

USER GUIDE

EverReady Highlights, step by step

Highlights adds three things to your Salesforce: a Heatmap of your portfolio, a Power Map on every account and every opportunity, and Contact Finder to fill the gaps. This guide covers each view in the order you use it.

[01 Heatmap](#)[02 Power Map](#)[03 Contact Finder](#)

BEFORE YOU START

Our key concepts

Anne Martin CFO

+33 6 39 98 40 12

Director

Finance

Auto Contact Segmentation

EverReady reads the job title of every contact and places them by job family and by hierarchy level.

53

Emails 35

Calls 8

Meetings 10

Activity Intensity

EverReady counts the calls, emails and meetings exchanged with the contacts in your Salesforce.

● 60% and up

● 30 to 60%

● below 30%

● no interaction

Engagement Rate

EverReady measures the share of incoming interactions in the total. It tells you who answers you and who does not.

Read the colour together with the volume.

A green engagement rate only means something when the number of activities is high: one exchange answered once shows as 100%, and tells you nothing about the relationship.

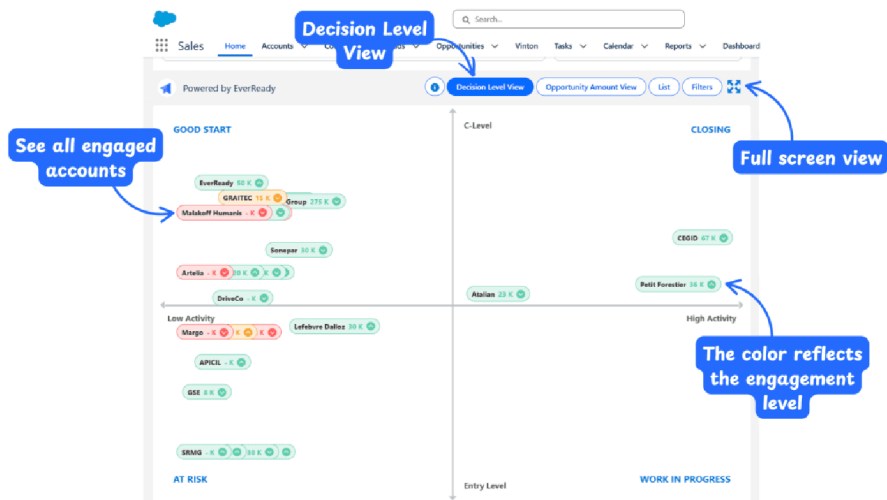
PART 1 OF 3

Heatmap

Your whole portfolio on one screen

The Heatmap places all your accounts automatically: by level of activity, by the seniority of the people you talk to, and by the amount of the open opportunity. At a glance, you see the deals that are ready to sign and the ones at risk.

Lives on your Salesforce Home page



Filter your view first

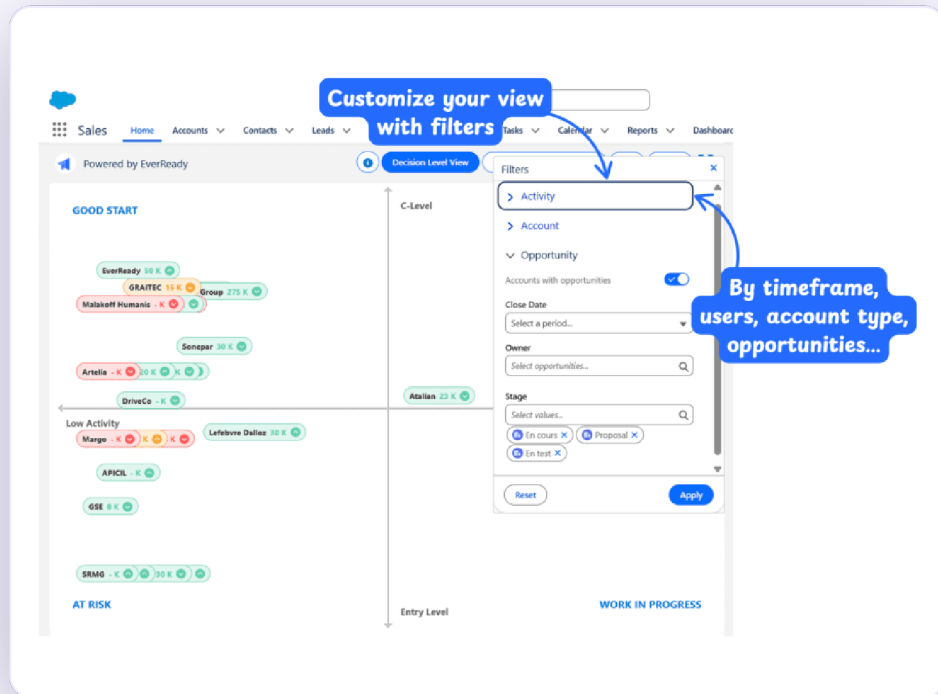
The Heatmap opens on the last 30 days of your own activity.

