Chorus Implementation Guide

For administrators implementing Chorus by ZoomInfo

Chorus helps performance-driven sales teams capture and analyze all customer calls, meetings, and emails to create visibility, drive process and behavior changes, and deliver bottom line impact. It surfaces deep insights about deal participants and buying committees, and triggers automated campaigns via keyword mentions. You can scale these plays to strengthen your entire go-to-market engine using any number of the key features in the list below.

- **Scorecards** help you deliver effective coaching programs for your reps, reducing ramp time in onboarding and reinforcing best practices through continued enablement.
- **Playlists** provide an easy way to curate content for team training within your organization and save a collection of snippets in one place.
- **Trackers** help you gather insights into how your team talks about the topics that matter the most, such as new features, playbook talk tracks, competitor mentions, and risk.
- The **Deals** page gives you key insights into the progression of deals across your team. Get a pipeline-level view of activity, engagement, and risks associated with open opportunities.
- **Analytics** help every rep and every team to understand what they are doing well, where they need to improve, and what skills from their peers they can replicate for success.

Implementation Overview

As a Chorus admin, you'll set up the user experience for your organization.

- Configure teams, roles and hierarchies that reflect your organization.
- Configure Chorus with Calendar/Email Admin Settings (Google or Microsoft) to simplify user onboarding.
- Add other admins and users and manage them over time.
- Configure organization-wide settings and supported integrations.
- Create trackers to gather insights at scale across all of your customer interactions.

Organizing Admins and Users

Once logged in, the initial designated admin can begin setting up the organization's users (and other admins as necessary) using role-based permissions. The admin can then organize users in hierarchies and teams.

Key Concepts

Chorus users can be grouped into hierarchical teams and have certain behaviors and permissions based on their assigned role. For example, each user has:

- A Role
- A License Type (Recorder or Listener)

- A Team association

User Organization Strategies

You can organize your users in a way that reflects your organization's structure and desired permissions. The Chorus UI is flexible in helping you accomplish this:

- Larger organizations with a more hierarchical structure of user types may want to use a foundational approach that starts with setting up their teams, hierarchies and roles before they begin adding users.

- Smaller or flatter organizations may want to simply add users and assign them to teams, hierarchies and roles as they add them. An admin can then refine the teams, roles, and hierarchies afterward.

Role-based Permissions

Chorus comes with the following out-of-the-box Role types:

- **Admin** - This role is in charge of global settings including system set-up and user management. Some settings cannot be changed. Admins also have complete visibility into all recordings and data.

- **Enablement / Leadership** - This role is for members of the Enablement group that support the Sales organization. Their Chorus experience will be tailored to viewing multiple teams' recordings and data.

- **Manager (AE / Other)** - This role is for managers of primary sales and account teams. Their Chorus experience will be tailored to their teams' calls and proactively pushing managers coaching recommendations.

- **Manager (SDR)** - This role is for managers of outbound SDR teams. Similar to the AE Manager, this role type will tailor their experience to their own SDR teams' calls and connection rates, and will also proactively push coaching recommendations.

- **Rep (AE / Other)** - This role is for individual contributors on primary sales and account teams. This view will tailor the rep's experience to their own calls while giving them the flexibility to learn from the top reps.

- **Rep (SDR)** - This role is for individual contributors on outbound SDR teams. Similar to the AE Rep, this role will focus on the individual's calls and connection rates while also permitting SDRs to listen / watch calls from top SDRs on their own team as well as calls AEs are having.

Using role-based permissions, you can:

- Limit deletion or modification of conversation data to only users with the right level of access.

- Enable internal sharing only, and control data sharing by defining who can send recordings to users outside of your organization.

- Allow managers to download recordings so they can listen to recordings offline.

- Let managers develop their own coaching initiatives for their teams.
- Empower managers or reps to create trackers for their team's talk tracks. By setting role-based permissions, team members can contribute to tracker creation. This will enable managers to get more involved in coaching, and reps to create trackers for the key words and phrases they are working on.
- Unlock peer-to-peer coaching for reps, or alternatively, limit access to scorecard completion to managers or enablement users.
- Allow managers to invite users (if managers at your organization own new hire onboarding).

Teams and Hierarchies

You can build teams that reflect your org chart, with reps and their associated front line manager grouped together, enabling each team to share conversations, coach, and learn from each other.

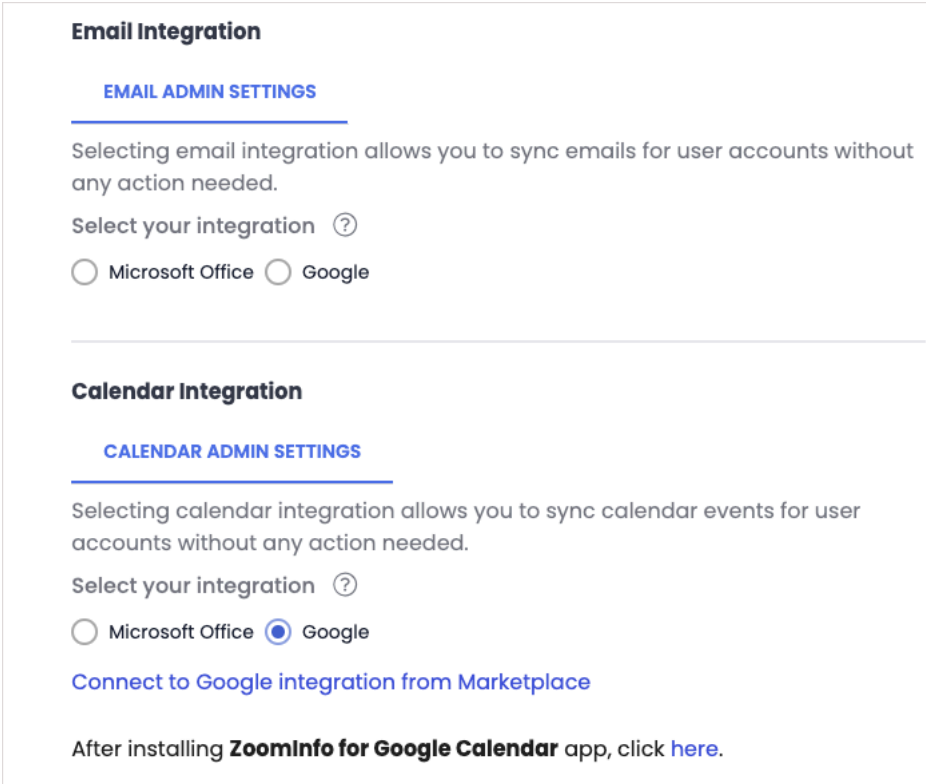
You can organize your teams into a multi-tiered hierarchy that reflects your organization. Central to this structure is the fact that each team has a field to designate the Team Manager. Ideally, all people on a given team should report to this Team Manager in your company's org chart.

Connecting Chorus to Google or Microsoft 365

You can connect your Google account or Microsoft 365 account to Chorus for your entire organization.

Connect Google Email and/or Calendar to Chorus

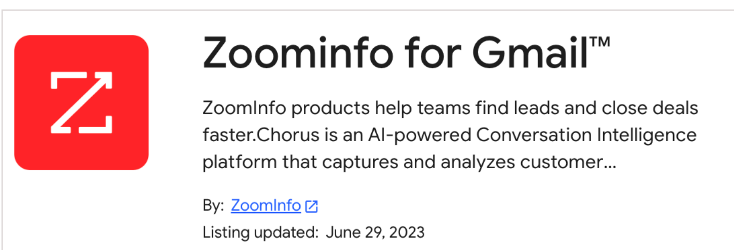
1. Go to **Settings > Integrations**.
2. Scroll to **Email Integration** or **Calendar Integration**.
3. Select **Google**.
4. Click **Connect to Google integration from Marketplace** link.



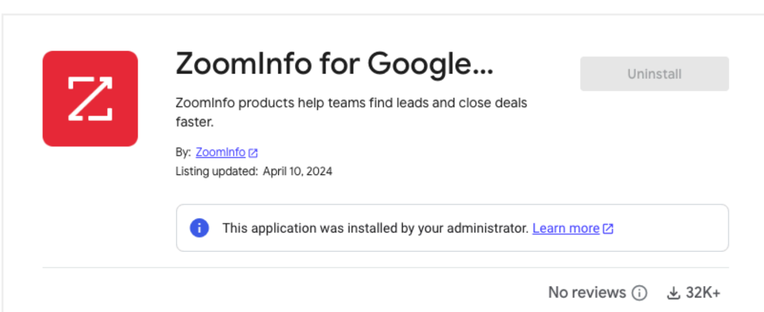
Email sync: [Here is a link to the app] in Google Marketplace.

Calendar sync: [Here is a link to the app] in Google Marketplace.

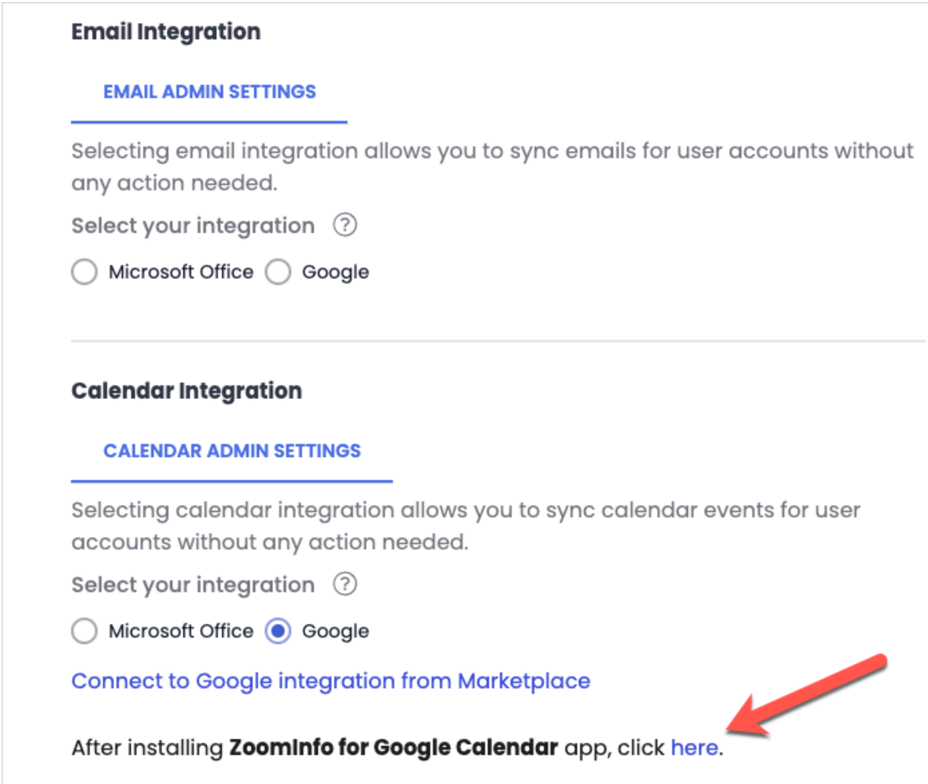
5. From the Google Marketplace, **ZoomInfo for Gmail**, click **Install**.



6. Do the same for **Chorus for Google Calendar** [using this link]. Click **Install**.



7. Once the app is installed, in Chorus under Email or Calendar integration, click the word **here** next to "After installing **ZoomInfo for Gmail** (or **Calendar**) app, click **here**."



8. The success notification displays.

9. See [Import Users via CSV] section below.

If you are using Google and you have not connected your calendar or email to your entire account, you can link your email integration with Chorus through **Personal settings > Link Email / Calendar> Link Gmail/Google Calendar**.

Google Group Permissions for Email and Calendar

Once you've connected your email and calendar for your entire organization, you can create group permissions for Google.

- Establishes a more secure and stable calendar connection
- Ensures that recording is taking place without interference from password changes.
- Enables new users to begin recording without delay.

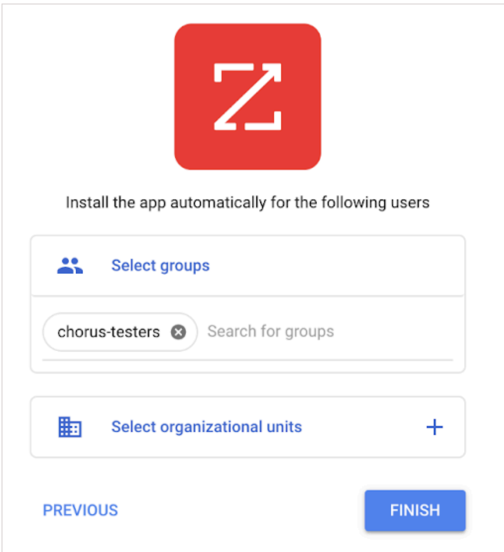
With this feature, admins can manage email sync to their organization with the ability to restrict or permit sync for specific groups.

Prerequisite (for admins): Google Workspace Super Admin must download the permission app from Google Marketplace to sync emails or calendars using Calendar/Email Admin Settings.

.

Email sync: Here is a link to the app in Google Marketplace.

Calendar sync: Here is a link to the app in Google Marketplace.



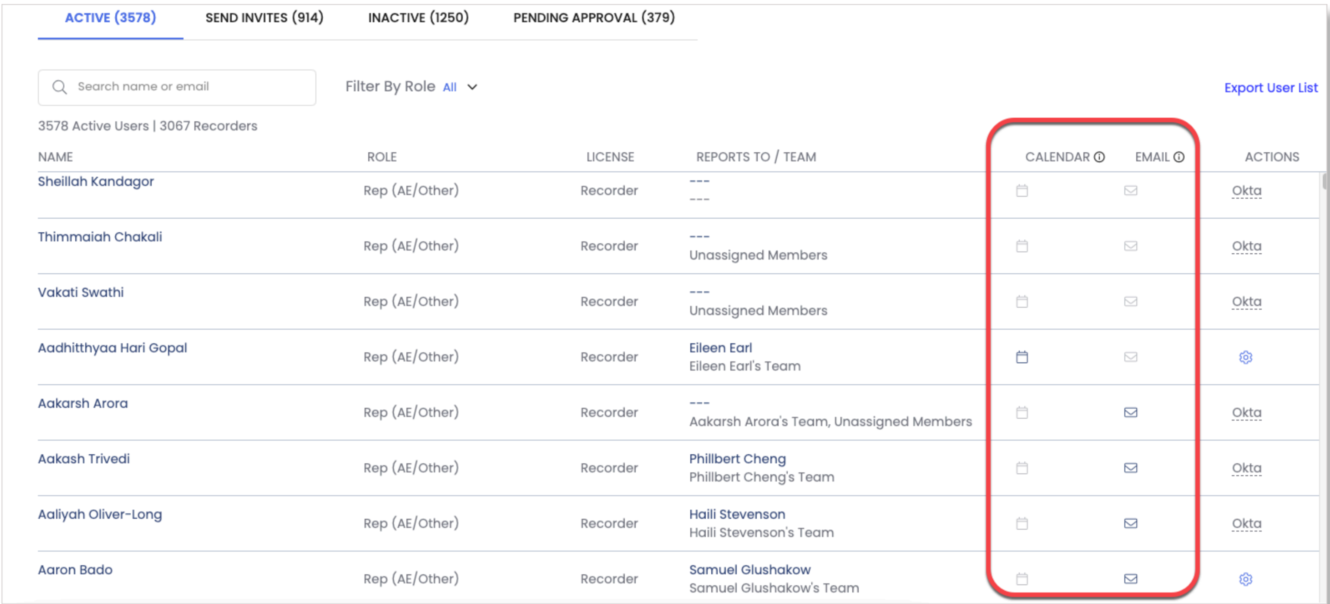
How it works (admins):

1. In Chorus navigate to **Settings > Integrations**.
2. Scroll to **Calendar Admin Settings.**
3. Select **Google** or **Microsoft Office**.
4. Click **Connect**.

