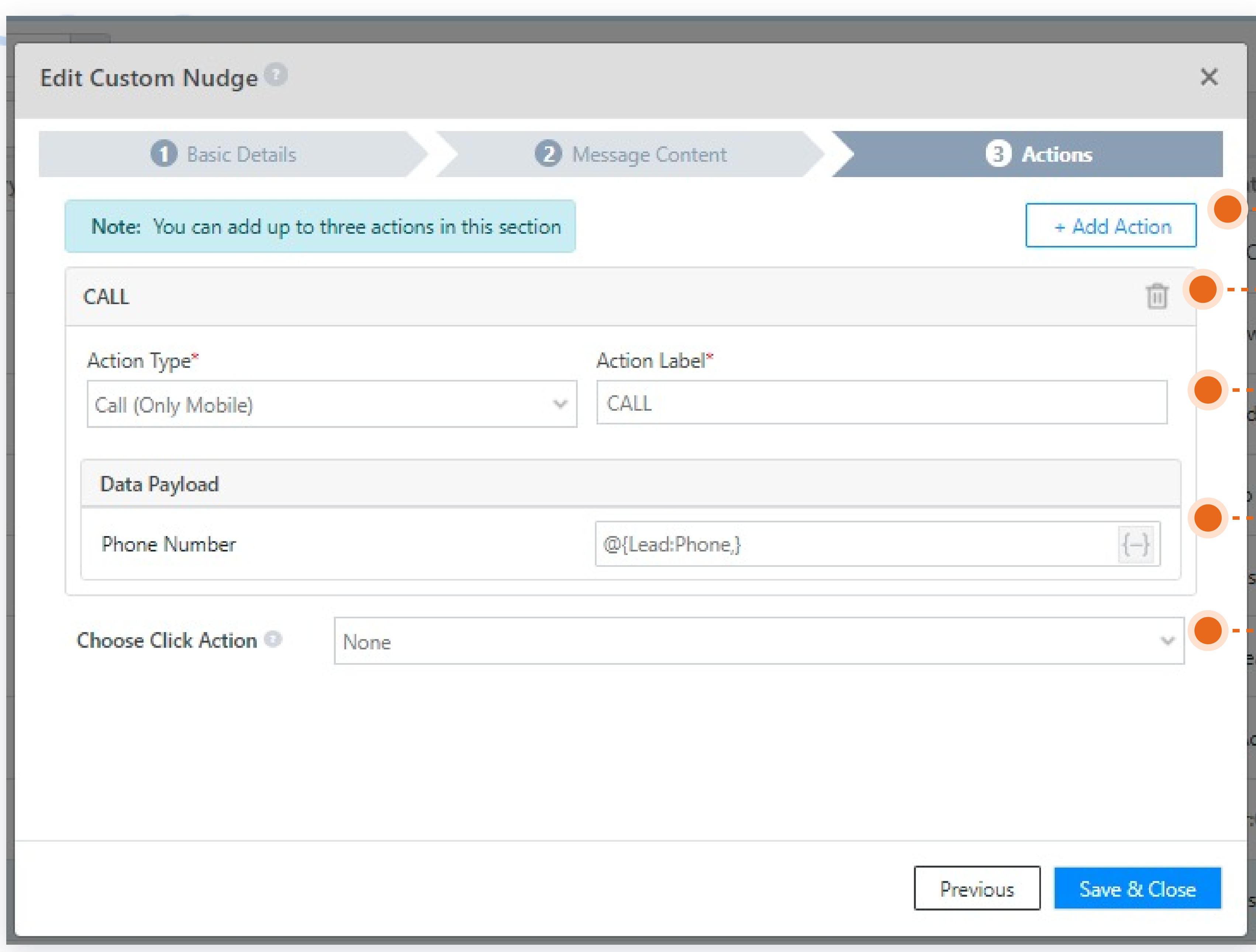
Nudges Title - Users can either type the title, or can select using the parameters

Message - Message content or notification content is the content which is used the describe the context to user. This can be custom typed or users can select parameters from the list

Attach Images - Image can't be sent for web notifications i.e Carter. Only for mobile notifications, users will receive images

Actions

The actions that your users can perform through the nudge notification. These actions will redirect your users to the selected screen within the LeadSquared. You can add up to three actions.



