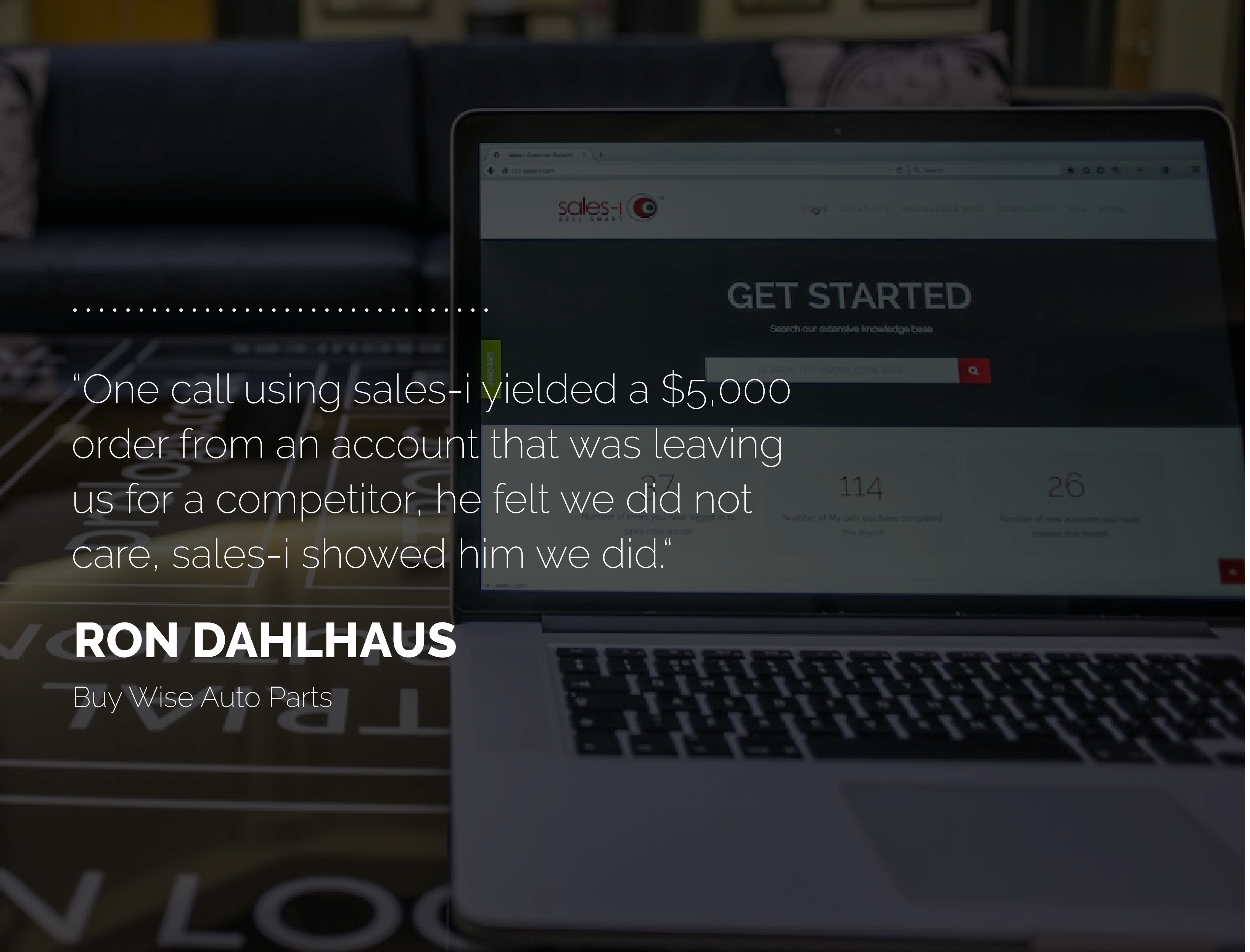
sales-i
SELL SMART

THE PERFECT iOS MYCALLS ROUTINE

Whether one-to-one or over the phone, your calls are where the deal is won or lost. This guide shows you how MyCalls can make calls more successful and easier to manage.