For Google, you will be asked to enter your **credentials** and approve relevant permissions.

Important notes for admin settings:

- Admins can grant, or exclude, permission for specific groups.
    - In general, to install the app for everyone in your organization, select everyone at your organization.
    - To install the app only for certain users, select certain groups or organizational units. Then select the organizational units and groups for which you want to install the app.
    - For additional details see the Google documentation.
- Admins can control email sync (for both Microsoft and Google) through user management. Do this by checking or unchecking the envelope icon as shown below.



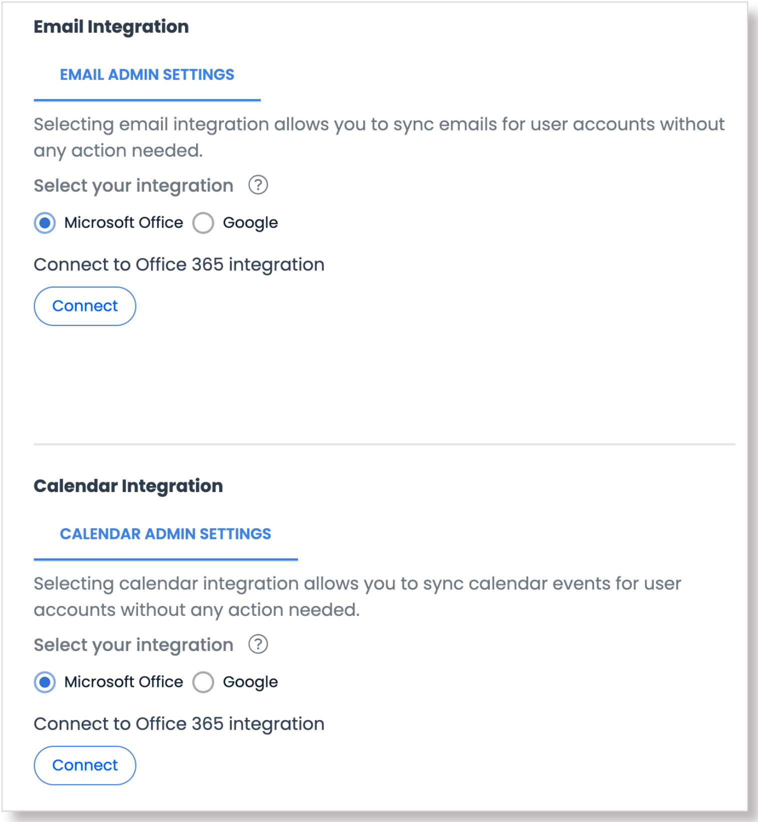
Connect Microsoft Office Email and/or Calendar to Chorus

Chorus admins have the ability to configure Calendar/Email Admin Settings to streamline email integrations by bulk syncing email accounts of individual users to Chorus. This reduces the reliance of integration on individual users with recorder licenses.

Prerequisites (for admins):
• You must have sufficient Azure AD privileges to grant application consent
• Review the specific permissions that will be requested:
 - Calendar: Calendar.Read, User.Read
 - Email: Mail.ReadWrite, Mail.Send

Note: The exact roles and consent process may vary based on your organization's Azure AD configuration and application consent policies. Organizations with custom consent workflows or restricted permissions may need to coordinate with their Azure AD administrator. For highly restricted environments, custom RBAC roles can be created with only the necessary consent permissions.

1. Go to **Settings > Integrations**.
2. Scroll to **Email Integration** or **Calendar Integration**.
3. Select **Microsoft Office**.
4. Click **Connect**.



5. You will be prompted to add your Microsoft Office user credentials and allow Microsoft to access your email/calendar.

6. Follow the prompts to complete the process.

- If you are using Microsoft Office and you have not connected your calendar or email to your entire account, you can link your email integration with Chorus through **Personal settings > Link Email > Link Microsoft Outlook**.

- Admins can control email sync (for both Microsoft and Google) through user management.

Restrict Chorus access to a specific Microsoft 365 Security Group

Configuring Chorus with Microsoft 365 Calendar/ Email Admin settings grants Chorus access to read the calendar events of all users within the tenant. It also grants Chorus access to read and send emails on behalf of users within the tenant.

Prerequisites:

• Exchange Administrator role (minimum) to create Application Access Policies via PowerShell

Note: Role requirements may vary based on your tenant's Exchange and Azure AD configuration

Restricting access

Chorus access can be restricted within Microsoft 365 by creating a security group and two separate [Microsoft 365 Application Access Policies] associated with that group - one for calendar and one for email. Chorus users can then be added to the restricted security group.

How it works (admins):

1. Create a new **ApplicationAccessPolicy** security group in Microsoft 365. Name the group using your current naming conventions. (We suggest *Chorus Calendar/ Email Users*.)
2. Using a powershell, restrict Chorus calendar access to only this group with the following command: (**Note**: the PolicyScopeGroupId may be different depending on how you named your security group in step 1.)

```
New-ApplicationAccessPolicy -AppId f8fef3d2-3d9d-4017-a26f-c2b18937c168
-PolicyScopeGroupId chorus-service-account-users@chorus-auto.com -AccessRight
RestrictAccess -Description "Restrict this app to members of distribution group
ChorusServiceAccountUsers."
```

3. Using a powershell, restrict read/send email access to only this group with the following command: (**Note**: the PolicyScopeGroupId may be different depending on how you named your security group in step 1.)

```
New-ApplicationAccessPolicy -AppId 053d94d2-6e0a-4fba-a3c3-86fa872a6205
-PolicyScopeGroupId chorus-service-account-users@chorus-auto.com -AccessRight
RestrictAccess -Description "Restrict this app to members of distribution group
ChorusServiceAccountUsers."
```

This will grant Chorus access to only the calendar events and emails of Chorus users within the security group created in step 1 and restrict Chorus from reading the data of any other user in the tenant.

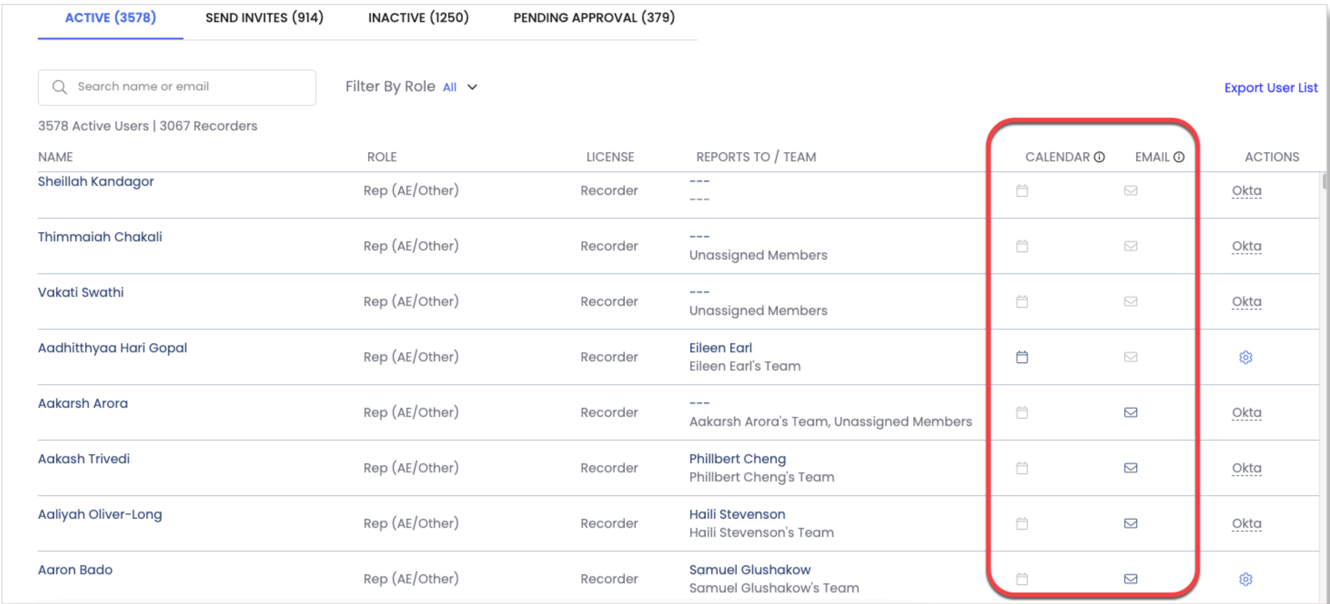
Important: It may take up to one hour for access to be restricted to the security group.
For additional information on creating application access policies and security groups within Microsoft 365, please contact Microsoft support.

Manage Calendar/Email Admin Settings Through Group Permissions

Prerequisite (for Google admins): Google admins must download a permission app from Google Marketplace to sync emails using Calendar/Email Admin Settings. [Here is a link to the app] for Google Marketplace. **Microsoft admins** do not need to complete this step.

Once you have configured your Calendar/Email Admin Settings you can manage Chorus users through User Management.

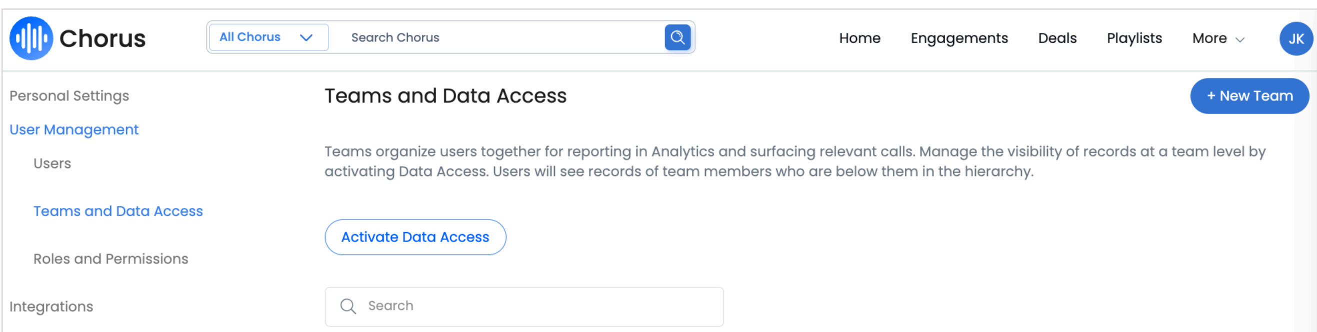
Manage individual users: To manage individual users navigate to **Settings > User Management > Users** and click the calendar or email icon in each user row to enable or disable specific users.



Note: Icons will not be clickable if Calendar/Email Admin Settings has not been configured.

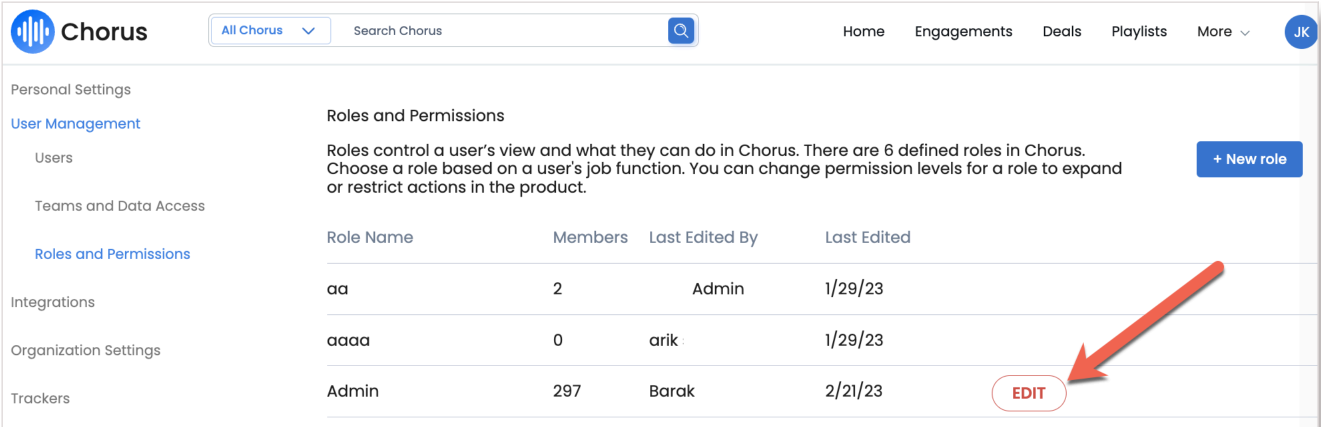
Manage Teams and Data Access

To manage your Chorus teams navigate to **Settings > User Management > Teams and Data Access**.

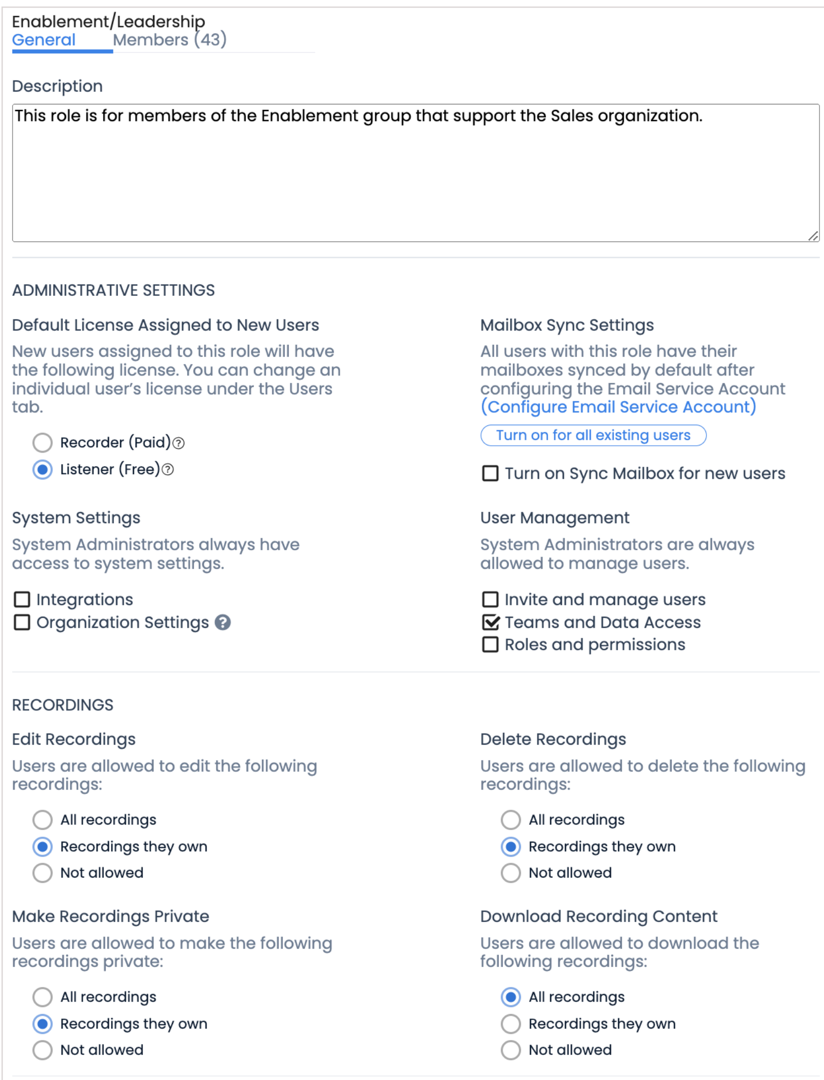


Manage Roles and permissions: To manage your Chorus teams navigate to **Settings > User Management > Roles and Permissions**.

