

Integrate Magic Moment Playbook with Zoom

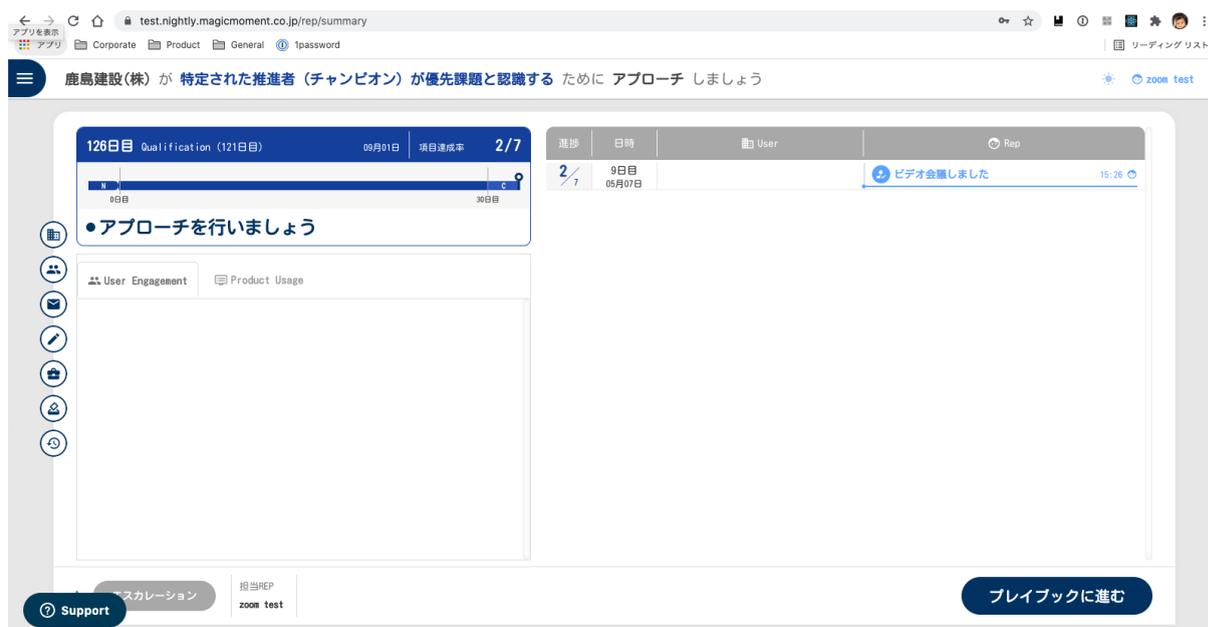
1. Login to your Magic Moment Playbook Account and navigate to the Personal Settings as “個人設定”.
2. Click Mail and Calendar Integration as “メール・カレンダー連携”.
3. Navigate to Zoom section, and Google Workspace section from part of “連携先を選択”



4. Please authorize Google Workspace, and Zoom.
5. Your Integration has completed.

Usage

1. First, access “/rep/summary”, and click “プレイブックに進む” button.



2. Then, you can see a playbook, and input data about deals.

The screenshot shows a web application interface for a 'Playbook'. The top navigation bar includes a menu icon, the company name '鹿島建設 (株)', and a subtitle '特定された推進者 (チャンピオン) が優先課題と認識する ために アプローチ しましょう'. The main content area is titled 'Playbook: Playbook 導入を決定する' and shows a list of tasks. The first task is '初回キックオフMTG日の設定' with a due date of '0000/00/00' and a time of '00:00'. The second task is '資料を作成する' with a due date of '0000/00/00' and a time of '00:00'. The third task is '作成した資料を確認する' with a due date of '0000/00/00' and a time of '00:00'. The fourth task is '商談準備を確認する' with a due date of '0000/00/00' and a time of '00:00'. The fifth task is '商談準備を確認する' with a due date of '0000/00/00' and a time of '00:00'. A 'ビデオ会議の設定' button is visible at the bottom right.

3. You can find an input about an appointment (Search “アポイントメントを打診し日程調整をする”). When you fill in these inputs, “ビデオ会議の設定” button will be showed.

The screenshot shows a web application interface for a 'Playbook'. The top navigation bar includes a menu icon, the company name '見積もりなしリサイクル', and a subtitle 'MMを信用し課題が明確になる! ために アプローチ しましょう'. The main content area is titled 'Playbook: Playbook MMを信用し課題が明確になる!' and shows a list of tasks. The first task is 'アポイントメントを打診し日程調整をする' with a due date of '2021/09/01' and a time of '18:00 ~ 19:00'. The second task is '提案書を作成する' with a due date of '0000/00/00' and a time of '00:00'. The third task is '作成した資料を確認し、必要に応じて連絡する' with a due date of '0000/00/00' and a time of '00:00'. The fourth task is '商談準備の最終確認' with a due date of '0000/00/00' and a time of '00:00'. A 'ビデオ会議の設定' button is visible at the bottom right.

4. Click “ビデオ会議の設定” button, and you can set attendees, select meeting tools (Google Meet or Zoom). If you select Zoom, you can publish a Zoom Meeting Link

automatically, and the link will be pushed in google calendar events.

The screenshot shows the Magic Moment Playbook interface. The main content area displays a task list under the heading "アポイント取得の判断" (Appointment Acquisition Judgment). The tasks include:

- 必須 アポイントメントを打診し日程調整をする (Required: Make an appointment and adjust the schedule)
- 必須 提案書を作成する (Required: Create a proposal)
- 作成した資料を確認し、必要に応じて連絡する (Check the created materials and contact as needed)
- 必須 商談準備の最終確認 (Required: Final confirmation of sales preparation)

A modal window titled "ビデオ会議の設定" (Video Meeting Settings) is open, showing the following details:

- タイトル: ビデオ会議: 見積もりなしリサイクル (Title: Video Meeting: No Estimate Recycle)
- Repの招待: Select ... (Rep Invitation: Select ...)
- ビデオ会議: Google Meet (Video Meeting: Google Meet)
- Zoom: https://meet.google.com/sem-ta.jp-tuu (Zoom: https://meet.google.com/sem-ta.jp-tuu)
- ダイヤルイン: +81 3-4545-0450 (Dial In: +81 3-4545-0450)
- PIN: 7034510960800 (PIN: 7034510960800)

The interface also shows a sidebar with navigation options like "Nurturing", "Qualification", "Closing", "Onboarding", "Adoption", and "Expansion". The top navigation bar includes "見積もりなしリサイクル" (No Estimate Recycle) and "MMを信用し課題が明確になる!" (Trust MM, tasks become clear!).

Disconnecting Magic Moment Playbook from Zoom

1. Login to your Magic Moment Playbook Account and navigate to the Personal Settings as “個人設定”.
2. Click Mail and Calendar Integration as “メール・カレンダー連携”.
3. Navigate to Zoom section and click Disconnect as “連携解除”.
4. Click OK on the alert dialog.
5. Your disconnection has completed.