Implementing Roles & Permissions

A SalesLoft workbook brought to you by SalesLoft U

Governing feature accessibility is important to modern sales teams like yours.

At SalesLoft, we understand you need flexibility to create permissions based on role. That's we released Roles & Permissions. It has functionality robust enough for enterprise teams with an implementation simple enough for anyone to use.

With Roles & Permissions, admins have the ability to create, customize and assign roles and permissions to various parts of the app.

Overview of Roles & Permissions

- A **role** is a SalesLoft profile that defines the functionality available to a user assigned that role
- A **permission** grants access to specific SalesLoft features

Understanding Permissions

Permissions determine whether a role has access to a SalesLoft feature or functionality. To provide a robust experience that suits the needs of your sales team, SalesLoft has a number of permissions categorized into fifteen sets. A role can have one, some or all of the permissions within a permission set.

The permission sets are:

- People
- Templates
- Automation Rules
- Company Management
- Roles & Permissions
- Live Calls
- Team Management
- Analytics
- Dialer
- Payments
- Single Sign-On
- Dispositions & Sentiments
- Cadences
- Snippets
- Salesforce

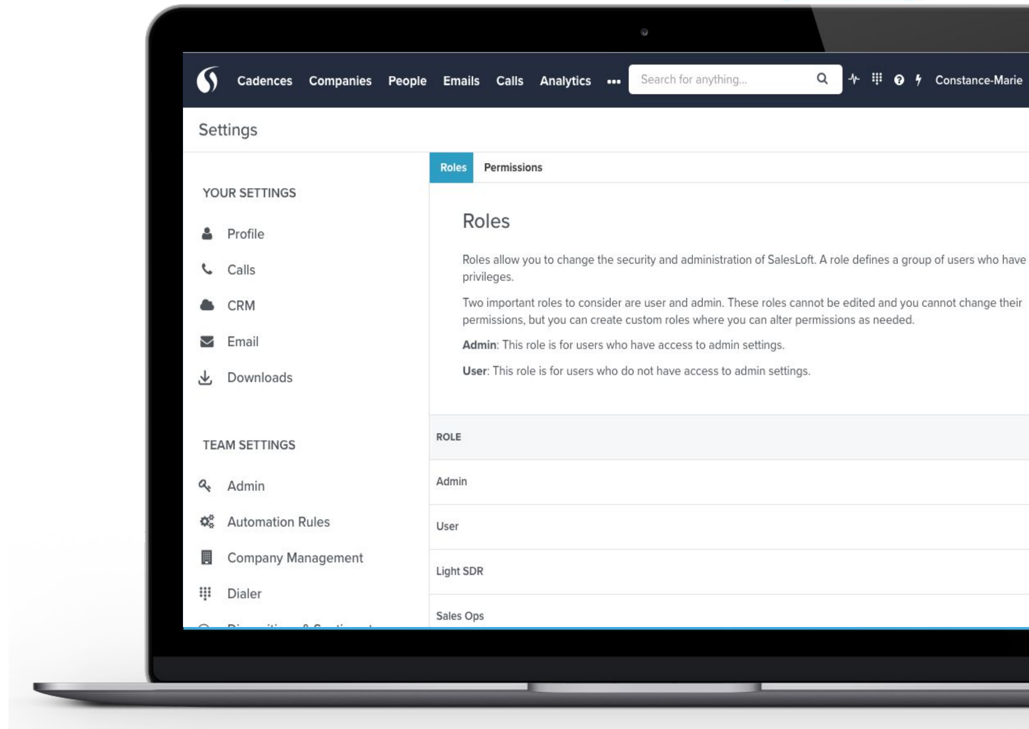
Identifying the Roles You'll Need

Each sales team has unique role needs based on the size, structure and goals of the team. You can start identifying the roles you'll need in SalesLoft by answering the following questions:

1. **What unique roles exist on my team and need SalesLoft access?** For example, your SDRs, AEs, sales managers and revenue ops specialist may all have a SalesLoft account.
2. **What are the objectives of each SalesLoft user on my team?** While SDRs and AEs are focused on hyperpersonal engagement, a Sales Enablement Specialist is focused on your Salesforce configuration.
3. **What safeguards do I need in place?** Maybe you don't want green SDRs creating their own cadences or team leads affecting time-wide automation rules.

Answering these three, simple questions will uncover the roles you need and what permissions they should have.

Creating & Editing SalesLoft Roles



Creating and editing roles in SalesLoft is simple. Start by heading to your Team Settings and selecting Roles & Permissions.

- **To create a new role**, select "Add Role"
- **To edit an existing role**, select the pencil edit icon next to the role

When creating a new role, you'll be asked to copy an existing role. Select a role with permission sets closest to the ones needed by your new role. Then, edit the role to modify the permission sets. Simply check or uncheck the boxes for the features the role needs access to. SalesLoft will alert you that the role has saved automatically. And that's it!

Tip: Some permissions require one another. When you enable one permission that is dependent on another, the other feature will automatically be enabled.