1. Hovering over a row reveals the **Edit** button.



Click **Edit** to open the permissions page where you can manage users associated with a specific role.



Important notes for Calendar/Email Admin Settings :

- Admins can grant or exclude permission for specific groups.

- In general, to install the app for everyone in your organization, select everyone at your organization during the installation process.
- To install the app only for certain users, select certain groups or organizational units.
- Additional details on Google Marketplace apps can be found at Google documentation.

- If you are using **Microsoft Office 365** and you are not using Calendar/Email Admin Settings, you can relink your email integration with Chorus through **Personal settings > Link Email > Link Microsoft Outlook**.
- Admins can control email sync (for both Microsoft and Google) through user management.

Setting Up Integrations, Web Conferencing Providers and Dialers

---

Each organization may have a unique combination of integrations, web conferencing providers, and dialers. See the Chorus Integrations Guide for details on setting up these integrations and connections.

Adding and Organizing Users

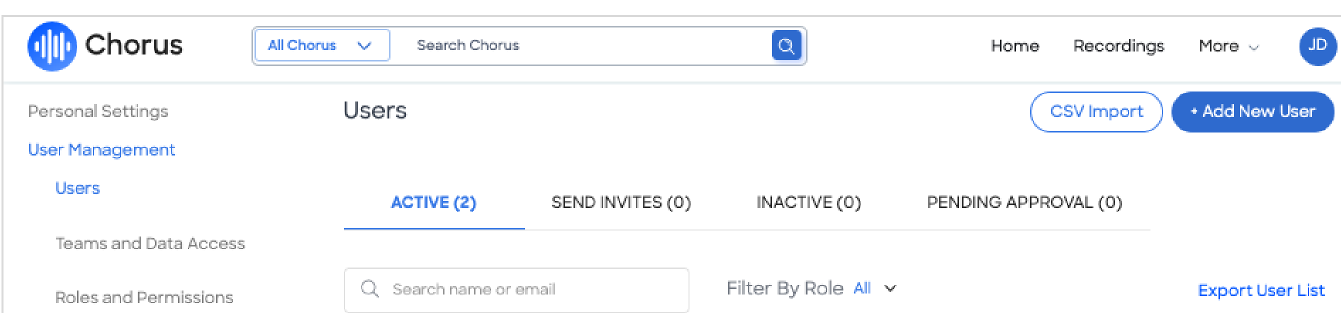
With a better understanding of Key Concepts, you can begin adding and inviting users to Chorus. Throughout this procedure, we'll provide context on how to add and organize your users into appropriate teams, hierarchies, and roles.

Tip: We recommend that you initially add your Admins, integration users (e.g., your CRM admin), and leadership. You can add the rest of your organization's users after your integrations have been configured. This will ensure your teams and individual reps have a smooth onboarding experience.

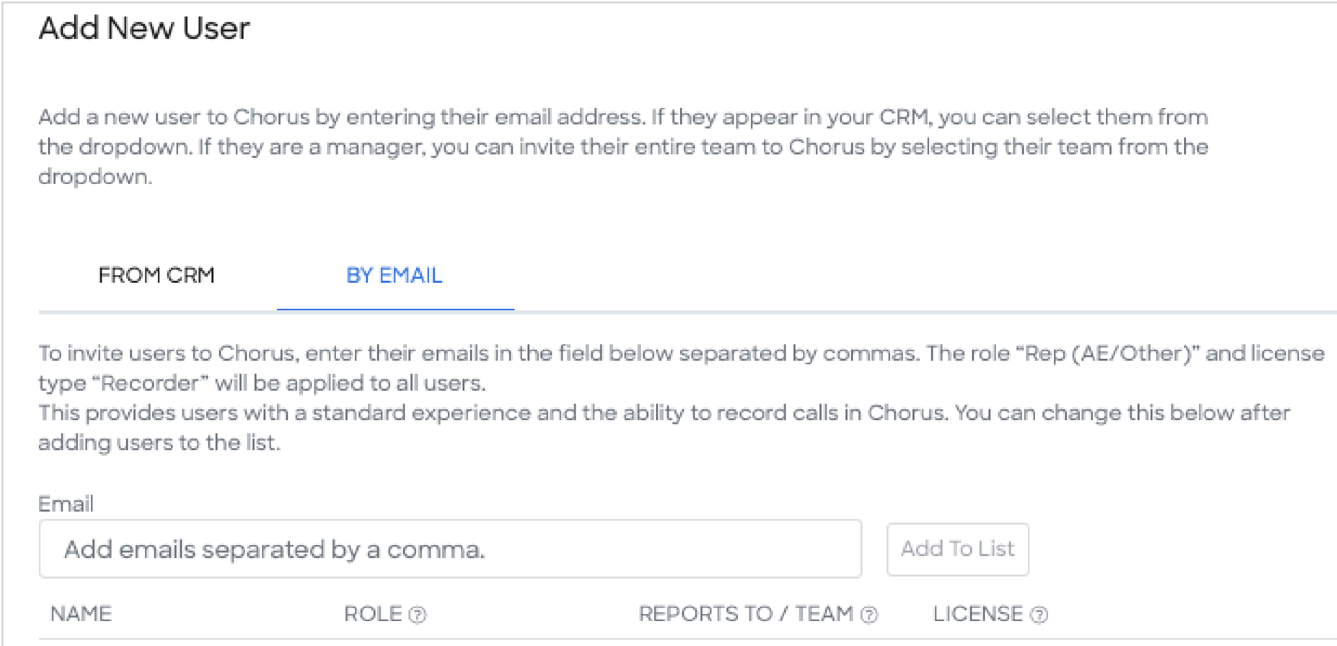
Add Users

To add users:

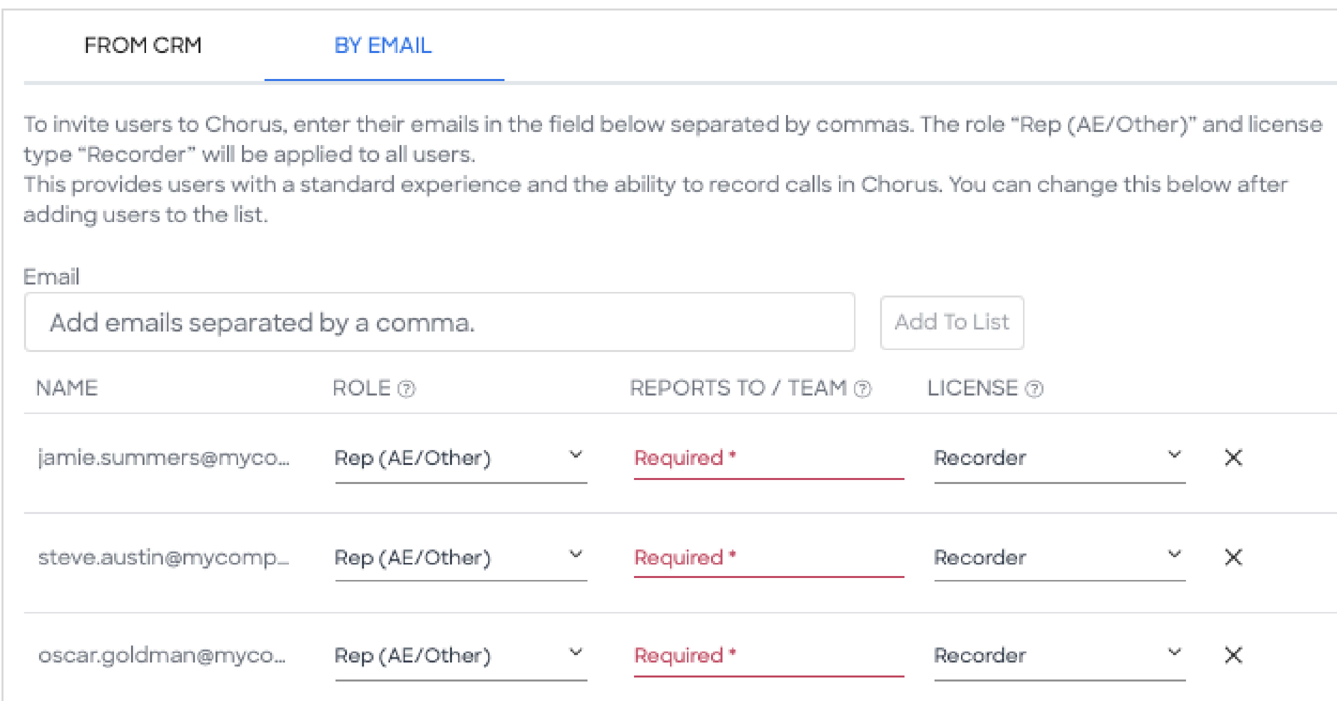
1. Sign into Chorus as an admin, click your initials in the top right, and click **Settings**.
2. Select **User Management**.



3. Click **Add New User** and click the **By Email** tab.



4. Type an email address (or multiple email addresses separated by a comma) and click **Add to List**.



Set the User Role

When selecting a role for a user, it's important to understand what functionality the user will need to access.

- Each role type will have a custom Chorus experience based on the needs of that role.

- Later, you can define role-based permissions for capabilities such as modifying recordings, sharing, coaching, setting up trackers and other admin controls.

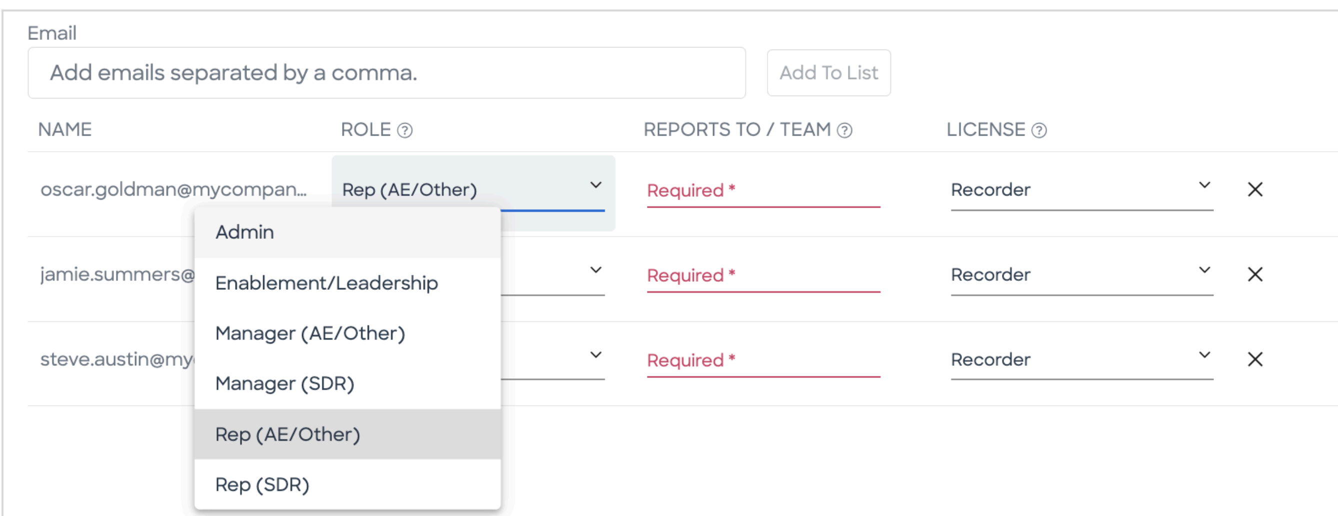
Chorus has a default set of roles that you can use out-of-the-box or customize as needed.

- Admin
- Enablement/Leadership
- Manager (AE/Other)
- Manager (SDR)
- Rep (AE/Other)
- Rep (SDR)
- Unassigned New User

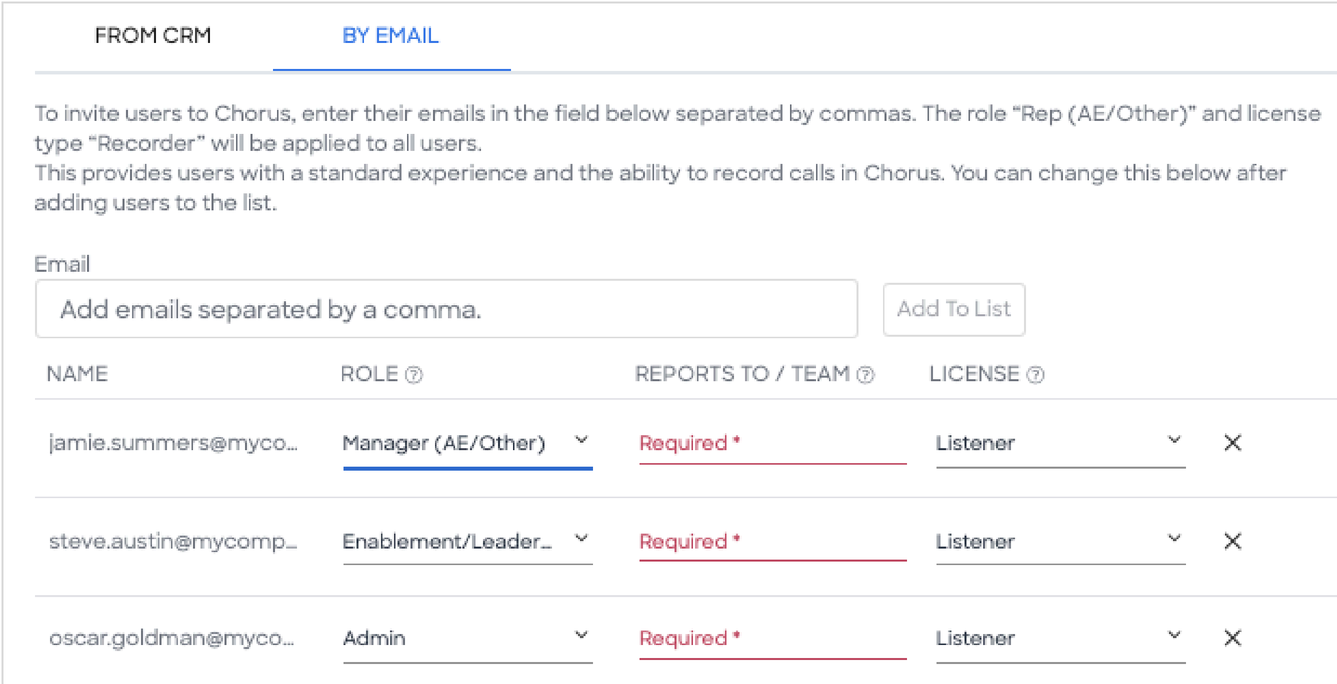
See [Role-based Permissions]() for more details on these out-of-the-box roles that you can customize for your organization.

