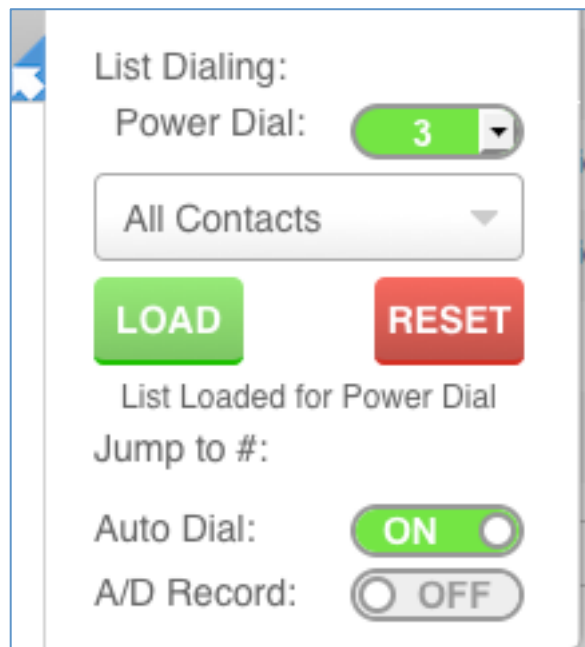


TURBO***DIAL**



List Dialing:
Power Dial:

All Contacts

LOAD **RESET**

List Loaded for Power Dial

Jump to #:

Auto Dial: ON

A/D Record: OFF

How to Use **Power Dial**

If you answer 'yes' to any of these questions...

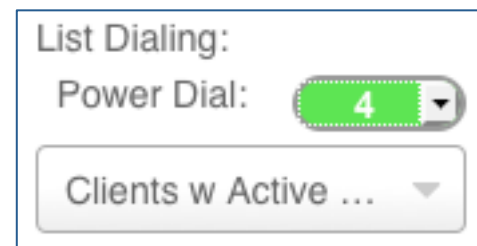
- Are you able to acquire more leads than you can pursue?
- Do you need to connect to more humans and fewer voice mail systems?
- Do you need multiple agents working the same list?

Then You Need **Power Dial:**

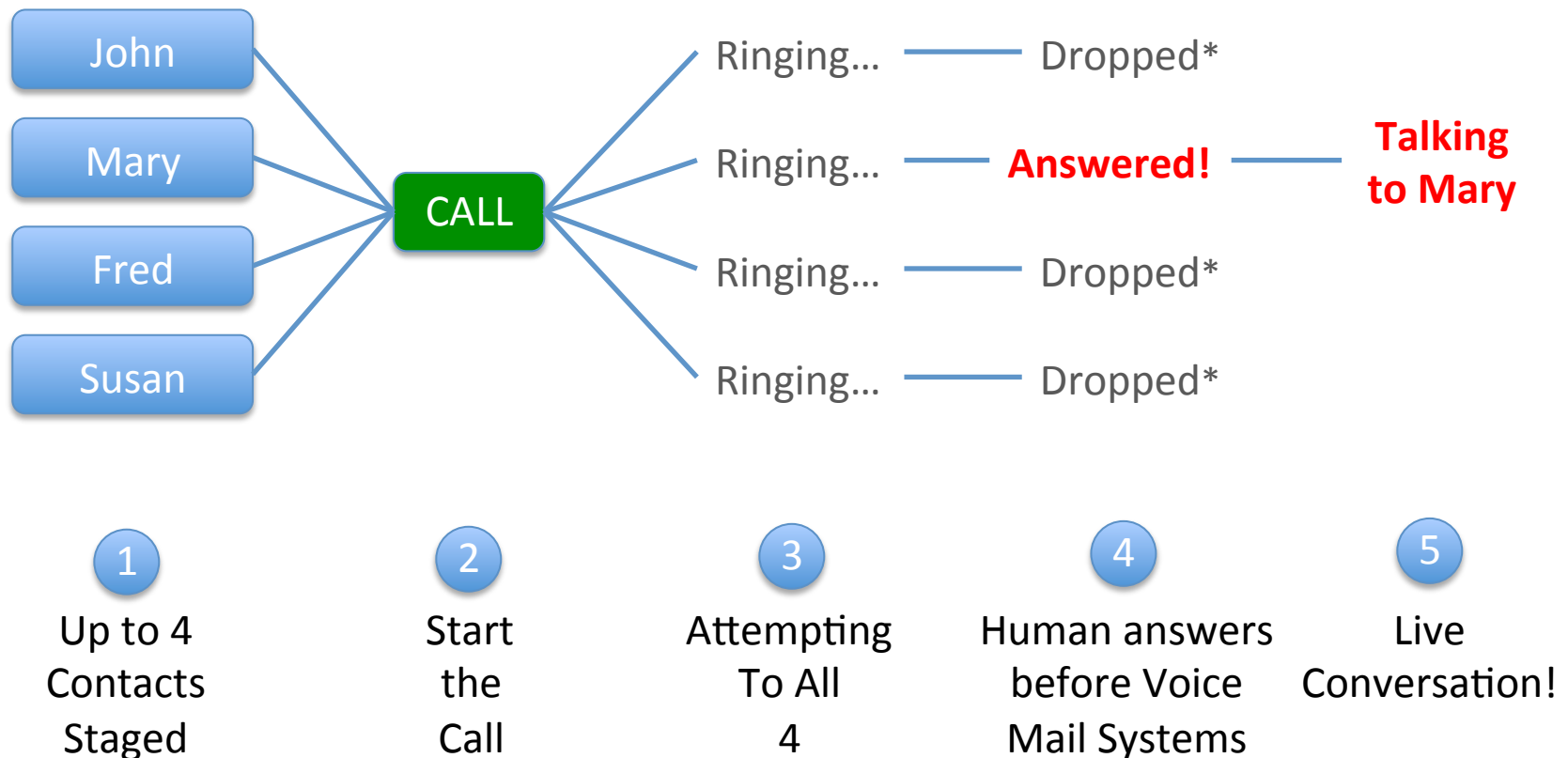
- Simultaneous Calls
- Multi-Agent List Sharing