FILTERS AVAILABLE

- Activity period: 7 days, 30 days, 3 months...
- Account criteria: type, industry...
- Opportunity criteria: close date, owner, stage

FILTERS VIEWS EXAMPLES

- Your own scope
- One quarter, one stage, one team, one rep
- The same scope every week



Best practices

Compare companies with the same profile and the same sales cycle length. A transactional business and a long cycle business never generate the same volume of interactions.

Decision Level View

Activity on the horizontal axis, seniority of the contacts you reach on the vertical axis.

WHO IT IS FOR

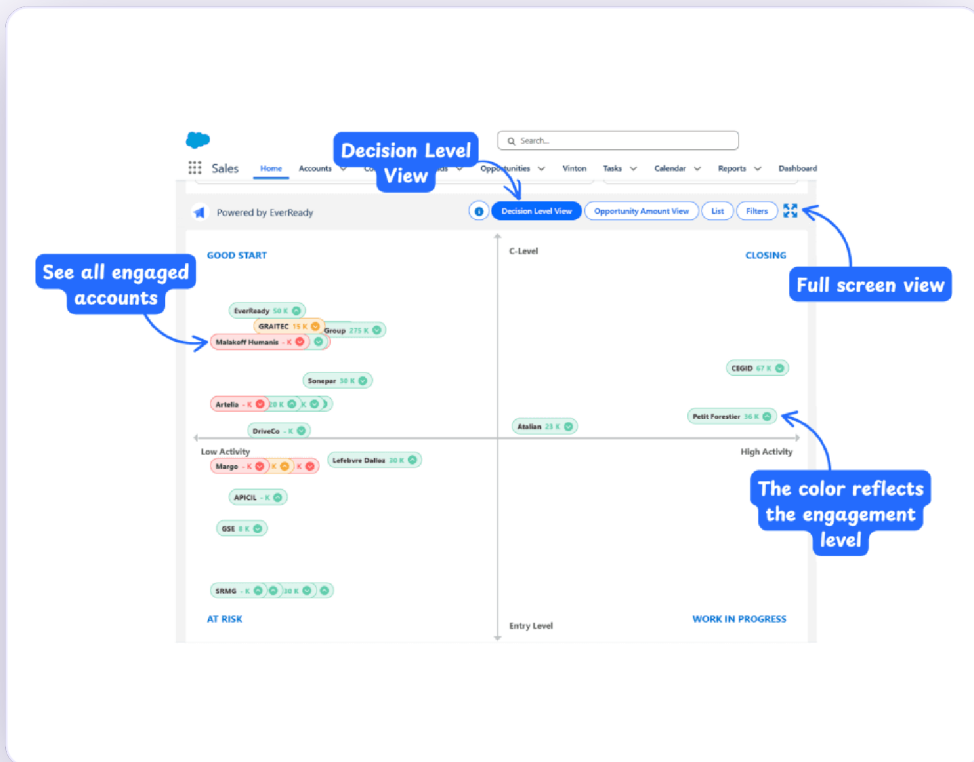
- Sales leaders running a weekly review
- KAMs with a portfolio to prioritise

WHAT IT SHOWS

- One pill per account
- Colour: engagement level
- Figure: open opportunity amount
- Four corners: Good start, Closing, Work in progress, At risk

WHEN TO USE IT

- Whenever you have a forecast to build
- Weekly pipeline review
- Before a one to one with a rep



How to use it

Top left

GOOD START

You are talking to decision makers, but activity stays low.