For this procedure, let's assume you are utilizing the default roles provided in Chorus. Newly-added users are initially assigned to the *Rep (AE/Other)* role. To change the role:

1. Click the **Role** dropdown.



2. Select an appropriate role type for each user.

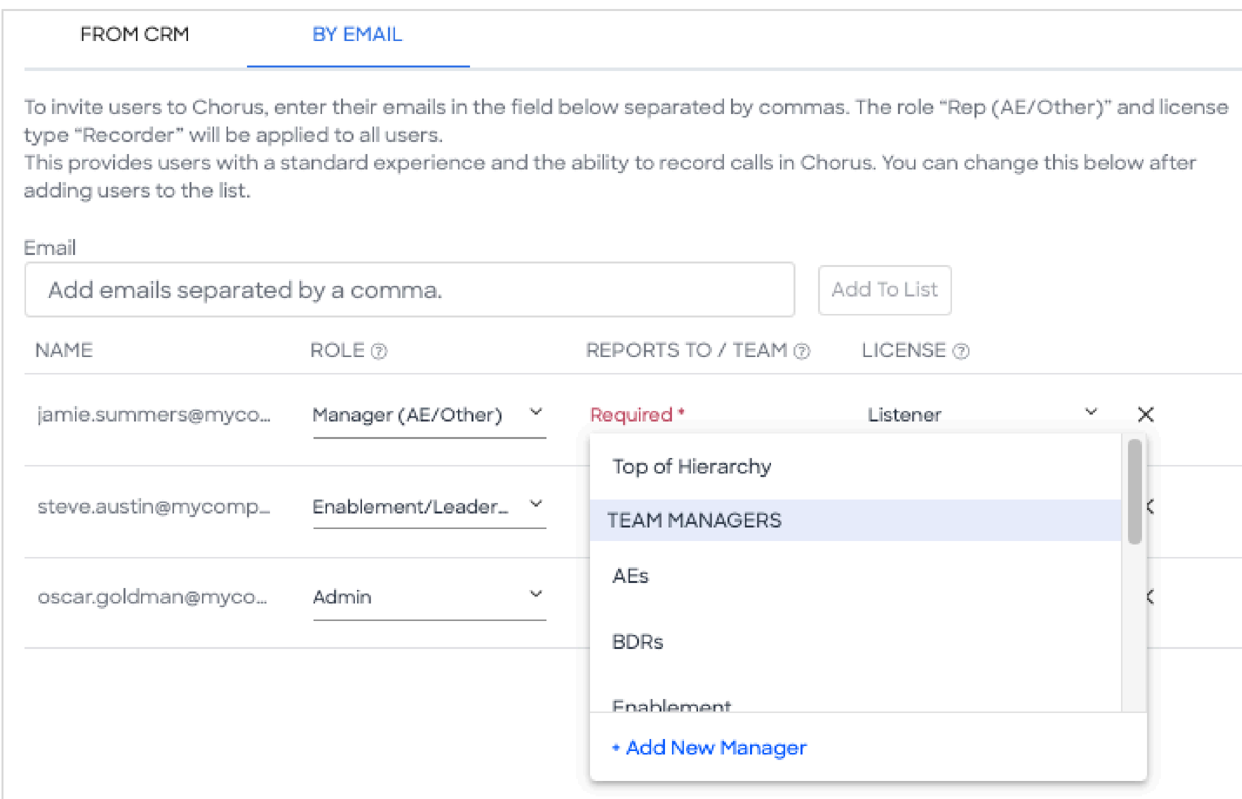


Assign Users to a Team

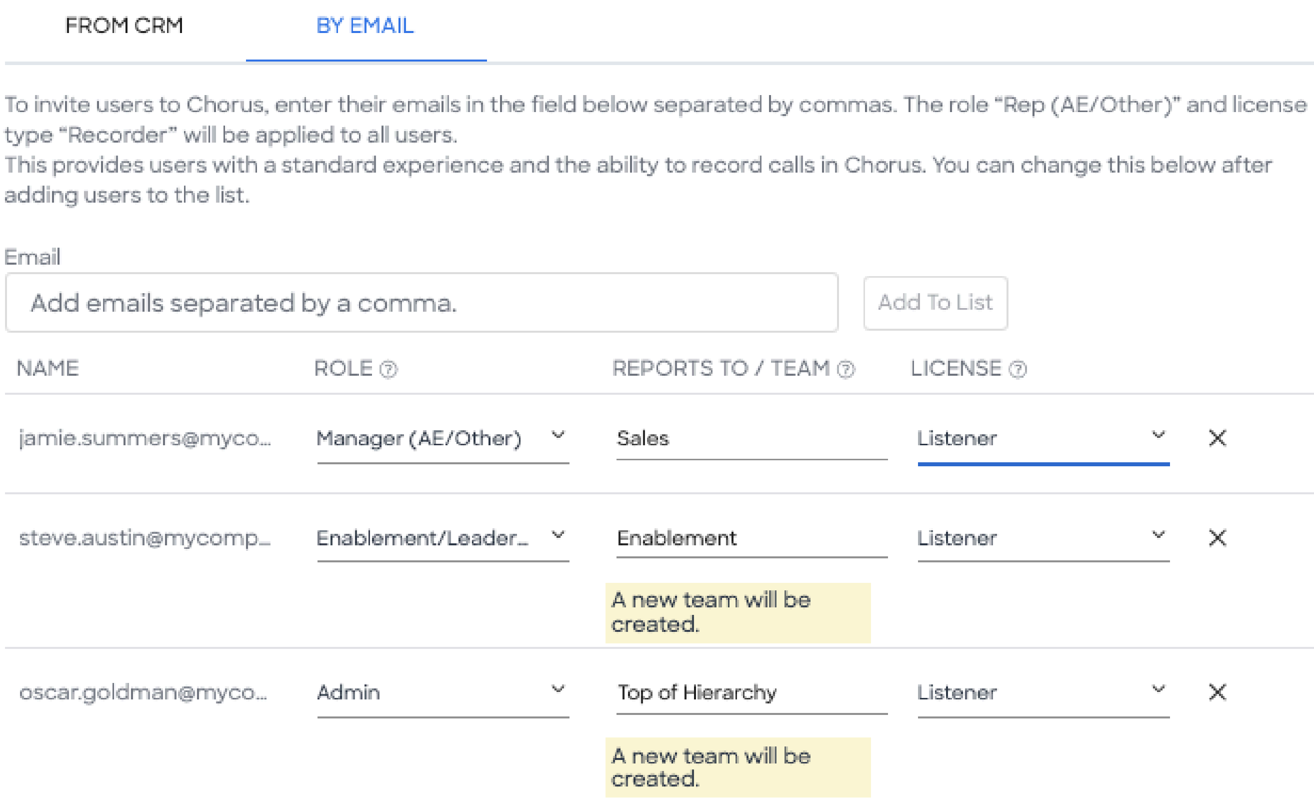
Chorus has a default set of teams that you can use out-of-the-box or customize as needed.

For this procedure, let's assume you are utilizing the default teams provided in Chorus.

1. Click **Reports To/Team** dropdown.



2. Select an appropriate team for each user.



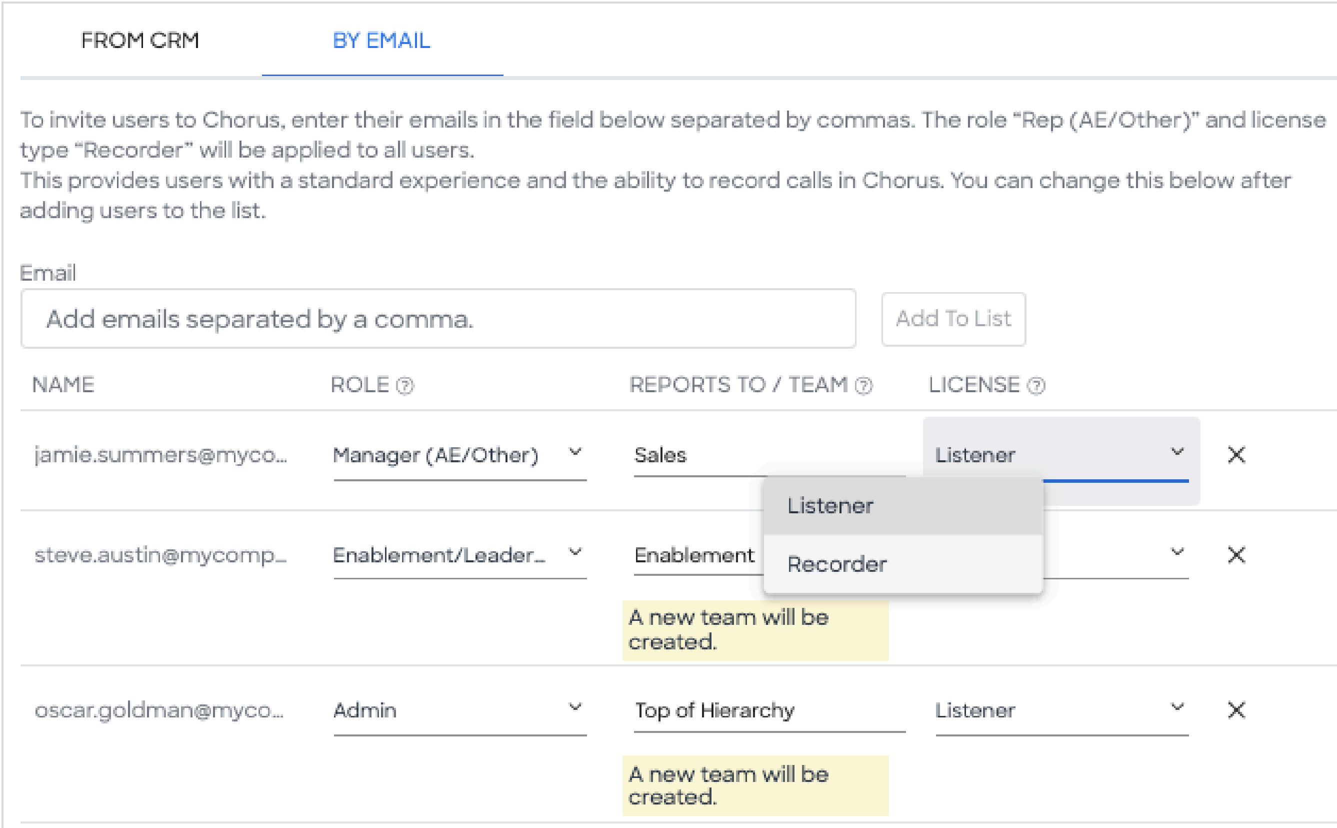
Select a License Type for Each User

Chorus has two license types:

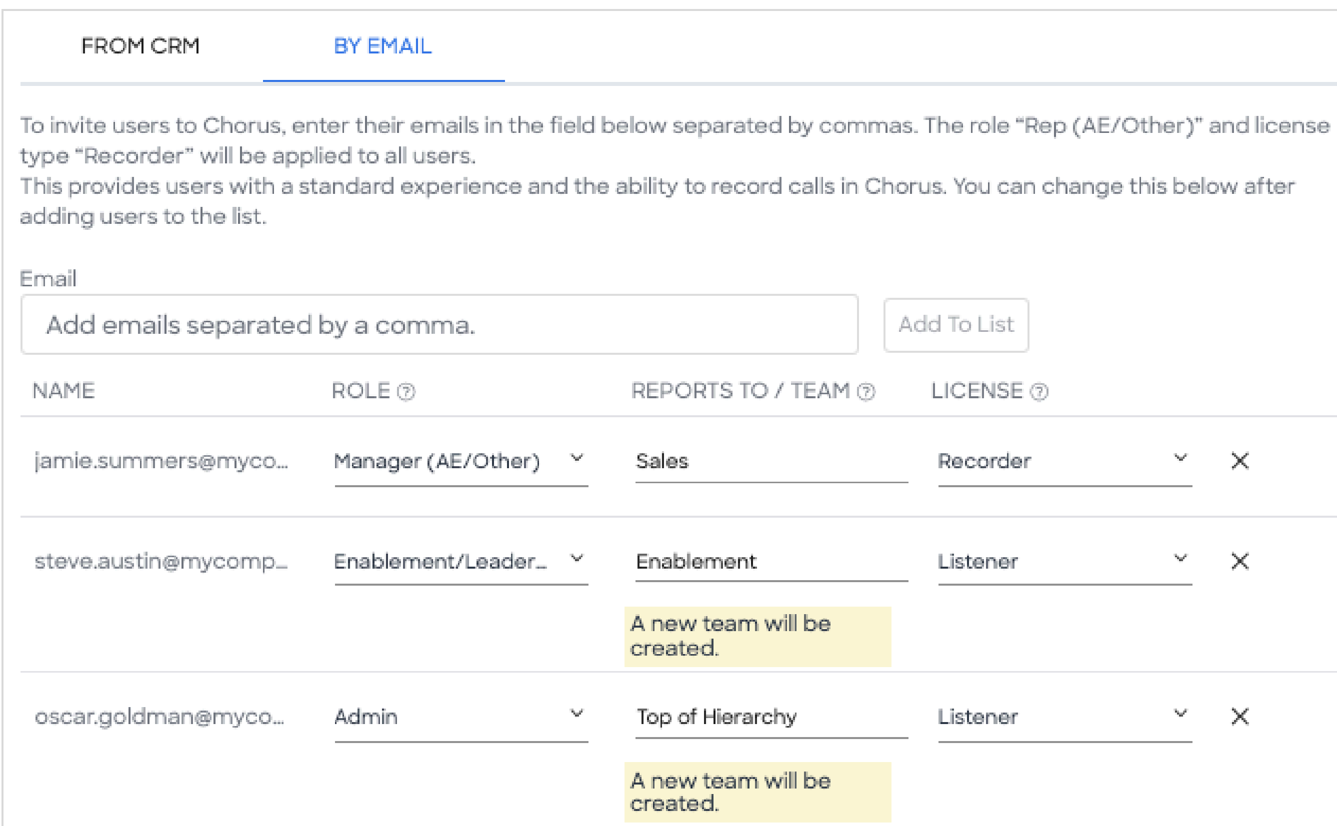
- **Recorders** are paid seats for people who are actively recording their meetings and want them to appear in Chorus.
- **Listeners** are free and have access to everything in the platform Recorders do. Chorus does not capture any Listener meetings in Chorus.