"One call using sales-i yielded a $5,000 order from an account that was leaving us for a competitor, he felt we did not care, sales-i showed him we did."

RON DAHLHAUS

Buy Wise Auto Parts

WHAT IS MYCALLS?

sales-i is made up of various features and areas, each of which is there to make your life easier and more profitable in one way or another. The area that this guide will focus on is MyCalls - a diary system which makes it quick and simple to record which calls you've got lined up, what you'll need to talk about in each call and, once you've actioned a call, what the next steps are. MyCalls isn't complicated or fancy, it's just a simple, straightforward area of the system which, used correctly, will make your job as a salesperson much, much easier.

Sell smart, every day

You probably don't realize it, but there are easy-to-close sales opportunities sitting right there in your back office system.

By analyzing your data, sales-i can find those opportunities and put them directly in front of you and your sales team.

Regardless of whether you're out selling in the field, based in the office or a mixture of the two, sales-i gives real purpose to every call or meeting.

Your entire sales team gets the information they need to make them 100% effective every day, meaning there's no need for milk-round calls any more.

OK, I'M SOLD.
WHERE DO I FIND MYCALLS?

Step 1)

From your iPhone or iPad, head over to the App Store..

Step 2)

In the search bar, enter sales-i. Once you've found the app in the results, simply tap 'Get' to start the download.

Step 3)

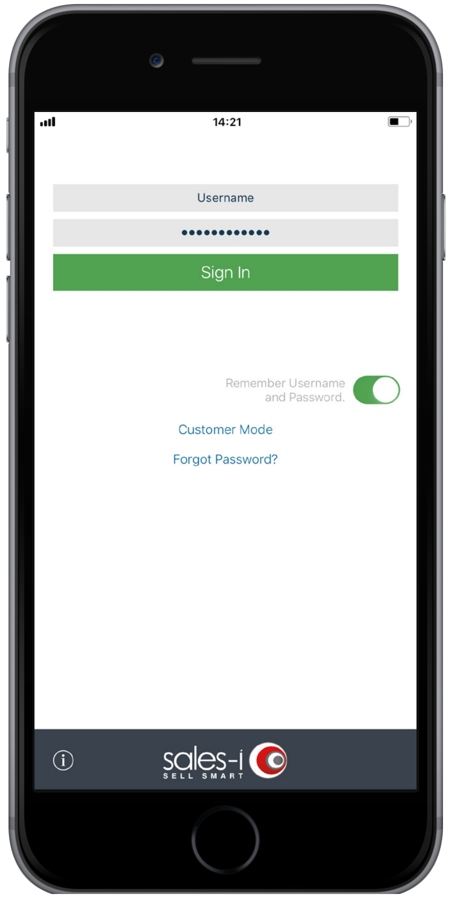
Once downloaded, open the app and log in using your usual sales-i username and password.

THE LOGIN SCREEN

The screenshot to the right is the login screen.

From here, you can log into sales-i, recover your password and enable Customer Mode.

Customer Mode removes cost, margin and gross profit from sales-i enabling you to share information with your customer without divulging any sensitive information.