Best action: Apply a top-down strategy: target operational sponsors now to move your sales cycle forward.

Check where your team spends its time: on which accounts, and at which level. Then work corner by corner.

Top right

CLOSING

Decision makers involved and sustained activity: you are in the closing phase.

Best action: You have the momentum: identify the last blockers to clear to get the signature.

Bottom left

AT RISK

Low activity, operational contacts.

Best action: Find new key contacts (sponsors or decision makers) to start the sales cycle. Otherwise, take the account out of the forecast.

Bottom right

WORK IN PROGRESS

Sustained activity and operational contacts (normal on a customer).

Best action: On a prospect, it is time to meet the decision makers. Ask your contact to set up a meeting with their management. Otherwise, bypass them.

Opportunity Amount View

Same accounts, but the vertical axis becomes the amount of the open opportunity.

WHO IT IS FOR

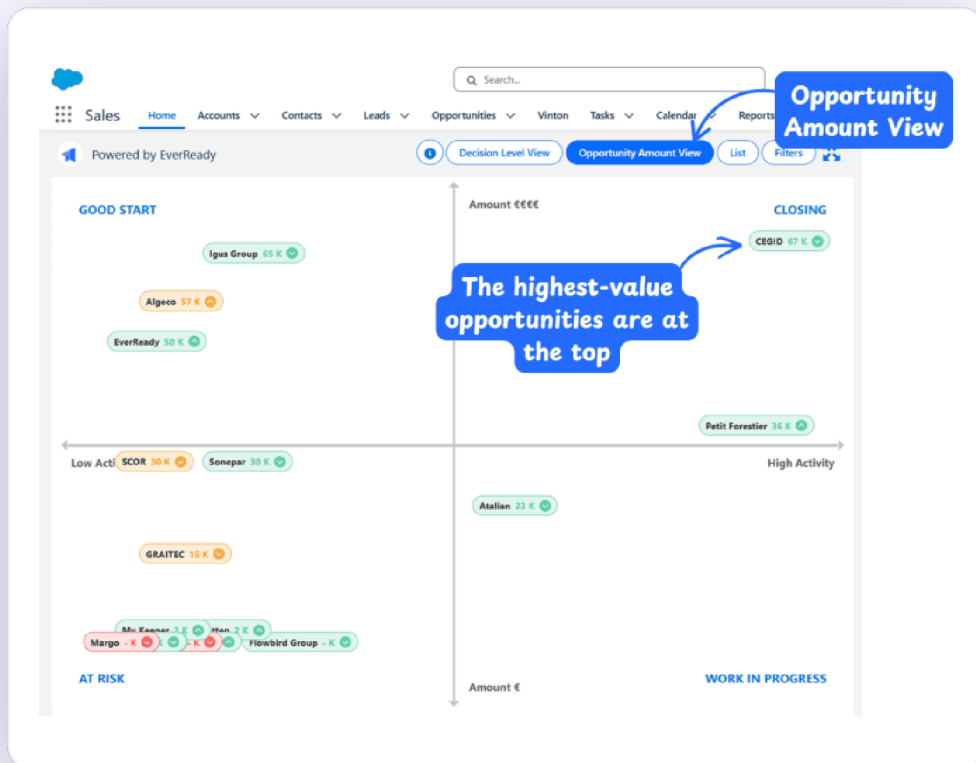
- Anyone prioritising by revenue
- Forecast owners

WHAT IT SHOWS

- Biggest deals at the top
- On the left: value with almost no activity
- Same engagement colours

WHEN TO USE IT

- Forecast calls
- End of quarter
- When you have more deals than hours



How to use it

Check that your selling time goes to the right opportunities. Read it before every forecast call.