To select the license type:

1. Click the **License** dropdown.



2. Select an appropriate license type for each user.

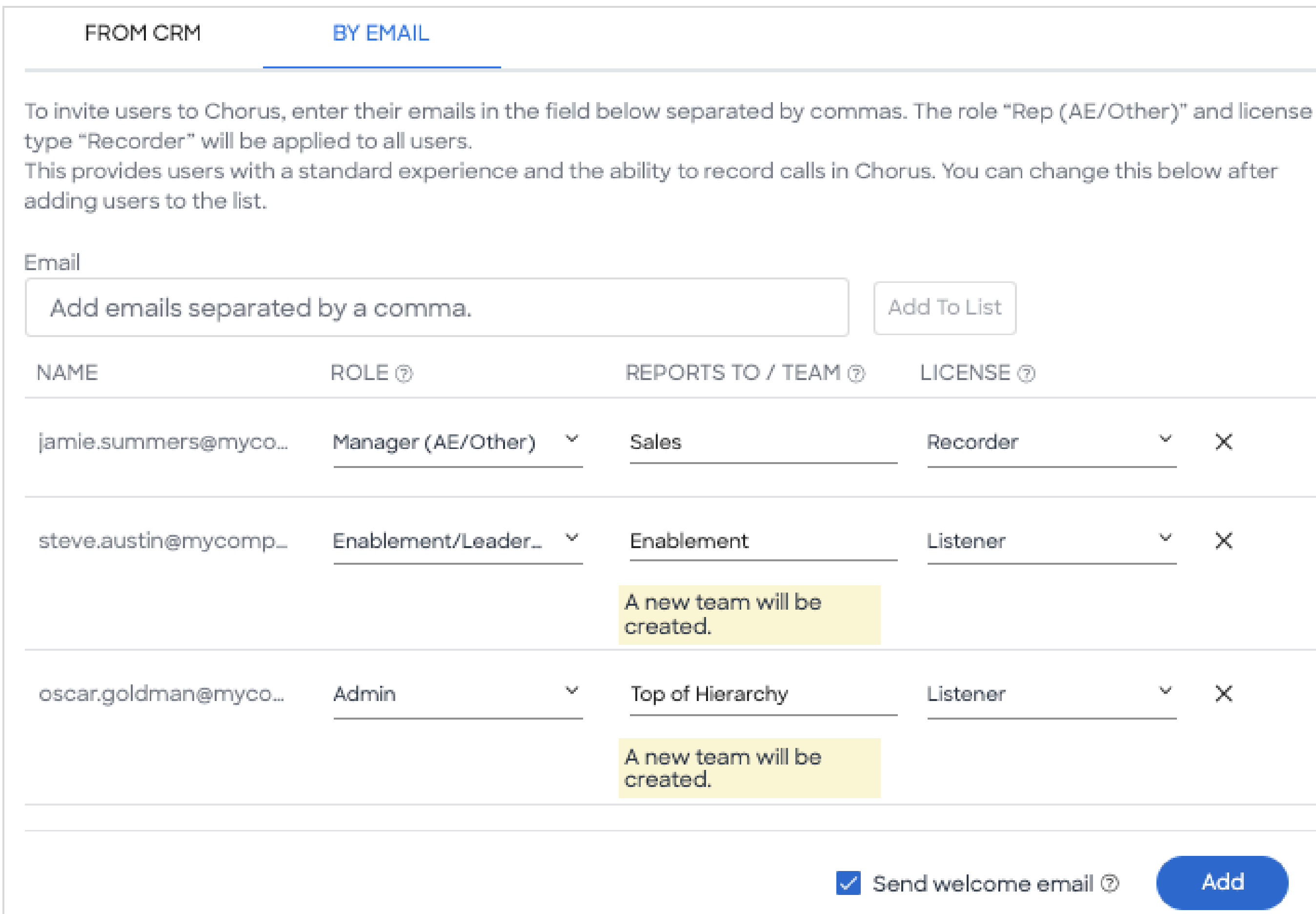


Invite Your Users

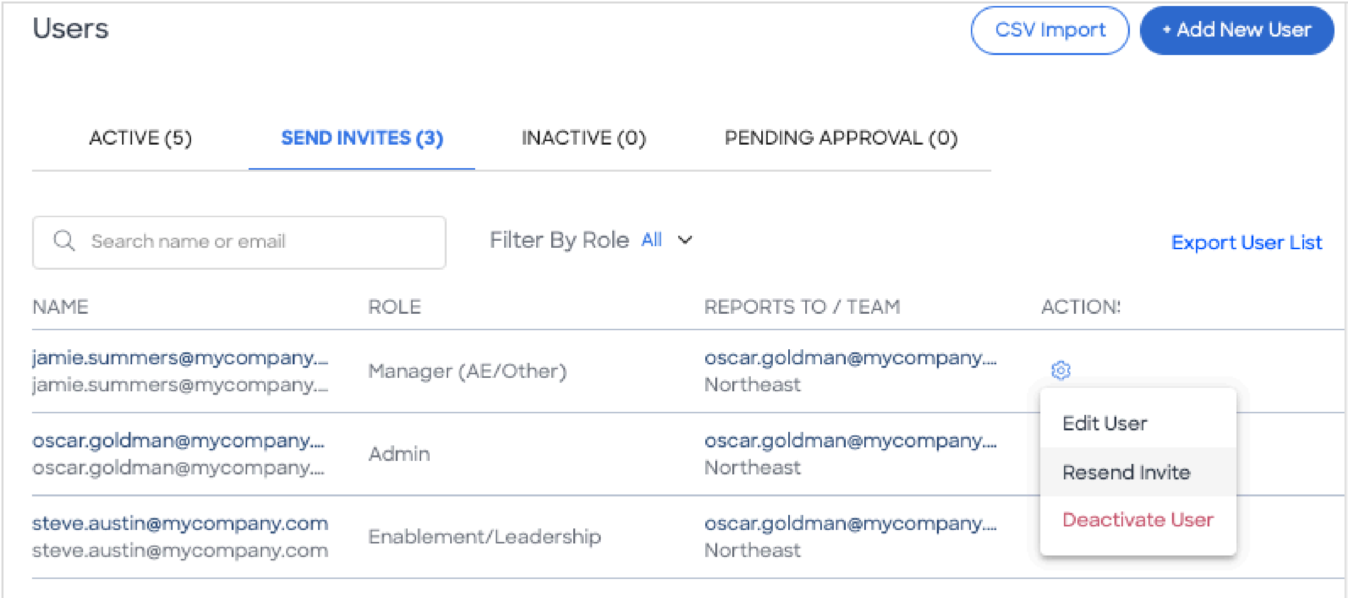
When you're ready to invite a user, you can generate a welcome email that enables them to get started with Chorus.

Tip: You should consider the timing for sending the welcome email inviting your users to Chorus. For example, by inviting your initial users first (e.g., admins, CRM admins, and leadership), you can ensure that your roles and teams are in place and your integrations are established before inviting the rest of your users.

In the example below, we've added 3 new users and can collectively invite them by leaving the **Send welcome email** option checked.

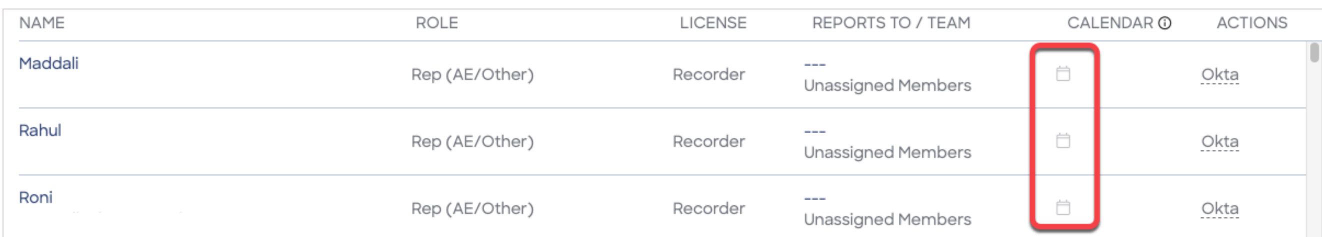


Alternatively, you can choose to add these users without generating a welcome email just yet by unchecking the **Send welcome email** checkbox. You can do that later from the **Users** page.



Sync Status

As your new users are onboarded to Chorus and connect their calendars, the **Sync** column will reflect their status.



- **Dark calendar icon** - The user has successfully logged in and connected their calendar
- **Grayed-out calendar icon** - The user has successfully logged in, but has not yet connected their calendar
- **No icon** - The user has not responded yet to the welcome email

Actions

You can click the gear icon under **Actions** to take the following actions for a user:

- **Edit User** - Update the user's role, team, or license type
- **Deactivate User** - Deactivate the user from Chorus

Send Invites

You can click the **Send Invites** tab to see the list of users who were sent welcome emails. If a user has not received the email, you can click the gear icon under **Actions** to resend it.

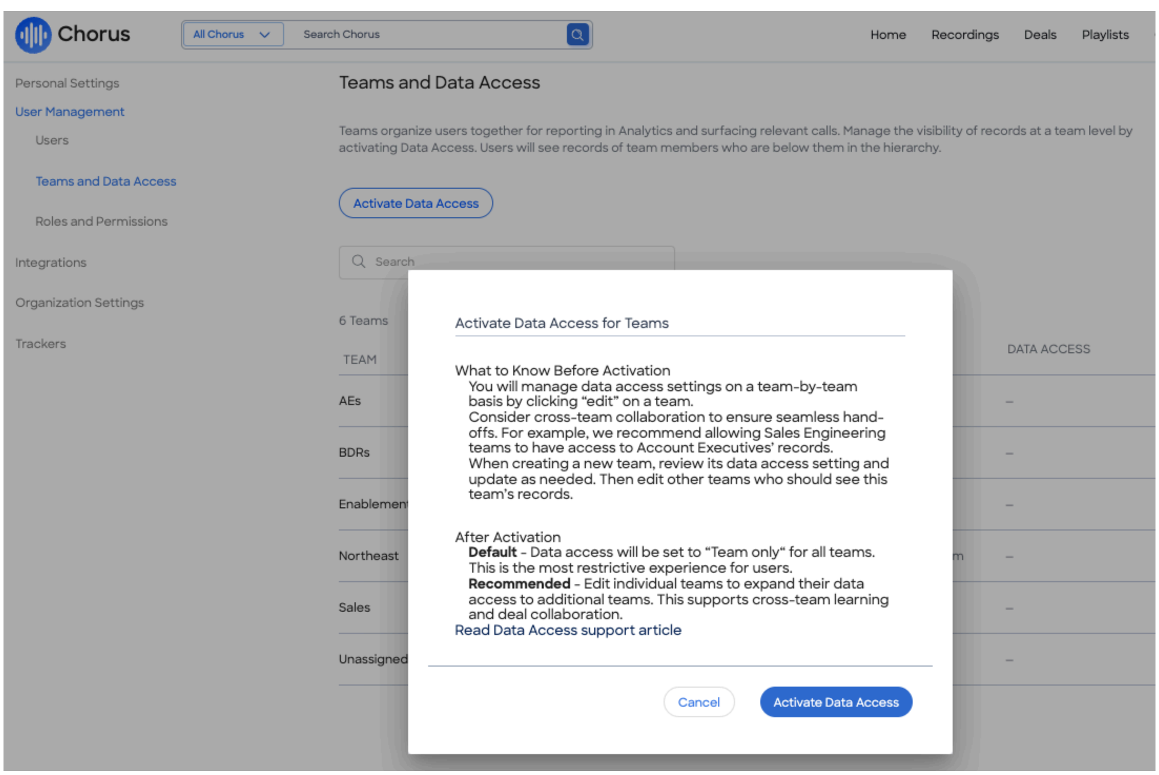
Control Access to Recordings and Data

By default, anyone from any team in your organization has access to all records and recordings throughout Chorus, with the exception of Private Recordings. Assuming you are organizing your Chorus users by team, you can activate data access permissions to control which teams' recordings and data are accessible to other teams.

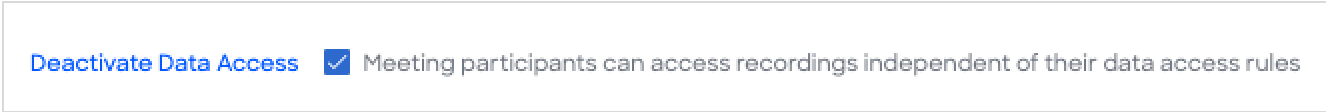
Note: You can also choose to activate Data Access Permissions after you set up your teams and invite users.

To activate Data Access Permissions:

1. Go to **User Management > Teams and Data Access** and click **Activate Data Access**.
2. Review the confirmation message and click **Activate Data Access**.



The Teams and Data Access page now indicates that data access is enabled.



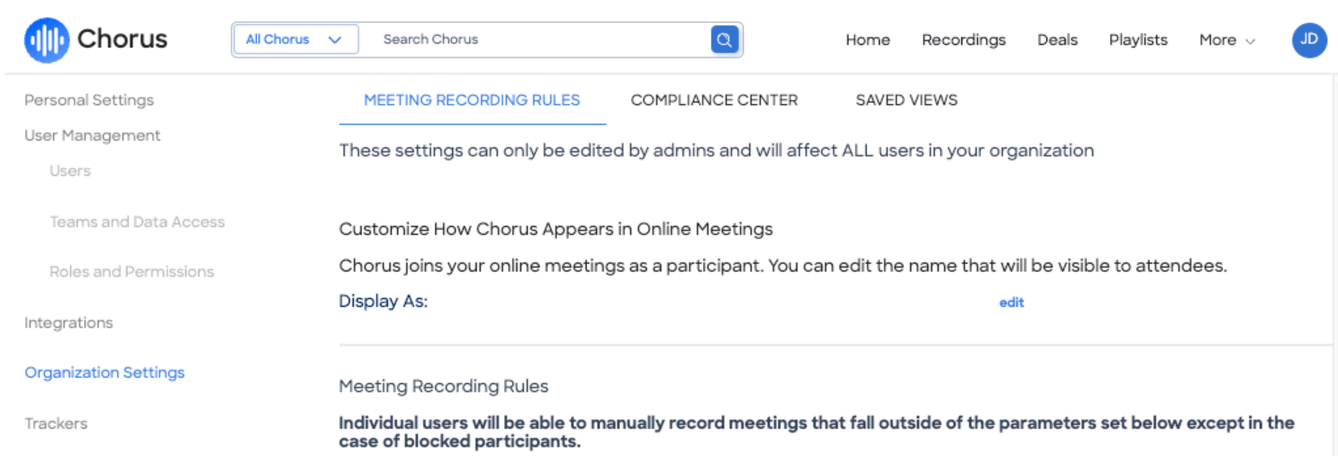
Configuring Organization Settings

Use the **Organization Settings** page to configure meeting recording rules and compliance for your organization. You can also set up the Chorus Scheduler for either Google Calendar or Microsoft Outlook.