Add Custom Action

Remove/Delete Action

Action Type and Action Label

Data Payload

Click Action

Action Type – From the dropdown, select the actions you want your user to perform. The following Action Types are available – View Lead (Web and Mobile), View Opportunity (Web and Mobile), View Activity, View Task, Open URL (Web and Mobile), Call, Check-In, Check-Out, Add Lead, Add Activity, Add Opportunity, Add Task

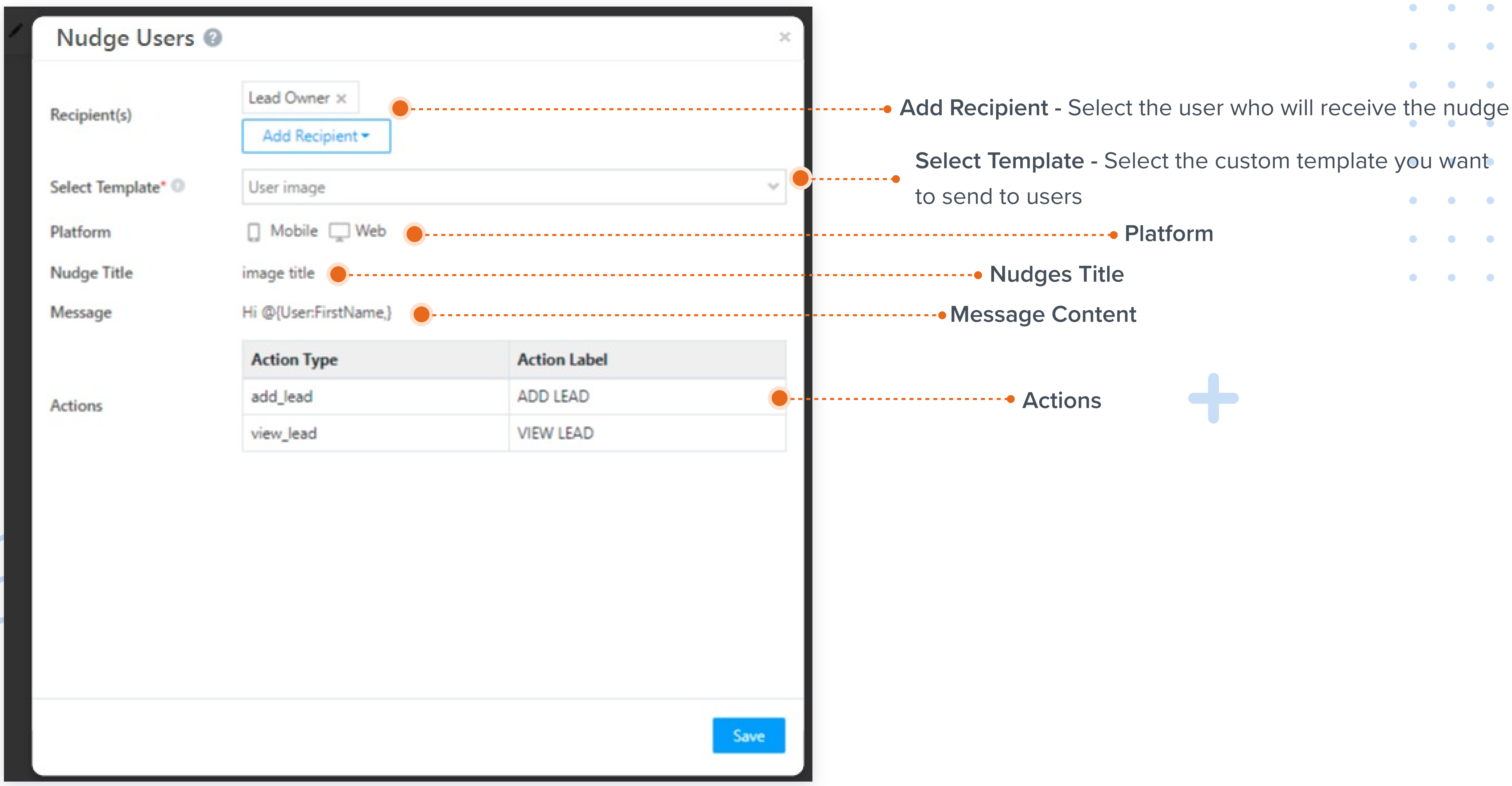
Action Label – The display name of the action.

Data Payload - For each action, we've already configured the required parameters to pass in the notification payload. You don't need to edit the payload, unless your implementation requires you to send certain parameters in place of the default ones.

Click Action - From the Actions you've selected, only one action can be set as the Click Action. clickable in the nudge notification. The click action will be performed when a user taps anywhere on the nudge notification.

Step 3.2 : Assign Template through Automations

Note: The entity (Lead, Opportunity, Activity, Task, and User) you selected as the category in your custom template should be the same entity you select as an automation trigger. For e.g., if you select Lead as the category while creating the custom template, you must create the automation using a Lead trigger.