Top left

GOOD START

High amount, low activity.

Best action: Focus your effort on these accounts. Follow up with your contacts and find new ones to move the deal forward.

Top right

CLOSING

High amount, high activity.

Best action: Confirm the decision process: who decides, who buys and what the next steps are.

Bottom left

AT RISK

Low amount, low activity.

Best action: Stop investing time unless the account has real growth potential.

Bottom right

WORK IN PROGRESS

Low amount, high activity.

Best action: Check that you are talking to the right people and identify what is still blocking the signature.

Account details

The last step of the Heatmap: a quick summary of one account, read from the map.

WHO IT IS FOR

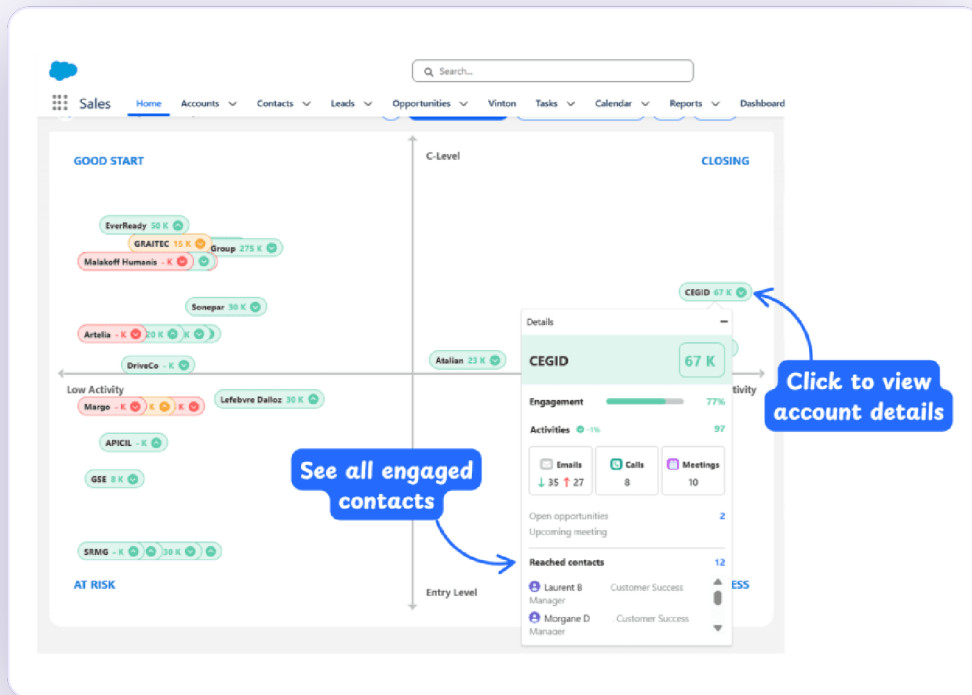
- Reps preparing a call
- Managers checking coverage

WHAT IT SHOWS

- Engagement score
- Emails, calls, meetings
- Open opportunities and next meeting
- Contacts actually reached

WHEN TO USE IT

- Before a QBR or a weekly meeting, for a first look at the pipe
- To check if engagement is one thread or a real committee



How to use it

Before a pipeline meeting, it saves you opening every record: one click on a pill gives a quick view of the deal activity, the last exchange, who is engaged and the open amount.