Important: Before configuring your Organization Settings, ensure that you have already added and invited your initial users and set up your integrations.

Configure Meeting Recording Rules

Go to **Organization Settings > Meeting Recording Rules** tab.



You can configure the following settings on this tab:

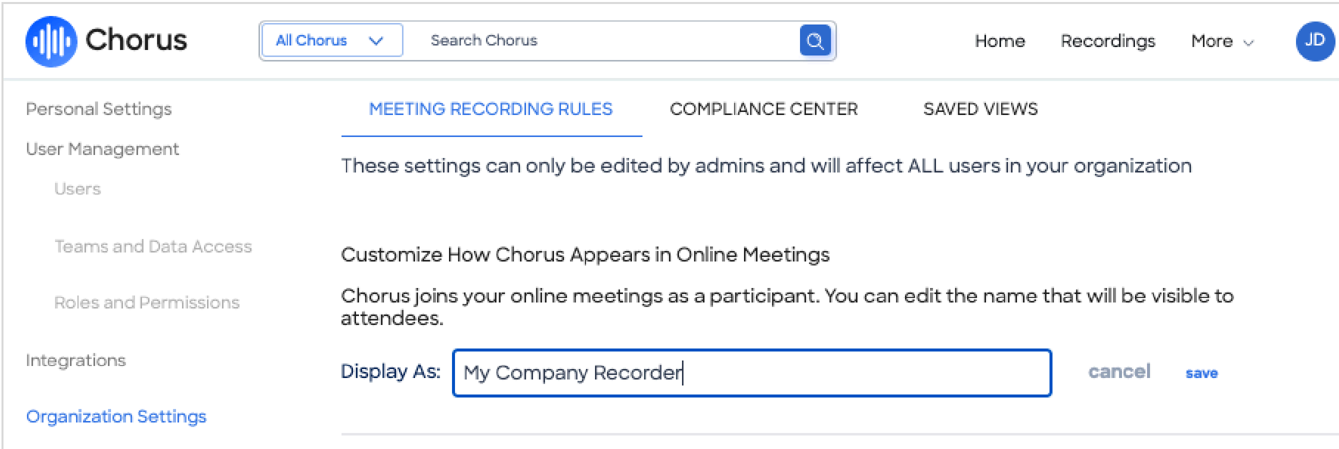
- Customize How Chorus Notetaker Displays When Recording Online Meetings
- Manage Recording Rules
- Set Up Pre-Meeting Notifications
- Block Or Ignore Certain Email Domains
- Manage Chorus Recording Ownership

Customize How Chorus Notetaker Displays When Recording Online Meetings

You can customize the display name for Chorus when it joins your online meetings as a participant.

1. Go to the **Organization Settings > Meeting Recording Rules** tab.

2. In the **Customize How Chorus Appears in Online Meetings** section, provide the Chorus Notetaker name in the **Display As** field and click **Save**.



Note: Not all conferencing platforms support the renaming of the Chorus Notetaker, and the custom name in the **Display As** field is not supported for Google Meet. All other supported conference providers including Zoom, Microsoft Teams and Webex support custom Notetaker names.

Manage Recording Rules

This key setting controls how Chorus behaves to determine which meetings to record for your entire organization. Chorus determines which meetings to record by scanning a recorder's calendar for the following:

1. Is there a screen share link (Zoom, WebEx, UberConference, BlueJeans, GoToMeeting, etc)?
2. Is there an external participant on the invite?

If both requirements are satisfied, Chorus records the meeting.

To select the appropriate recording rule for your organization:

1. Go to the **Organization Settings** > **Meeting Recording Rules** tab.
2. Scroll to the **Meeting Recording Rules** section.

3. Select from one of the three options provided:

   Record all meetings that a Chorus Recorder attends: This is the least restrictive option. For any meeting on your calendar—whether it's organized by you or by an outside party—and has an external domain on the calendar event, Chorus will record the call or meeting.

   Only record meetings that are organized (owned) by an internal party (same email domain as Chorus Recorder): This is the default setting, and the recommended option. Chorus will only record conversations or meetings that are organized either by a Chorus Recorder from your company, or as a participant, as long as the meeting was organized by someone in your company. Chorus will not join meetings that are organized by your prospects/customers.

   Only record meetings that Chorus Recorders organize (calendar owner): This is the most restrictive option. Chorus will only record meetings that were organized by someone who has a Chorus Recorder license in your company. This means you have to be both the event organizer and a Chorus Recorder.

   The drawback with this option here is that a lot of businesses have BDR/SDR/ADR's that book meetings for AE's. If the BDR/SDR/ADR rep is the organizer of that meeting but does not have a Chorus Recorder license, Chorus will not record.

Set Up Pre-Meeting Notifications

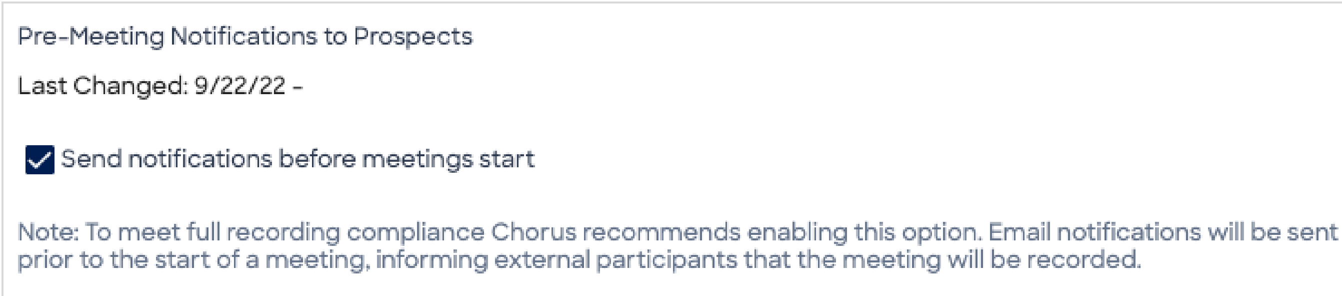
You can configure the option for Chorus to send pre-meeting notifications to prospects 10 minutes prior to the start of each meeting that informs participants that the meeting will be recorded.

To enable notifications:

1. Go to the **Organization Settings** > **Meeting Recording Rules** tab.

2. Scroll to the **Pre-Meeting Notifications to Prospects** section.

3. Select the **Send notifications before meetings start** checkbox.



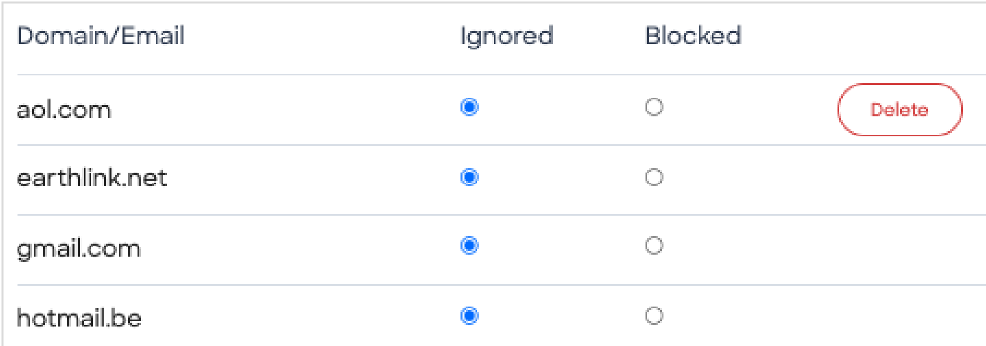
Block Or Ignore Certain Email Domains

By default, Chorus will record any meetings that include external participants. You can further customize this behavior by designating email domains and email addresses that you want to ignore or block. These settings apply across your entire organization.

- **Block**
  - For meetings, if just one external participant email domain or email address is set to **Block**, then the meeting will not be recorded.
  - This also applies to emails. If just one addressee has an email domain or email address set to **Block**, then email will not be ingested into Chorus.
- **Ignore**
  - For meetings, if all of the external participants are set to **Ignore**, the meeting will not be recorded. If there are any external participants in the meeting NOT set to **Ignore**, the meeting will still be recorded.
  - These scenarios also apply to emails. If all of the external addresses have email domains or email addresses that are set to Ignore, the email will not be ingested. If there are any external addresses NOT set to **Ignore**, the email will still be ingested.

To select domains to ignore or block:

1. Go to the **Organization Settings** > **Meeting Recording Rules** tab.
2. Scroll to the **Do Not Record & Do Not Sync** section.
3. By default, Chorus includes common domains in the **Ignored** list. You can remove domains from this list by hovering over the Domain/Email and clicking **Delete**.



4. Add domains to the **Ignored** or **Blocked** list by typing a domain name, selecting **Ignore** or **Block**, and then clicking **Add**.

Once you save these settings, updates for blocked or ignored domains will take 8 hours to go into effect for meetings.

Manage Chorus Recording Ownership

Once a meeting is completed, Chorus assigns a person as the recording owner in Chorus based upon this setting. This setting is applied organization-wide. There are two ways Chorus assigns ownership to a user:

- Calendar: Meeting Organizer
- CRM: Record Owner

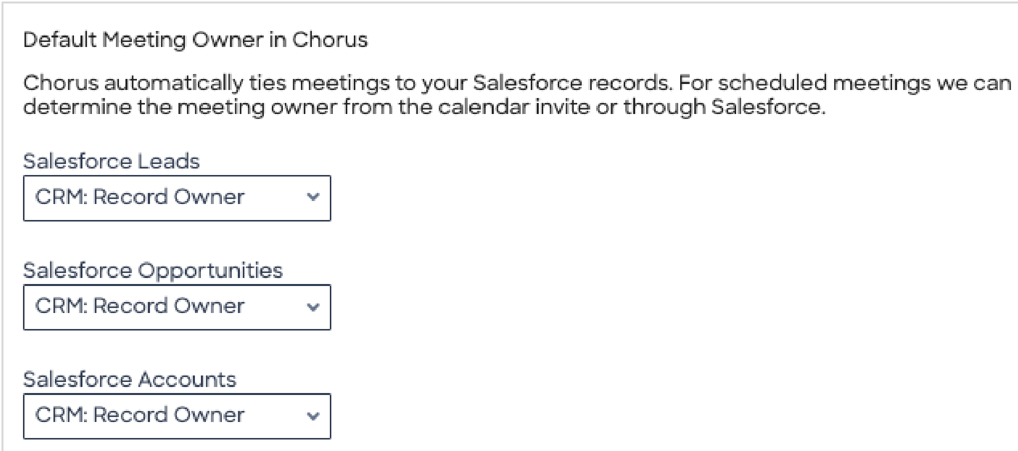
Assuming Chorus is integrated with your CRM, we recommend choosing **CRM: Record Owner** for all 3 different objects (Leads, Opportunities, Accounts). Here's an example that illustrates why this option is recommended:

When a BDR books a meeting for an AE, the call is then owned by the AE since they are the Salesforce record owner, rather than the call being attributed to the BDR, who sent out the calendar invitation. This setting assigns recordings to the correct user who has ownership of that Lead, Opportunity, or Account in your CRM.

Typical sales organizations have BDR/SDR/ADR's maintain ownership of Lead records, while AEs have ownership of Opportunities, and AEs/CSMs/AMs blend ownership of Accounts depending on an organization's sales process.

To set the default meeting owner:

1. Navigate to **Organization Settings**. The **Chorus Meeting Recording Rules** tab displays by default.
2. Scroll to the **Default Meeting Owner in Chorus** section.



3. Click on each object type (Leads, Opportunities, Accounts) and adjust how Chorus assigns the ownership.

Configure Compliance Settings

This section describes three important steps to ensure the correct activation of Compliance:

1. Activate Compliance Mode
2. Install the Chorus Scheduler (for Google or Microsoft)
3. Assign Compliance Mode to specific roles.

Once Compliance Mode is activated and the Chorus Scheduler is installed, Chorus admins have the option to Enable or Enforce compliance by role.

Activate Compliance Mode

Important: Before you begin, note that Chorus does NOT provide legal counsel. To ensure your company is following the right compliance workflows for your organization please review with the necessary internal personnel, or seek legal counsel.

Chorus Compliance Mode is an organizational setting that can be enforced or enabled by role, activating the Chorus Scheduler and Go-Link workflows for compliance capture. This enables you to use the Chorus Scheduler to schedule meetings and gather recording consent in a seamless and automated way.

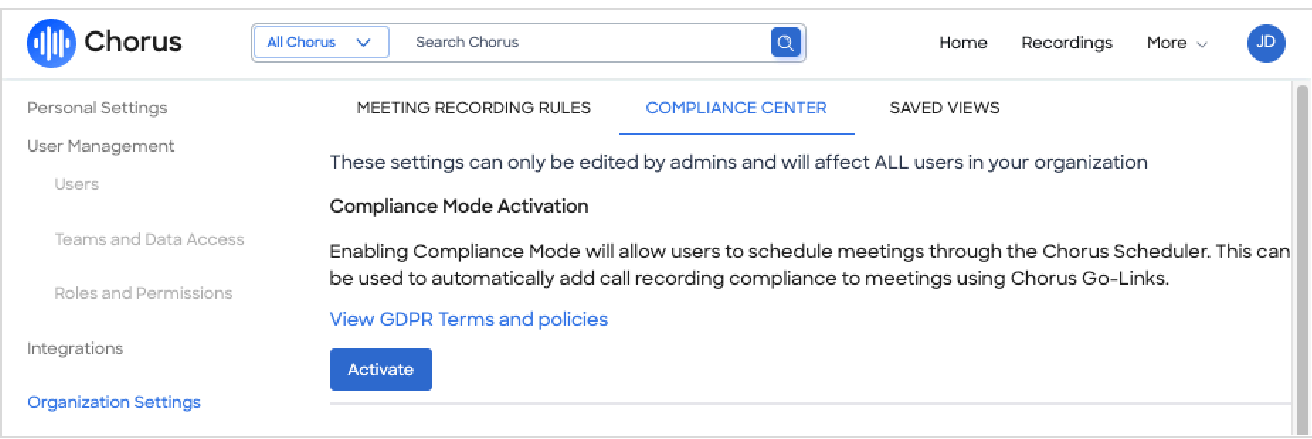
- **Chorus Scheduler** is a calendar add-on that enables you to schedule meetings. It automatically translates web conferencing URLs to Go-Links to initiate compliance capture flows in Google calendar.
- **Go-Links** are a URL (go.chorus.ai) that routes meeting attendees to a landing page that dynamically updates to capture recording consent prior to joining a meeting. When an attendee joins a meeting via a Chorus Go-Link, they are routed to a dynamic landing page that updates with options to opt-in or out of recording based on their location.