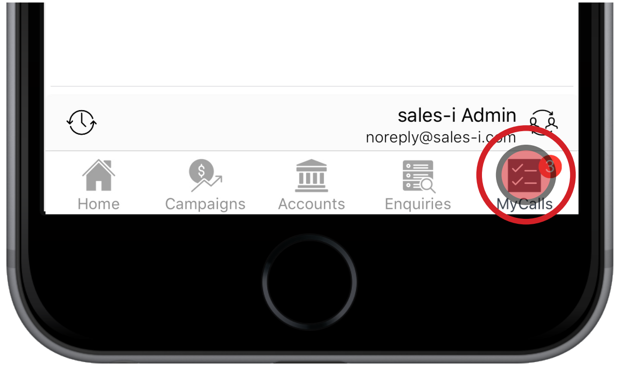
ADDING TASKS TO MYCALLS

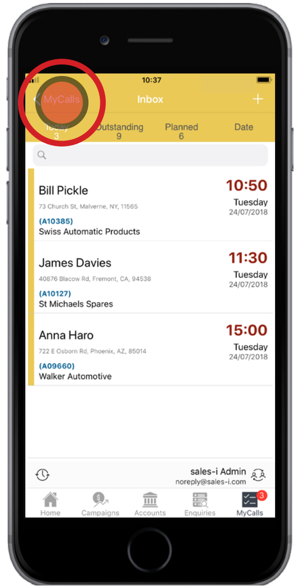
Typically, you'll enter a note into MyCalls when you've completed an activity and need to schedule a follow-up action. MyCalls then adds that task to a diary, so you'll know exactly where you need to be, when you need to be there and why.

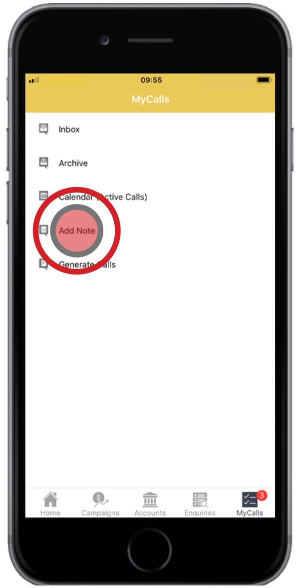
Always remember that the record card is the repository for any information you add about the customer. Regardless of where you enter a note, it will be stored in the record card.

Step 1

Log into sales-i and tap MyCalls in the bar at the bottom.





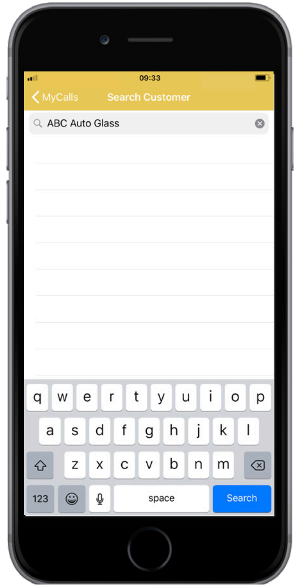


Step 2

This is your MyCalls inbox, which lists your future and past tasks. Hit MyCalls in the top left corner

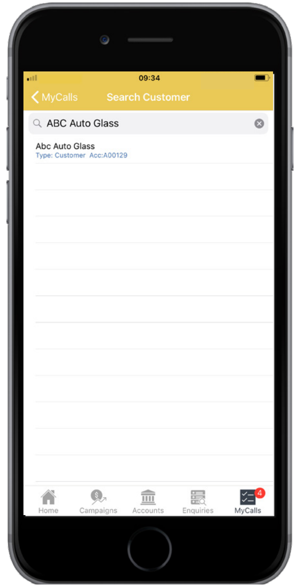
Step 3

Tap the 'Add Note' option from the menu.



Step 4

Tap the search bar and enter the account name you're looking for, then hit search.



Step 5

Find the account you want from the results and tap to open it.