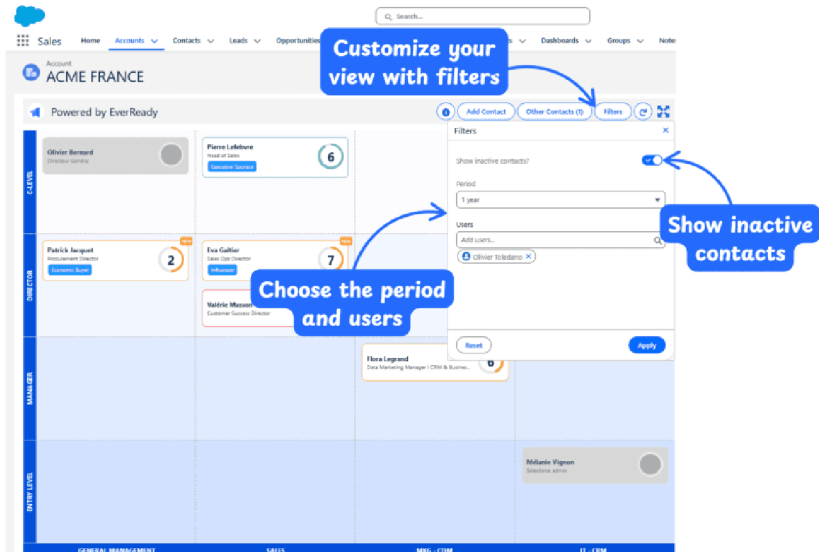
PART 2 OF 3

Power Map

Every stakeholder, placed for you

EverReady Highlights builds a Power Map on your accounts and on your opportunities. Each contact is placed automatically by seniority and department, and coloured by engagement. The gaps in your coverage show up as empty cells.

Lives on the Highlights tab of any Account or Opportunity



Filter your map first

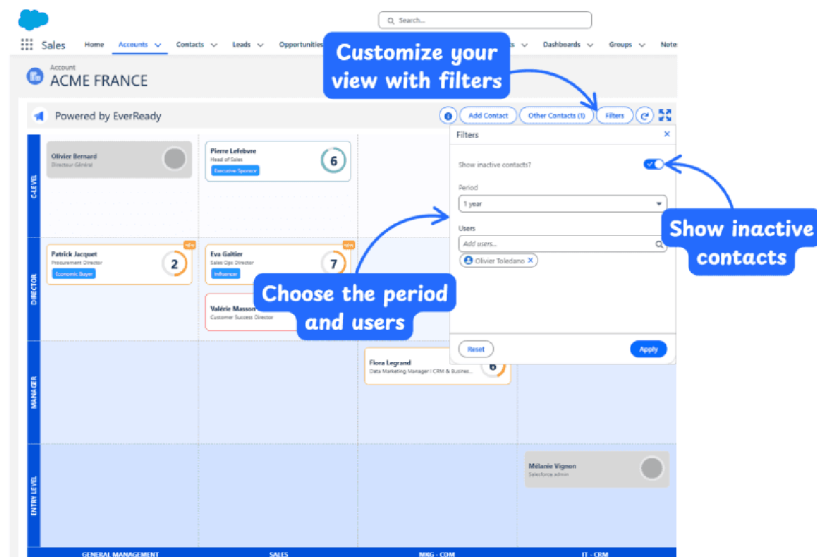
The Power Map opens on the last 3 months of activity.

FILTERS AVAILABLE

- Period: 7 days, 30 days, 3 months...
- User: one or more
- Inactive contacts, on or off

FILTERS VIEWS EXAMPLES

- The current quarter
- One colleague's coverage
- The contacts who went quiet



Best practices

Stuck on an account? Show the inactive contacts: an old contact can be a way back in.

How to read the Power Map

One click from any account or opportunity, and every contact is placed for you.