Simultaneous Calls Explained

- Goal: Increase the number of live conversations achieved during a calling session.
- Many of your calls reach an answering system
- Leaving an effective voice message is good – but having a sales conversation is better
- Power Dial: Achieve significantly more conversations by dialing multiple contacts simultaneously and connecting only to the first to answer



Simultaneous Calls Explained



*turboDial immediately drops other calls when one call is answered

List Sharing Explained

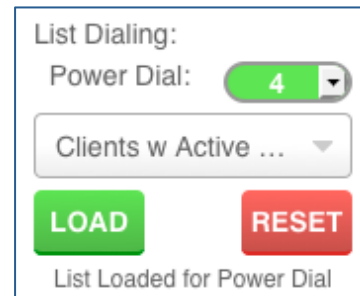
- Goal: Finish calling a List sooner by assigning multiple Agents to call it
- Standard List Dialing allows multiple Agents to share a list, but they might “collide” and call the same contact
- Power Dial:
 - The List is centrally managed by turboDial to ensure each Agent is allocated unique Contacts for every call
 - The position in the list is remembered between sessions, and only forgotten when the list is “Reset” or expires after several hours of non-use

Requirements for Power Dial

- turboDial Sales Pro with the Power Dial upgrade
 - Login at <https://sd123.customerhub.net> to upgrade

- To activate:

1. Select Power Dial 1-4
2. Load a List



- Contact or Opportunity Saved Search lists are OK
- Your Saved Search list must include the Contact ID, Name and Phone1
 - Only the 'Contact ID' is required for List Dialing without Power Dial

Steps of the Power Dial Call

1. Activate Power Dial by choosing the number of simultaneous calls
2. Choose and Load a Saved Search
 - Notice the message indicating if you are the only User in this list
 - Choose “Reset” if you want to purge the list and re-Load it to start fresh
3. The Power Dial curtain lowers and displays the Contacts who will be dialed
4. Click the “Call” button to begin
5. When a Contact answers:
 - An alert displays the name of the Contact who answered
 - The Power Dial curtain raises to reveal the Contact info
6. After the Call is over:
 - Not Auto-Dialing: Click the right-nav button to retrieve the next contact group – then click “Call”
 - Auto-Dialing: Save a Note and/or Call Outcome, the list will automatically advance and the next Call will begin

Power Dial curtain is displayed before dialing

Optionally de-select any contact before clicking "Call"

Manually move ahead in the list

Upon Answer an Alert appears so you know which Contact it is

The screenshot shows the turboDial web interface. At the top, the browser address bar displays 'https://turbodial.biz/ff/index1.php' and the user is logged in as 'bill@web-lever.com'. The main interface is divided into several sections:

- Power Dialing List:** A list of contacts with checkboxes. Contact 5 'Edward Franks' and contact 7 'Gary Henderson' are selected. Contact 6 'Fiona Gayle' is not selected. A red arrow points to the checkboxes with the text 'Optionally de-select any contact before clicking "Call"'. A blue arrow points to the right side of the list with the text 'Manually move ahead in the list'.
- Call Controls:** Buttons for 'CALL', 'SMS', and 'Msg'. A 'Search or Number' input field is also present.
- Caller ID:** A dropdown menu showing '+16129992889'.
- Calling Device:** A dropdown menu showing 'This PC'.
- Inbound & SMS:** A dropdown menu showing 'sd123:161299...'. A red arrow points to this section with the text 'Notice how many Agents are sharing the List'.
- Recorded Msg:** A dropdown menu showing 'PMI Message 1'.
- List Dialing:** A 'Power Dial' dropdown menu showing '3'. A 'LOAD' button is visible with the text '1 Calls made since last Load'. Below it, it says 'List Loaded for Power Dial' and 'Jump to #:'.
- Auto Dial:** A toggle switch set to 'ON'.
- A/D Record:** A toggle switch set to 'OFF'.
- Call Outcomes:** A section with 'Apply Tag (200)' and 'Remove Tag (10)' dropdowns, a 'Call notes...' text area, and a 'Call Outcome' dropdown. A 'Save Tags, Notes, & Outcome for Hank landolo' button is at the bottom right of this section.

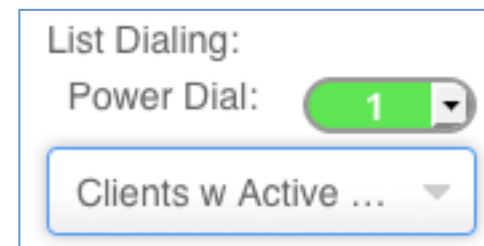
Notice how many Agents are sharing the List

Steps to begin:

1. Choose 1-4
2. Choose a List
3. Click "Load"
4. Click "Call"

Choose “1” Simultaneous Call?

Q: Why would you ever use Power Dial and choose only “1”, which turns off Simultaneous Calls?



A: For any of these reasons:

- You want to share the list with multiple agents without colliding
- You want turboDial to remember your position in the list between calling sessions
- You need either a conversation or a voice message left for every Contact in the list
 - A setting of “1” is the only way to leave a Call Outcome for every Contact

Power Dial – Items to Note

- Call Notes
- Lists Sharing
- List Size Limit
- International Dialing

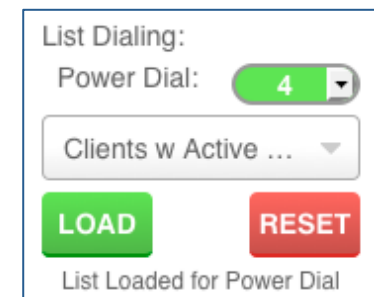
Call Notes

- For the Contact who connects:
 - A standard turboDial Call Note is left on their Contact Record
 - Manual Call Notes and Call Outcome Automation are available
- For Contacts who were dialed but did not connect:
 - If their phone began ringing:
 - a “turboDial: Power Dial Attempt” note is left on their Contact Record
 - If their phone did not begin ringing:
 - no note is left
 - Manual Call Notes and Call Outcome automation are not available

Item to Note

Sharing a List

- Power Dial maintains a single copy of a List between all Users
 - Allocates a group of 1-4 Contacts each time a User is ready to dial
 - Ensures no collisions – all Users dial different Contacts
- List Load & Reset
 - The first User to Load a list causes that list to be retrieved from Infusionsoft
 - Subsequent Users who Load the same list will share the common list without colliding
 - When the end of a list is reached
 - Contacts who “answered” are deleted from the loaded list
 - The list starts over at the beginning
 - When a List is “Reset”
 - It is purged from turboDial for all Users
 - The next Load of the list causes it to be retrieved from Infusionsoft again
 - Position in the list is reset to 1
- List Expiration
 - turboDial will auto-Reset a list after several hours of non-use



Loaded List Limit

- Infusionsoft limits a list load to 1000 contacts
- Situation
 - Your saved search list is larger than 1000 contacts in Infusionsoft
 - You have several agents Power Dialing to the list
- Problem
 - Your agents can call attempt to all 1000 contacts. But contacts beyond the 1000 limit will not be called even if you “Reset” the list in turboDial
- Solutions
 - Redefine your list filters to break it into multiple smaller lists
 - Use Call Outcome Automation to adjust tags to remove contacts from the list when you connect to them or their voicemail. That allows a list “Reset” to bring in more contacts.

International Dialing

- Power Dial uses the account owner's country code for dialing
- If your Saved Search list includes Contacts in other countries the Phone number must be configured in International dialing format:
 - e.g. +61412345678 for a mobile number in Australia

TURBO*ODIAL

List Dialing:
Power Dial:
All Contacts
LOAD **RESET**
List Loaded for Power Dial
Jump to #:
Auto Dial: ON
A/D Record: OFF

Power Dial

- Simultaneous Calls
- List Sharing