Step 6

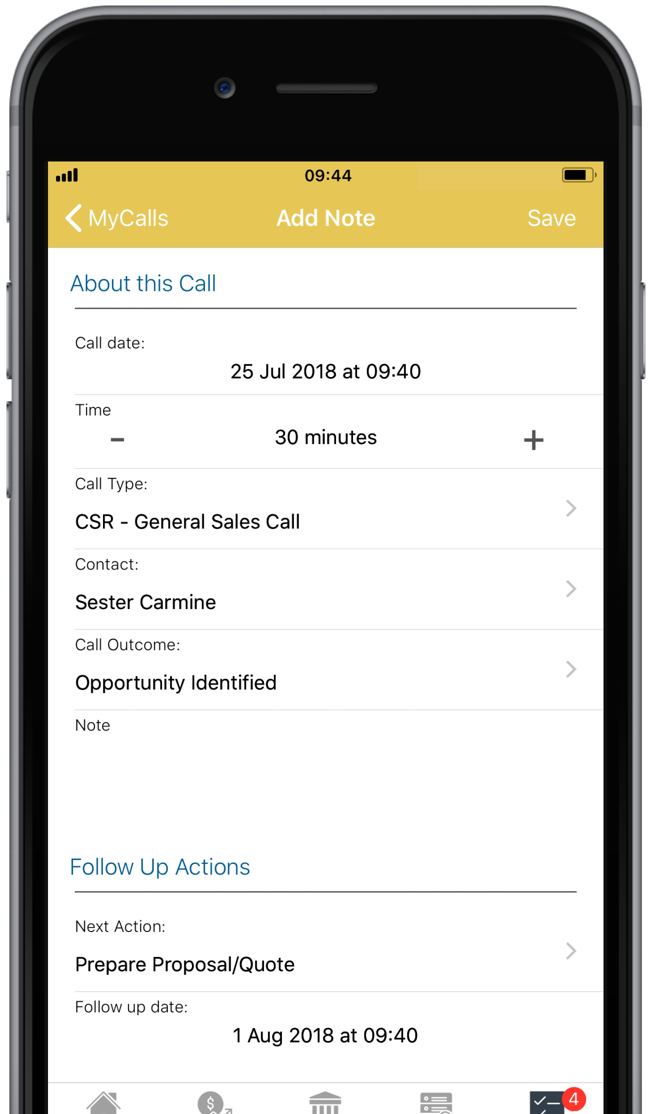
Add in everything on this page about your call.

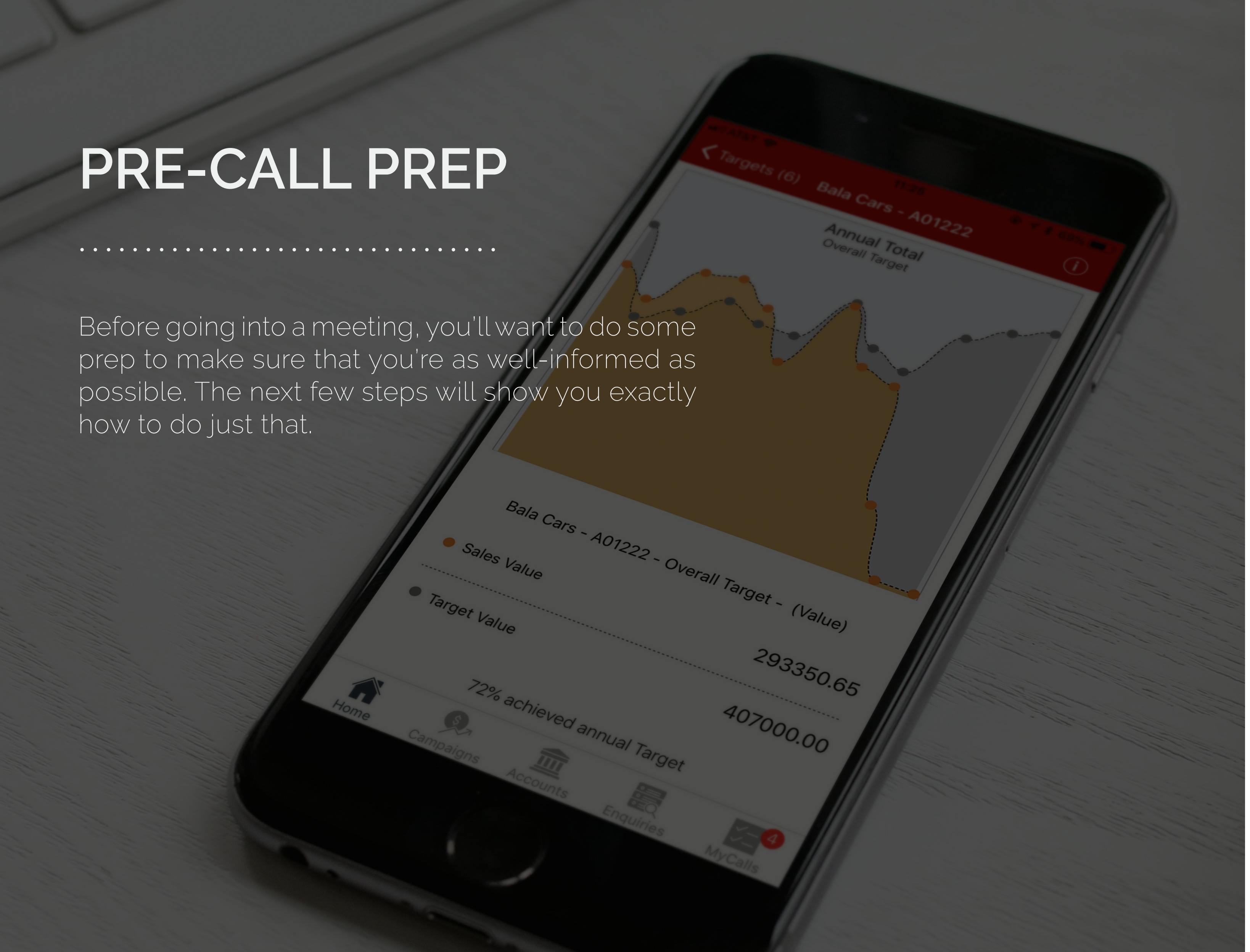
You may need to scroll down to find more sections.