WHO IT IS FOR

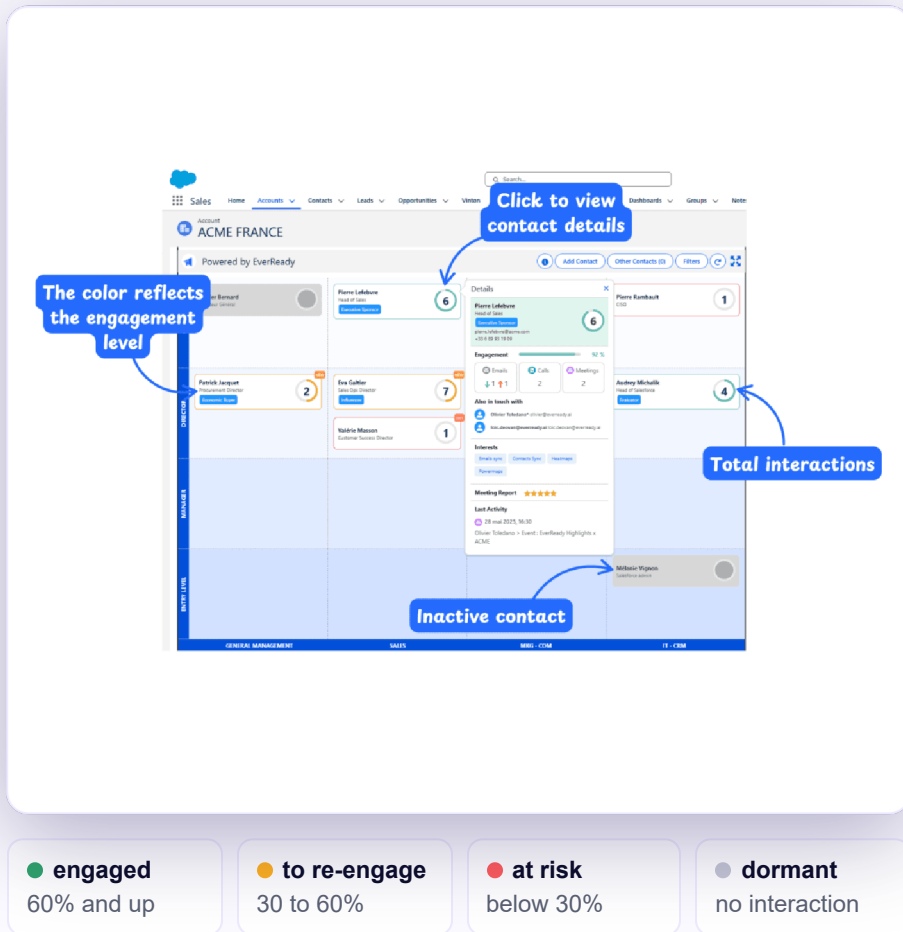
- Everyone working a named account
- AEs working a live opportunity
- KAMs on multi contact deals

WHAT IT SHOWS

- Rows: hierarchy levels
- Columns: job families
- Ring: number of interactions
- Badge: buying role (Decision Maker, Sponsor, Influencer...)
- Click a card: engagement, interactions, colleagues in touch, last activity

WHEN TO USE IT

- Opening an account you have not touched for weeks
- Preparing an opportunity review
- Before an email, a call or a request for an introduction
- First slide of an account review or a QBR



How to use it

What you look for depends on the situation.

1

Account plan

See who you cover, who you are missing, and where the relationship is weak.

2

Before a one to one

Review the deal, name what works in your favour and the risks, and agree on the strategy.

3

Prospect new contacts

Check that you talk to decision makers, then use Contact Finder to fill the empty cells.

4

Define a sales strategy

Decide who to engage next, at which level, and which colleague can open the door.

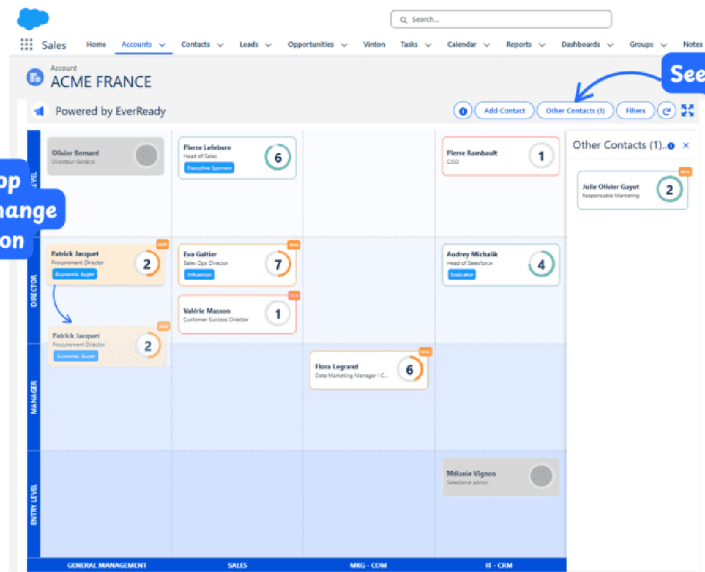
07 POWER MAP

Complete the map

Drag the contacts left in Other Contacts into the right cell, and the map shows the real coverage.