  - If they are in a location governed by GDPR, then the landing page will include two options to **Join with Recording** or **Join without Recording**.
  - By selecting **Join with Recording**, the attendee has provided consent in compliance with GDPR, and Chorus will record the meeting.
  - If they choose to **Join without Recording**, Chorus will not record.

  This automated flow empowers reps to focus on the meeting without worrying about the geographical location (or general recording preferences) of their attendees.

To activate Compliance Mode:

1. Navigate to **Organization Settings**.
2. Click the **Compliance Center** tab.
3. Under **Compliance Mode Activation**, review the GDPR terms and policies provided in the link.



4. Click **Activate**.

   A prompt displays to confirm that the workflow was reviewed with a member of your organization's legal or data ethics team.

5. Confirm the prompt. Compliance Mode is activated for your organization.

Install the Chorus Scheduler for Google

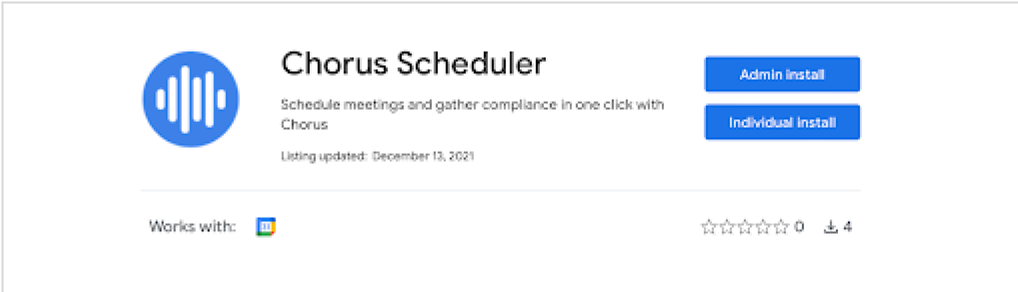
The Chorus Scheduler enables reps to seamlessly capture recording consent in compliance with GDPR and other call recording regulations or preferences. The Scheduler automatically generates a Chorus Go-Link (a URL containing go.chorus.ai) that routes meeting attendees to a dynamic landing page that provides options based on the attendee's location to join, with or without recording. By selecting their preference to join the meeting, consent has been captured and Chorus will record accordingly.

Prerequisites:

- Ensure that you've [activated Compliance Mode]
- You must have Google Workspace Admin privileges to perform this procedure

To install the Chorus Scheduler for Google Calendar for your organization:

1. Navigate to the Chorus Scheduler for Google app in the [Google Workspace marketplace](#).

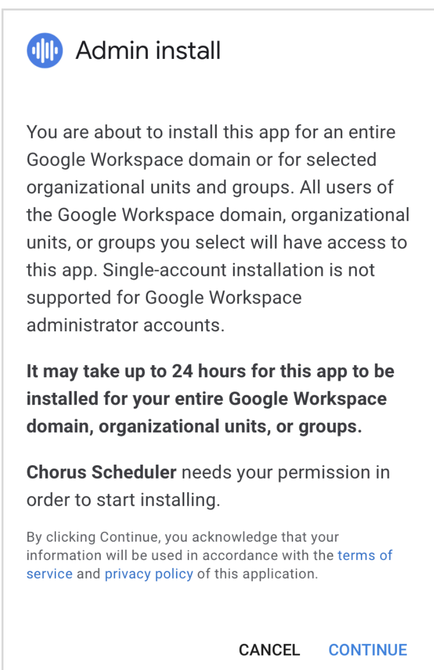


2. Click **Admin Install**.

   Note: If you do not see an **Admin Install** button, and only one **Install** button, this means you are not logged in as a Google Workspace Admin, or that you do not have the right admin credentials.

   We recommend installing for the entire org if there are no implications, as many sales and account reps frequently switch roles. If you prefer to pre-install only for a specific set of users, please refer to Google's documentation for [setting up Google Groups](#).

3. Review the information provided.



4. Click **Continue**.

Once complete, you can inform your users that they have now access to the Scheduler on their Google Calendar. Provide the following article to your organization's users that describes how to use the [Chorus Scheduler for Google](#).

If you use Zoom, ensure the Zoom Native Integration is installed as described in the Chorus Integrations Guide. Without this integration, Zoom will limit the Scheduler functionality to manual link creation only, and won't create Go-Links automatically.

Install the Chorus Scheduler for Microsoft Outlook

The Chorus Scheduler enables reps to seamlessly capture recording consent in compliance with GDPR and other call recording regulations or preferences. The Scheduler automatically generates a Chorus Go-Link (a URL containing go.chorus.ai) that routes meeting attendees to a dynamic landing page that provides options based on the attendee's location to join, with or without recording. By selecting their preference to join the meeting, consent has been captured and Chorus will record accordingly.

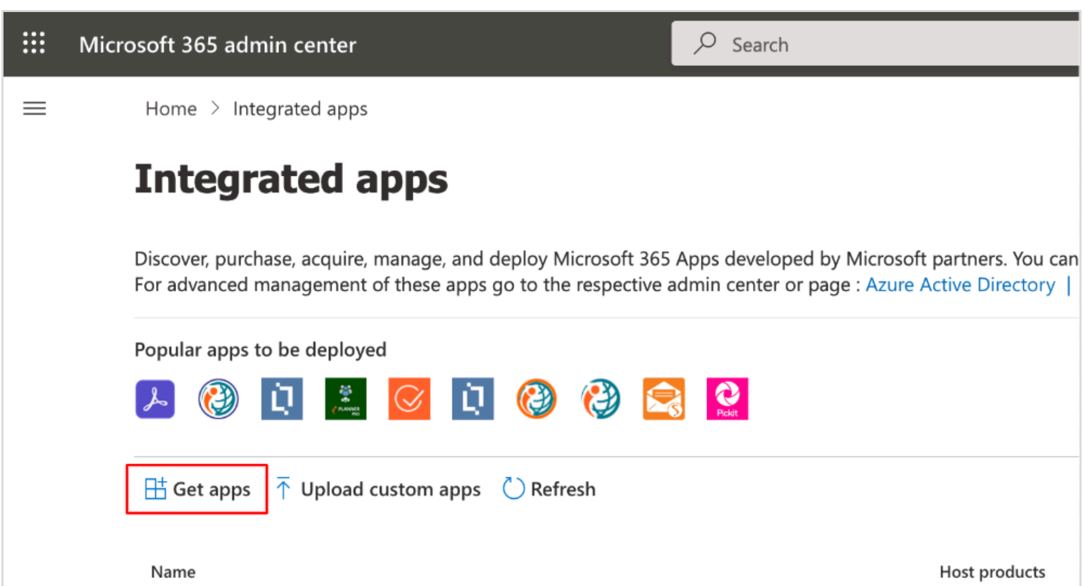
If you are an Office 365 admin, we recommend that you centralize the deployment of the app rather than have users complete individual installs. This method allows automated deployment to the correct users, including new users that join the organization.

Prerequisites:

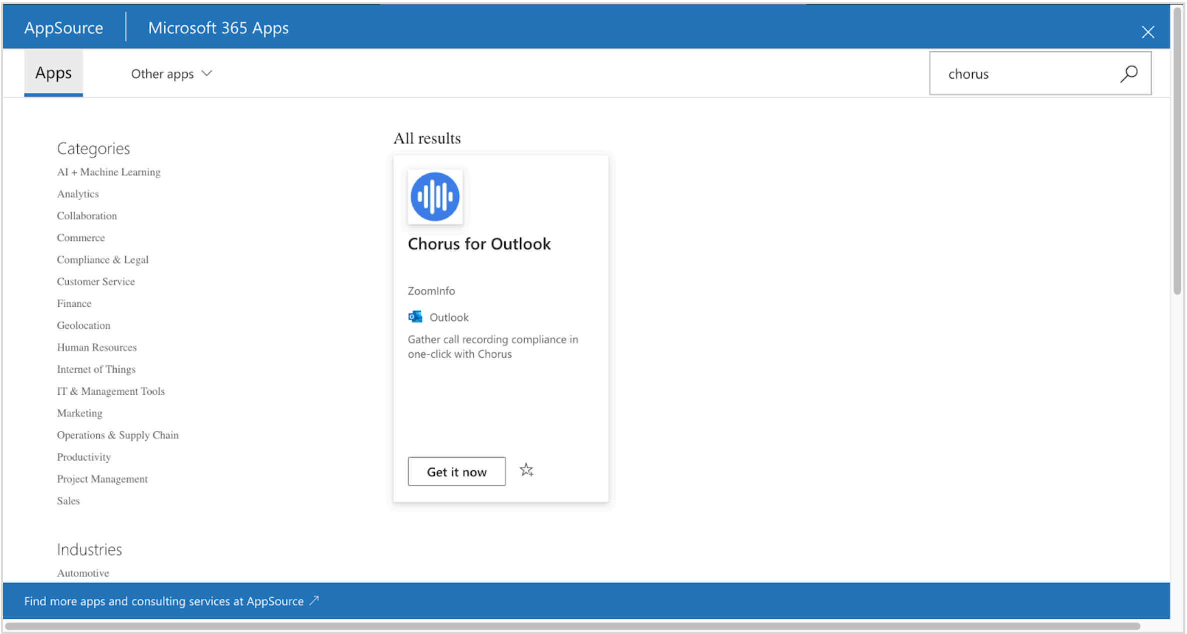
- Ensure that you've activated Compliance Mode
- You must have Microsoft 365 Admin privileges to perform this procedure

To install the Chorus Scheduler for Microsoft Outlook for your organization:

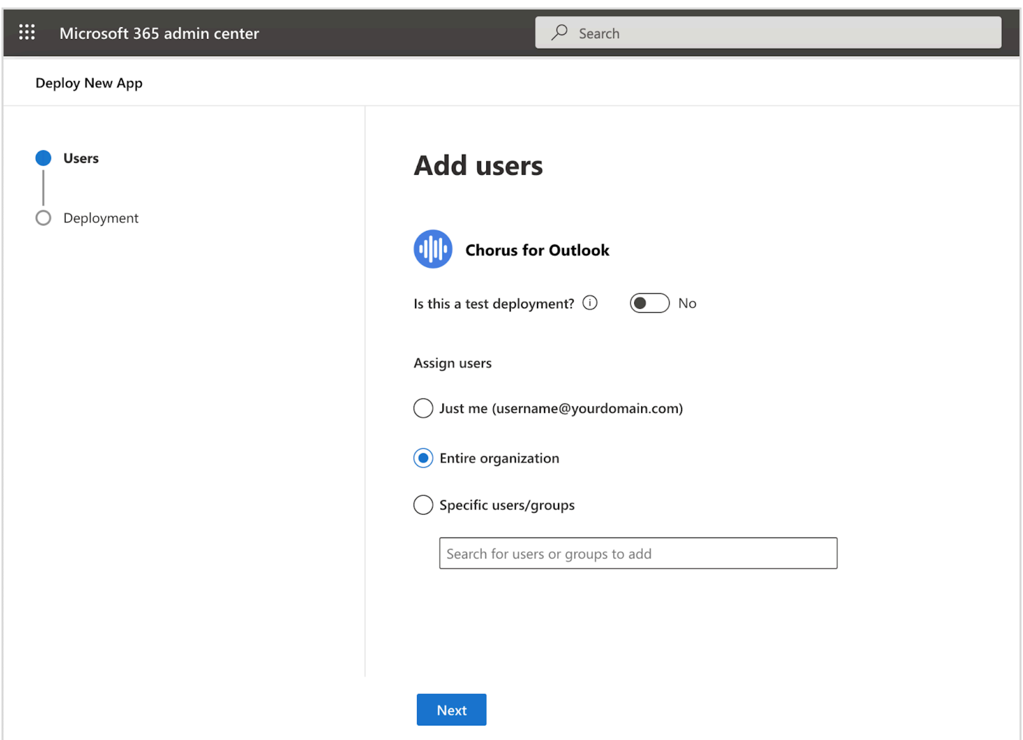
1. Log into the Microsoft 365 Admin Portal and navigate to **Settings > Integrated Apps > Get Apps**.



1. Search for "Chorus". You should see the **Chorus for Outlook** app (by ZoomInfo).



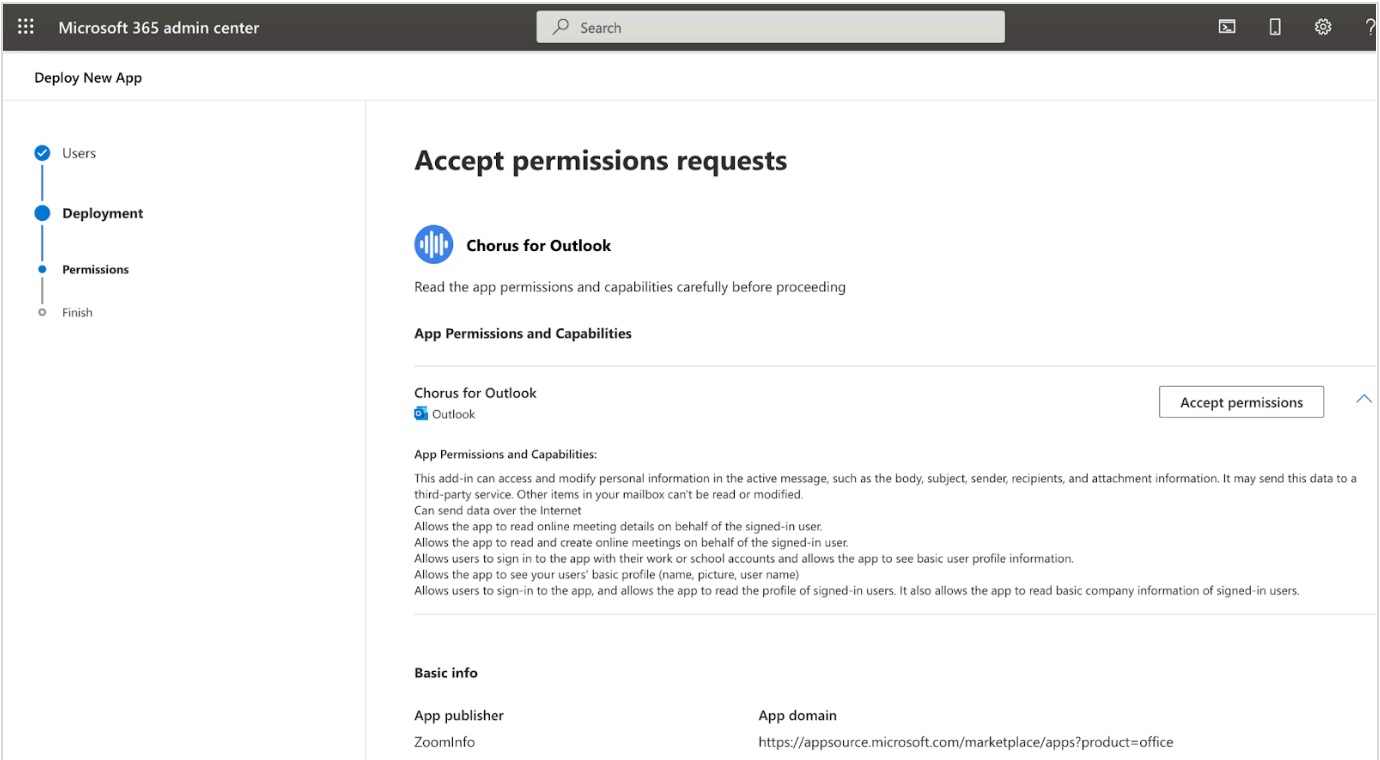
2. Click **Get it now**.