Important: entering information into the About This Call section adds it as an old call; adding info into the Follow Up Actions section below (you'll need to scroll down) schedules a future call.

When you're done, just hit Save in the top right-hand corner.

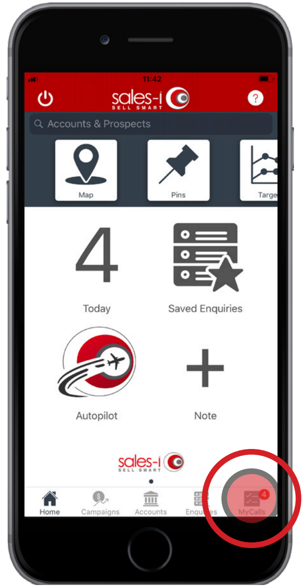
Your call will now be available in your Inbox, which can be accessed by tapping MyCalls in the bottom right-hand corner again.

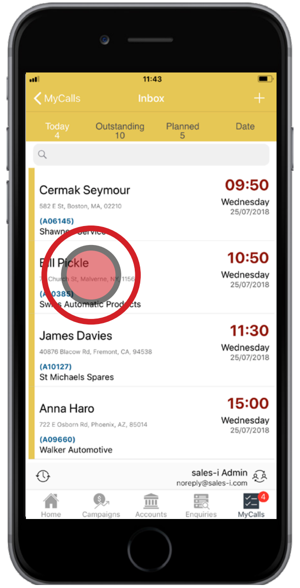


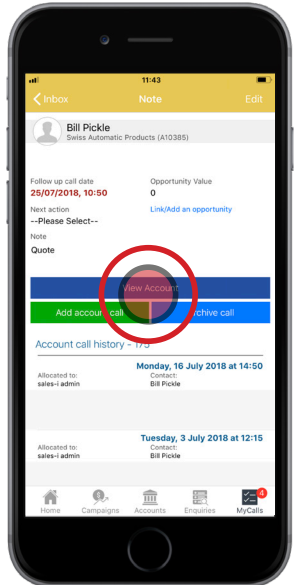


PRE-CALL PREP

Before going into a meeting, you'll want to do some prep to make sure that you're as well-informed as possible. The next few steps will show you exactly how to do just that.