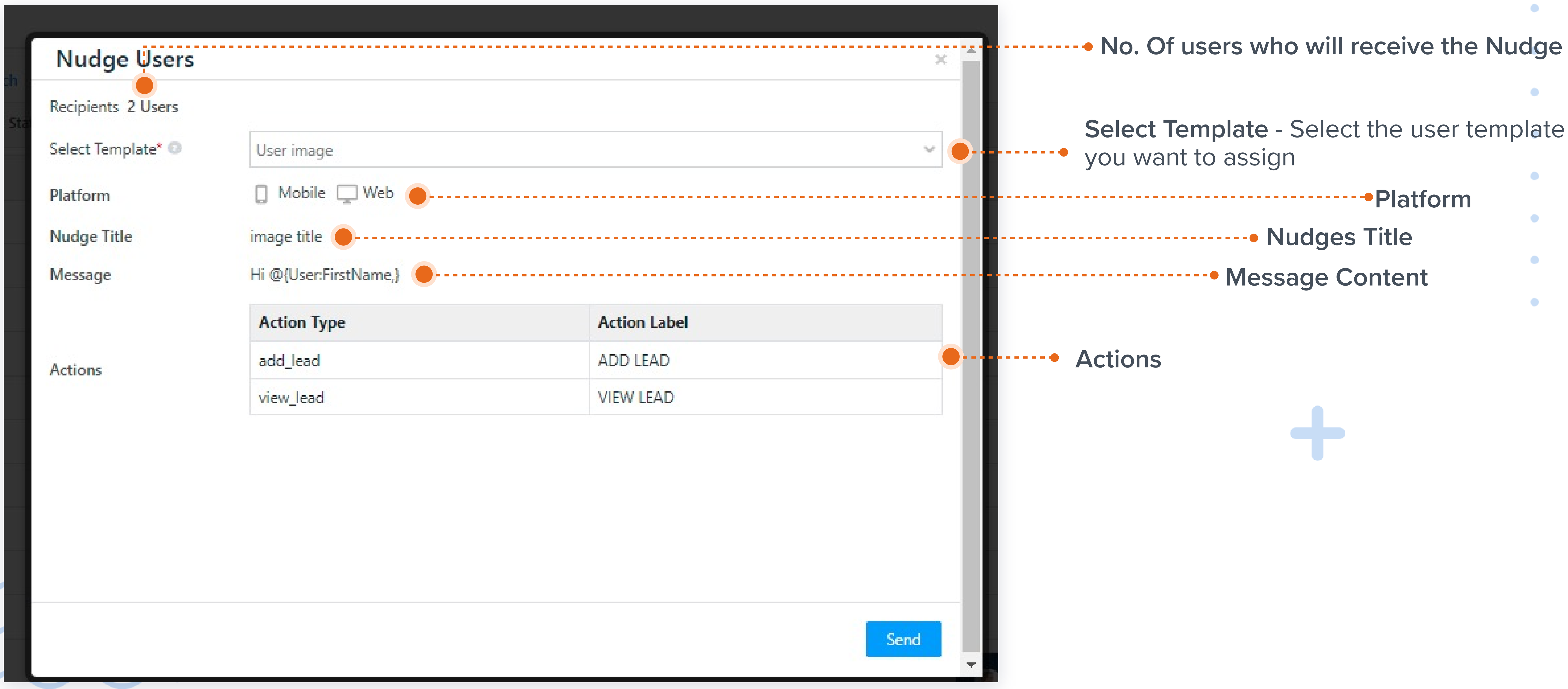


- Set up an automation, and ensure the trigger is the same as the entity used to create the template.
- Click the **Add Automation** button, click Custom, and then click **Nudge Users**.
- On the **Nudge Users** pop-up, from the **Add Recipient** dropdown, select the user who should receive the nudge. The following options are available –
  1. Lead Owner
  2. Activity Owner
  3. Opportunity Owner
  4. Task Owner
  5. Select User
  6. Object Field
- From the **Select Template** dropdown, select the custom template you want to send to your users.
- Once you're done, click **Save**, and then **Publish** the automation.

Step 3.3 : Send Nudge to Users

You can also send a single, one-time nudge to your users. This can be used for important announcements like a policy update, an upcoming event (like a holiday), a critical situation at work, etc.

> **Note:** From the User Settings page, you can only send user-based nudges, and not lead, opportunity, activity, or task based nudges.



- To send a single nudge, navigate to **User Settings.**
- Against the users you want to send the nudge to, click the checkbox.
- Then, hover your cursor over the Actions button, and click **Nudge Users**.
- On the **Nudge User** pop-up, from the **Select Template** dropdown, select the user template you want to assign.
- Once you’re done, click **Send**. Your users will receive the nudge on their mobile devices.