Drag & drop
contacts to change
their position

See all unmapped
contacts



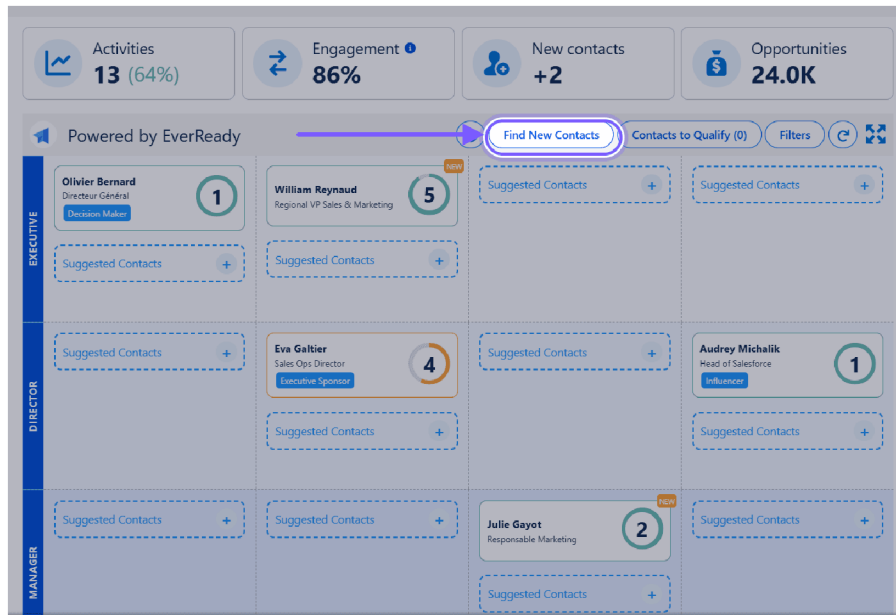
PART 3 OF 3

Contact Finder

Fill the gaps in the committee

The Power Map shows who you know. Contact Finder proposes who you are missing, and gives you their email, LinkedIn profile and mobile number in one click.

Lives in the Power Map toolbar and in its empty cells



Find New Contacts

Find the contacts you are missing, and get their email, LinkedIn profile and mobile number in one click.

WHO IT IS FOR

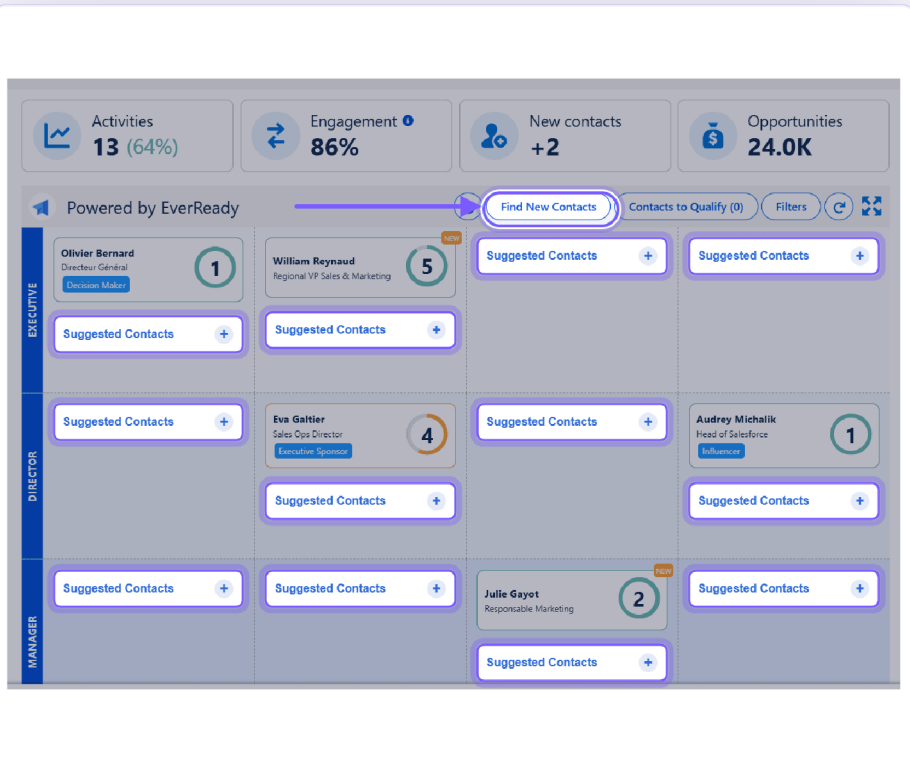
- Account executives, SDRs and KAMs with a committee to widen
- Anyone whose map still has empty cells