Common Roles & Permission Sets

Not sure the roles you'll need? In the next section, we'll share the roles and permission sets commonly used by other successful SalesLoft users. The roles covered are:

- **Junior SDR**
- **Senior SDR**
- **Account Executive**
- **Team Lead/Manager**
- **Sales Director/VP of Sales**
- **Sales Ops/Sales Enablement**
- **Content Marketing**
- **Billing/Finance**

Reminder: "Admin" and "User" roles are standard to each SalesLoft account.

Role: Junior Sales Development Rep

A junior SDR is hyper-focused on ramping up and building momentum towards making 100% quota. They need the ability to copy the high performing templates, snippets and cadences used by their more seasoned colleagues, without the distraction of having the ability to create their own content. Junior SDRs are also likely not importing their own prospects and don't need any admin settings.

Permissions Enabled

People
- Manage People
- Toggle DNC

Templates
- View Team Templates

Analytics
- View Analytics

Cadences
- View & Copy Public Templates
- View Team Cadences Overview
- Run Team Cadences

Snippets
- View Others' Personal Snippets
- View Team Snippets

Role: Senior Sales Development Rep

A senior SDR has been in their role for a while and they're looking to continue to crush quota and perhaps take on more responsibility in preparation for a team lead or AE role. Senior SDRs are likely sourcing their own leads and testing new messaging. They'll need all of the capabilities as a junior SDR, plus the ability to create their own content and import and manage prospects.

Permissions Enabled

All Junior SDR role permissions, and:

People

- CSV Import
- Salesforce Import

Cadences

- Manage Personal Cadences

Role: Account Executive

Senior Account Executives are focused on fostering deep relationships with their customers and need the ability to create hyper-personalized content. They may also be sourcing and importing their own leads. Because they're more seasoned than their peers, senior AEs are often trusted to create content that can be used by the entire time.

Permissions Enabled

All Junior SDR role permissions, and:

People

- CSV Import
- Salesforce Import

Cadences

- Manage Personal Cadences
- Manage Team Cadences

Snippets

- Manage Team Snippets

Role: Team Lead/Sales Manager

Team leads and sales managers need to help their members get up and running, manage content, keep an eye on analytics and provide live coaching. They'll need all of the content creation capability, with added ability to manage team wide content. They'll need the ability to control some team management, but probably won't need to access Salesforce configuration.

Permissions Enabled

All Senior Account Executive permissions, and:

- All "People" Permissions
- All "Templates" Permissions
- All "Live Calls" Permissions
- All "Team Management" Permissions
- All "Analytics" Permissions
- All "Dialer" Permissions
- All "Cadences" Permissions
- All "Snippets" Permissions

Role: Sales Director/VP of Sales

Directors and VPs of Sales are accountable for the success of the entire sales organization, so they of course prioritize results. Directors and VPs typically don't need the distraction of core functionality. Instead, they'll want to have access to team management, coaching features and of course, analytics. Directors and VPs may also manage billing, and may want the ability to edit the Salesforce configuration.

Permissions Enabled

- All "Live Calls" Permissions
- All "Team Management" Permissions
- All "Analytics" Permissions
- All "Payments" Permissions
- All "Dispositions & Sentiments" Permissions
- All "Salesforce" Permissions

Role: Sales Operations

Your sales operations team ensures that SalesLoft is configured correctly and properly integrated into your larger sales strategy tools stack. Sales Ops is typically responsible for managing Salesforce and other data-collecting options, like custom sentiment and dispositions. Your Sales Operations team may also be responsible for guaranteeing security of sales data. You probably want them to have the ability to import and export, but they likely won't need to create any content.

Permissions Enabled

Begin with the "Admin" role, and:

- Remove all "Templates" permissions
- Remove all "Live Calls" permissions
- Remove all "Payments" permissions
- Remove all "Cadences" permissions
- Remove all "Snippets" permissions

Role: Marketing

Modern sales teams collaborate and align with their marketing team during every step of their sales process. Marketing is a really powerful ally in the creation of content to be used throughout sales engagement. Content and other marketing professionals will need the ability to create content for the entire team. Inbound team managed by marketing will also need to import and edit prospects.

Permissions Enabled

- All “Templates” Permissions
- All “Cadences” Permissions
- All “Snippets” Permissions
- All “People” Permissions
- All “Analytics” Permissions

Role: Billing/Finance

While SalesLoft has great features to enable and empower sales teams, your billing team isn't interested in the bells and whistles: they just want to keep the lights on! In this role, they'll just need the ability to manage credit cards and payment types, download invoices and receipts and reload dialer credits.

Permissions Enabled

- All "Payment" Permissions

Helpful Tips

- SalesLoft innovates quickly! Remember to update your custom roles as new permission sets are released.
- Roles and permissions are completely flexible. Make adjustments to your configuration often to meet the growing demands of your team.

Learn more about how to make the most of SalesLoft at

learn.salesloft.com

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