Frequently Asked Questions

What are the User Triggers in Automation?

Check-in, Check-out, on a particular date, Custom card is not available. Covered via Webhook. Contact App Marketplace team to set-up the same.

Can I send Images in Web Nudges?

No, its not supported as of now for Carter.

What actions are supported?

Only View Lead, View Opportunity, and Open URL is supported as action in Carter notification. If other actions are configured those won't be visible.

Can we support any other action beside mentioned earlier?

No, this requires changes on mobile app side.

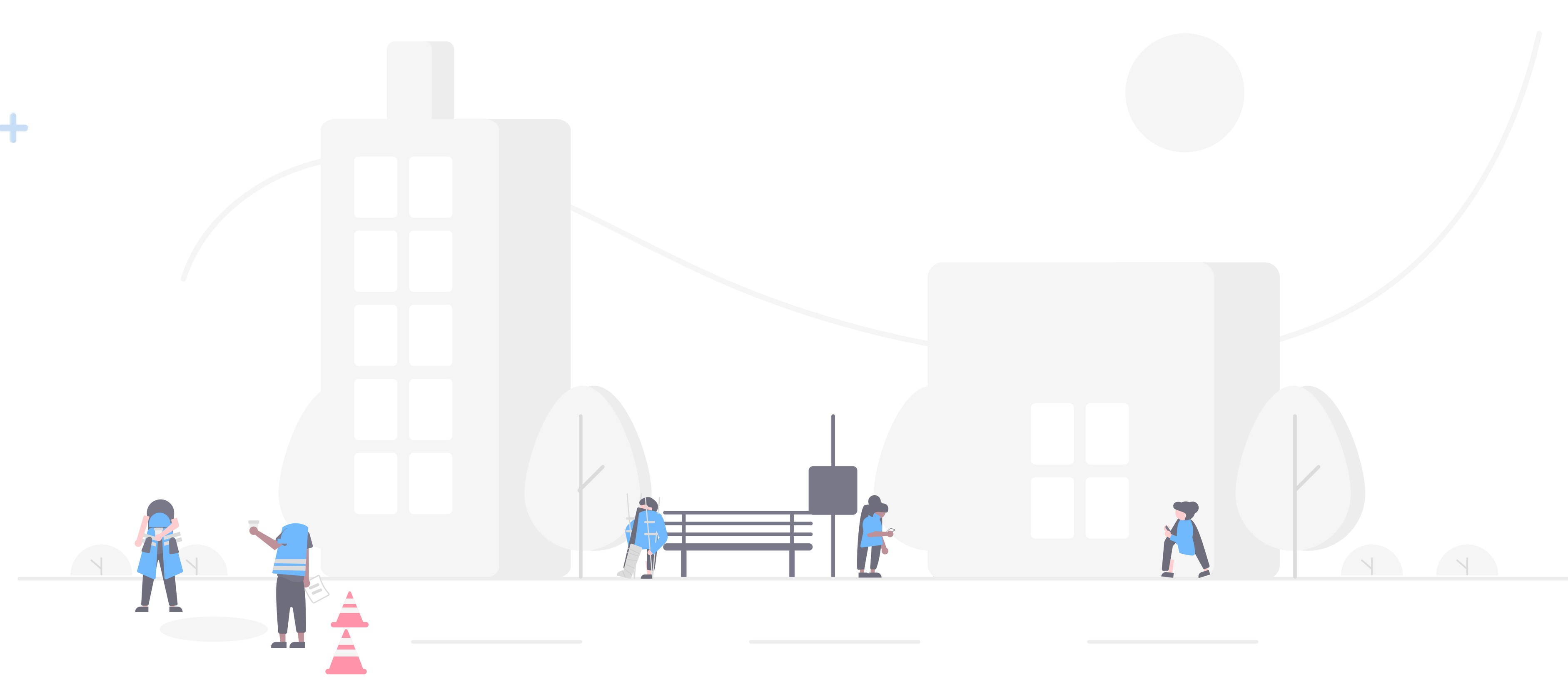
What about current Notifications connector?

Current notifications connector covers limited event notifications. If this connector is installed, new connector won't work. This will be deprecated in future.

Is this a paid connector?

This is a paid connector. Please contact sales@leadsqaured.com to get a quote.

"Nudge your sales reps for higher sales performance"



For a detailed documentation about the product, please visit : https://help.leadsquared.com/nudges-connector/

Need help? Get in touch with LeadSquared's support. Mail us at support@leadsquared.com

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