WHAT IT SHOWS

- An empty cell that suggests hand-picked contacts
- A Find New Contacts button that opens an advanced search filter

WHEN TO USE IT

- A level or a department is empty
- A champion leaves the company
- Before a prospecting block

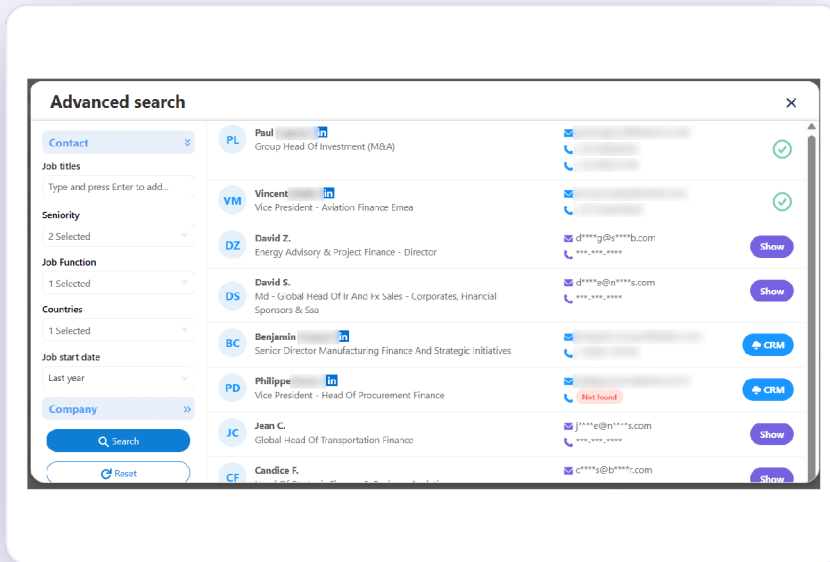


How to use it

- 1 Click an empty cell: EverReady recommends contacts to target, at the same hierarchy level and in the same job family.
- 2 Click Show to get the email, the LinkedIn profile and the mobile number.
- 3 Click CRM to create the contact in Salesforce.
- 4 A green tick marks a contact already in Salesforce.
- 5 For an advanced search, click Find New Contacts at the top of the Power Map and filter by job title, seniority and function.

Best practice

Reach out before you import the record into Salesforce. Your CRM then stays aligned with the contacts you work.



KEY TAKEAWAYS

Three habits that make it pay off



Start from the map

Open the Heatmap before your pipeline report. It shows the activity that happened, not what was logged.



Read the empty cells

On a Power Map, the empty cells are the risk. An empty executive row means no sponsor.



Keep one shared view

Use the same filters across the team, so every review compares the same scope.



Get the most out of Highlights

Our team is here to help you read your activity, map your accounts and close more deals with EverReady Highlights. Reach out any time.

Contact us

contact@everready.ai