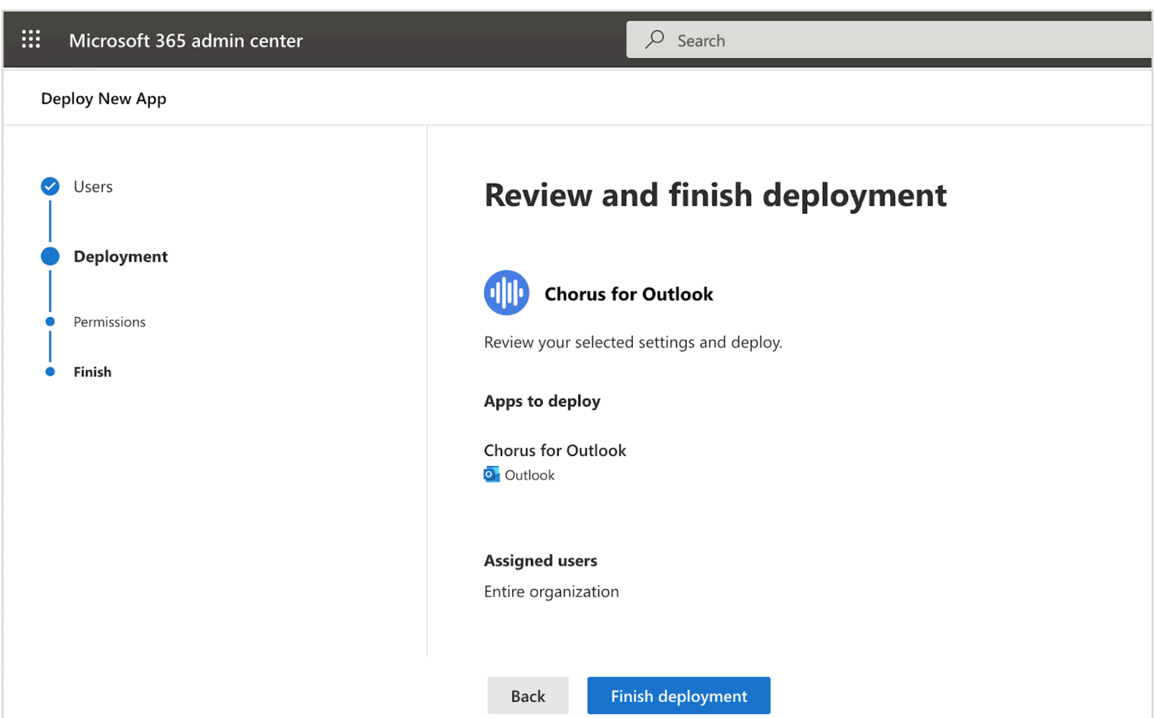
3. Select whether to enable the app for your entire organization, or add specific users.

   Note: To avoid maintenance over time, it is recommended to deploy to groups or your entire organization, rather than specific users.

4. Click **Next**.

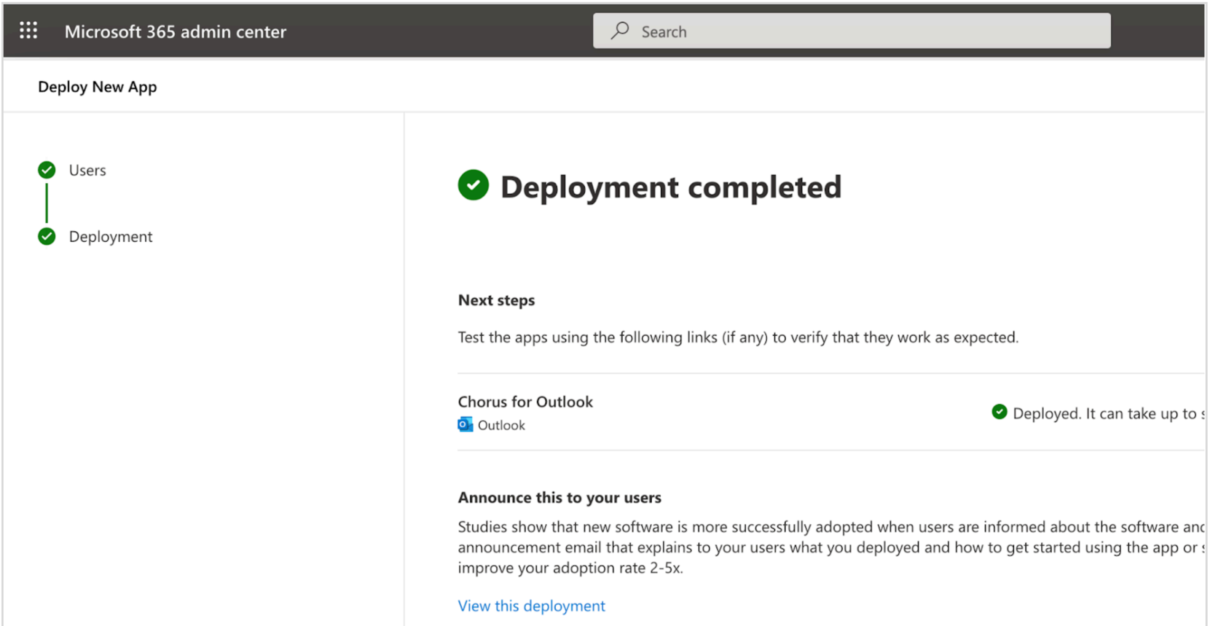


5. Review the requested permissions, and click **Accept Permissions**.
    a. You are prompted to select your Microsoft login.
    b. Accept the requested permissions on behalf of your organization, and click **Next** to proceed.



6. Review and click **Finish Deployment**.

After the deployment completes, the app should show as being deployed successfully.



It may take several hours for Chorus to appear in the Outlook interface. The app will show up automatically in the Outlook interface for all applicable users.

Provide the following article to your organization users that describes [how to use the Chorus Scheduler for Microsoft Outlook].

Assign Compliance Mode to Specific Roles

In order to apply compliance for certain users but not others, use roles in Chorus with enforced compliance, and assign only to users that require it.

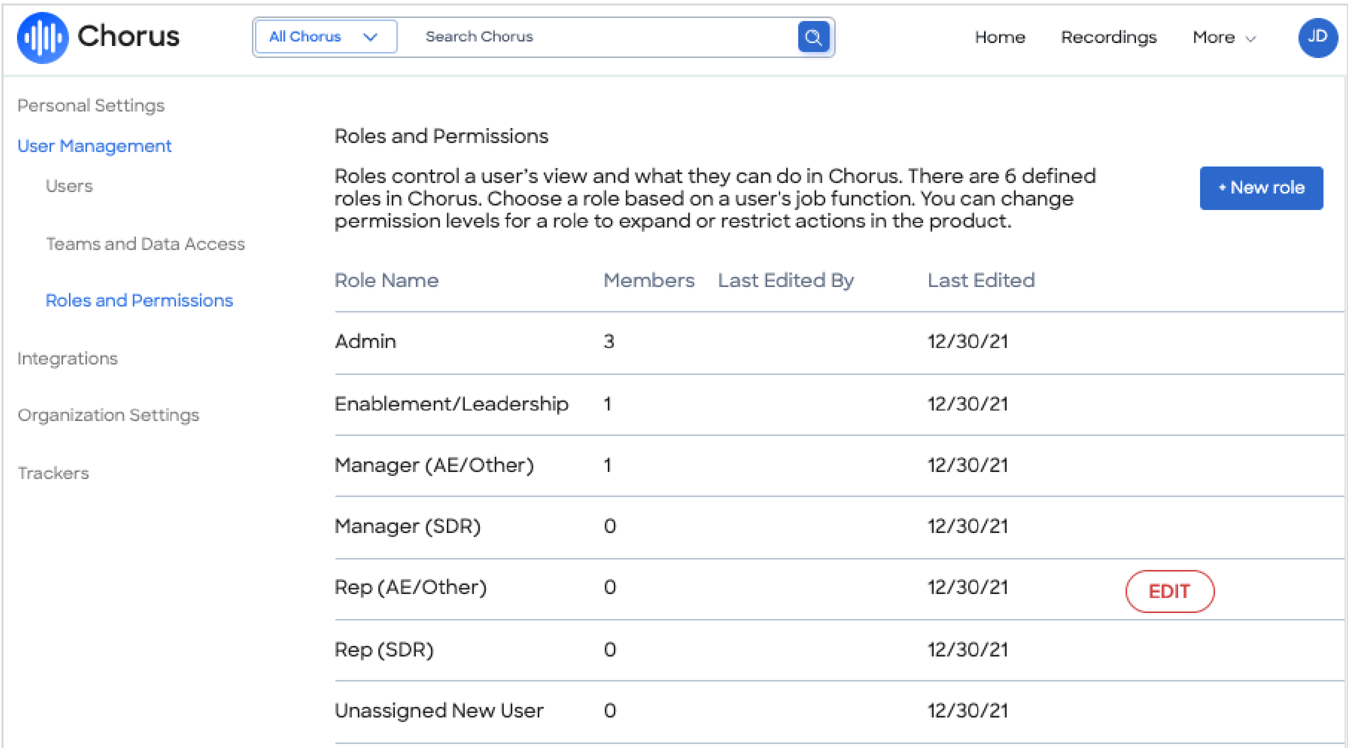
For each role, you have the option to set the Compliance Mode for associated users to **Enabled** or **Enforced**.

- **Enabled**: This is the default option once Compliance Mode is activated.
  - Meeting hosts have the option to generate a Go-Link with the Chorus Scheduler.
  - Meetings without a Go-Link will still be recorded in accordance with the established Recording Settings.
- **Enforced**: Enforcing compliance means that Chorus will ONLY record meetings scheduled with the Scheduler with a Go-Link detected.
  - Meeting hosts have the option to generate a Go-Link with the Chorus Scheduler.
  - Meetings without a Go-Link will not be recorded.
  - Enforcing compliance overrides any other Recording Settings.

- Selecting **Enforced** will maximize compliance, but we recommend to do so only after training and communication to the team. Changing this setting to **Enforced** without prior training may result in a large number of meetings not being recorded.

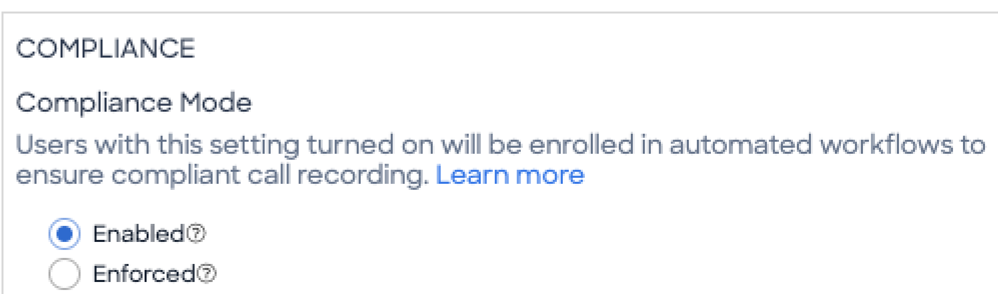
To configure compliance by role:

1. Navigate to **User Management > Roles and Permissions**.



2. Select a role and click **Edit**.

3. Scroll to the **Compliance** section.



4. Choose the appropriate Compliance Mode (**Enabled** or **Enforced**) for the role.

5. Repeat for other roles in your organization.

Setting Up Trackers

Trackers can help your organization gather insights at scale on topics discussed across conversations using keywords and phrases. With trackers, Chorus users can leverage the benefits of trackers, including:

- Jumping to key conversation moments (e.g. pricing) to review calls in minutes.
- Tracking key phrases and topics mentioned within conversations to ensure your team is following your process or methodology.
- Understanding changes in market dynamics impacting your unique industry. Set up custom trackers to analyze macro-level trends and your unique competitors.

When setting up trackers:

- As an admin, you can set up and manage trackers, or enable the option for users to create trackers.
- You can define **Basic** trackers (using keywords and phrases) or **Advanced** trackers (using Boolean logic syntax)
- Chorus has 50+ pre-built trackers to provide a common starting point for configuring your own

For a detailed discussion of how to configure and manage Trackers, see How to Create Trackers in Chorus.

Setting Up Meeting-Based CRM Updates

Meeting-Based CRM Updates is an AI-assisted capability that enables Chorus to analyze discovery and qualification calls and generate suggested values for sales methodology fields — MEDDIC, MEDDPICC, BANT, or SPIN — for writeback to your CRM. After a recorded meeting, reps trigger an AI analysis that reviews the transcript and the associated opportunity record, then presents suggested field updates with current versus suggested values side-by-side. Reps review the suggestions, make edits as needed, and approve updates that write directly to CRM opportunity fields.

Admin Setup (One-Time Configuration)

Before reps can use Sales Framework Extraction, an administrator must configure the feature.

1. Navigate to **Settings > CRM Automation Rules > Deal Qualification Mapping**.
2. Select a **framework template**: MEDDIC, MEDDPICC, BANT, or SPIN.
3. Map each framework field to the corresponding **CRM opportunity field**.
4. Specify the **write-back behavior** for each field:
    - **Overwrite** — Replaces any existing CRM field value with the AI-extracted value.
    - **Append** — Adds the AI-extracted value alongside any existing content in the field.
5. Click **Save** to enable the feature organization-wide.

Note: This configuration is required before end users can access the feature. Available across all Chorus packages.

End User Workflow (After Each Call)

Once an administrator has completed setup, reps can trigger framework extraction after any recorded discovery or qualification meeting. Once a recording is available in Chorus, follow these steps to review and apply AI-suggested CRM updates:

1. Complete a Chorus-recorded discovery or qualification meeting.
2. Navigate to the meeting page in Chorus and click **Check for CRM Updates**.
    - Alternatively, trigger the update directly from the **Slack meeting recap notification** without logging into Chorus.
3. Chorus analyzes the meeting transcript and the associated opportunity record, extracting framework values from the conversation.
4. Review AI-generated suggestions in the **preview modal**. The modal displays existing CRM field values alongside AI-recommended values for each framework component.
5. Edit any suggestions as needed.
6. Click **Approve Update** to write the changes to your CRM opportunity fields.

Tip: For best results, trigger CRM updates immediately after the call while conversation context is fresh. The Slack integration allows reps to complete this step without switching tools.

Supported CRM Integrations

Sales Framework Extraction supports writeback to **Salesforce**, **HubSpot**, and other supported CRM platforms. See the Chorus Integrations Guide for a full list of supported CRM integrations and configuration details.