Step 1

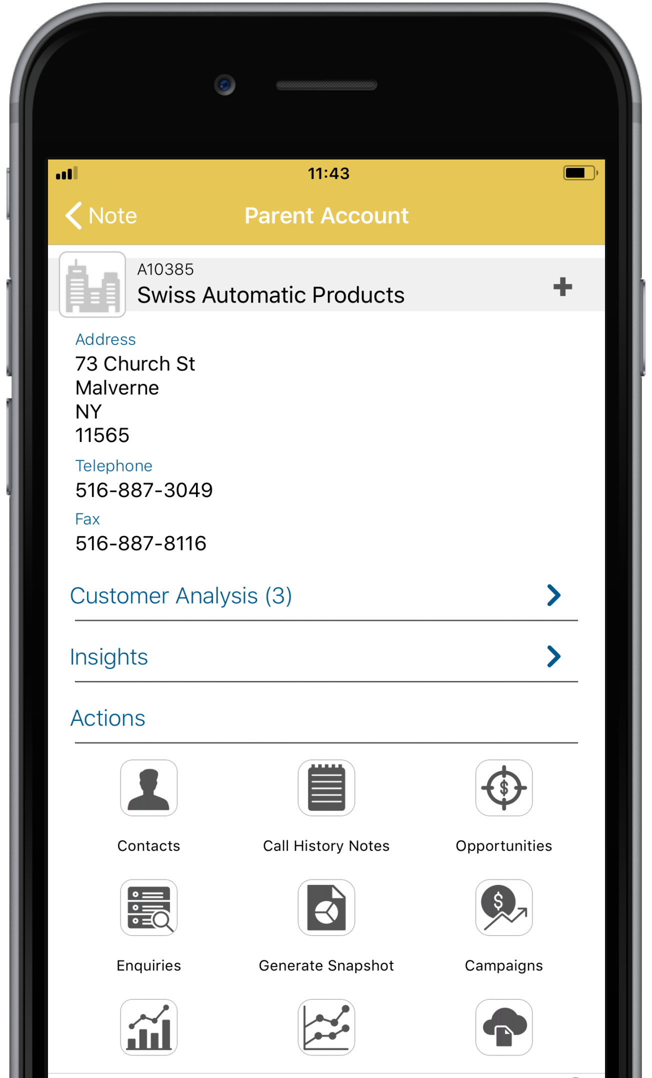
Tap MyCalls in the bottom right.

Step 2

From the list of calls, tap the one you're about to attend.

Step 3

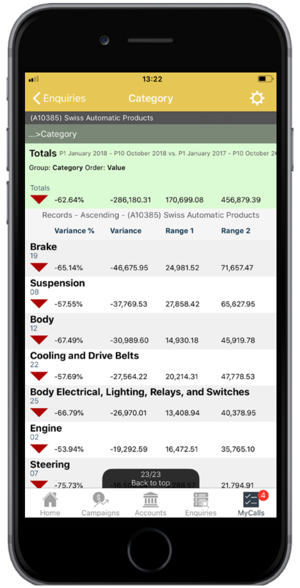
Make sure the date/time is right, then hit View Account.

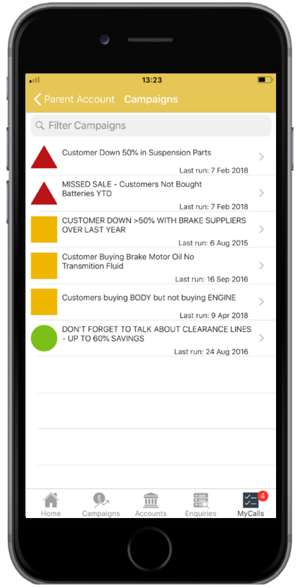


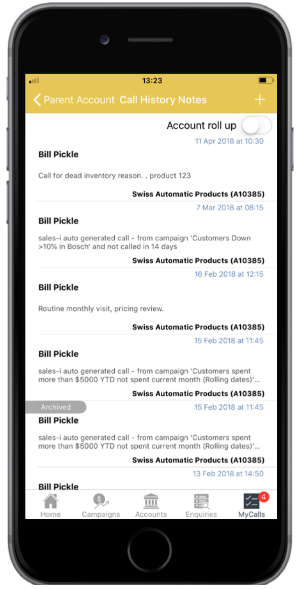
Step 4

Scroll down a little and you'll be able to find out everything you need on the customer you're about to call.

The prep you'll need to do will depend on who you're meeting, but there are a few things you'll probably find useful for every customer call.







1. Check Enquiries

Enquiries will allow you to take a look into the spending history of this customer and compare performance year on year.

2. Campaigns

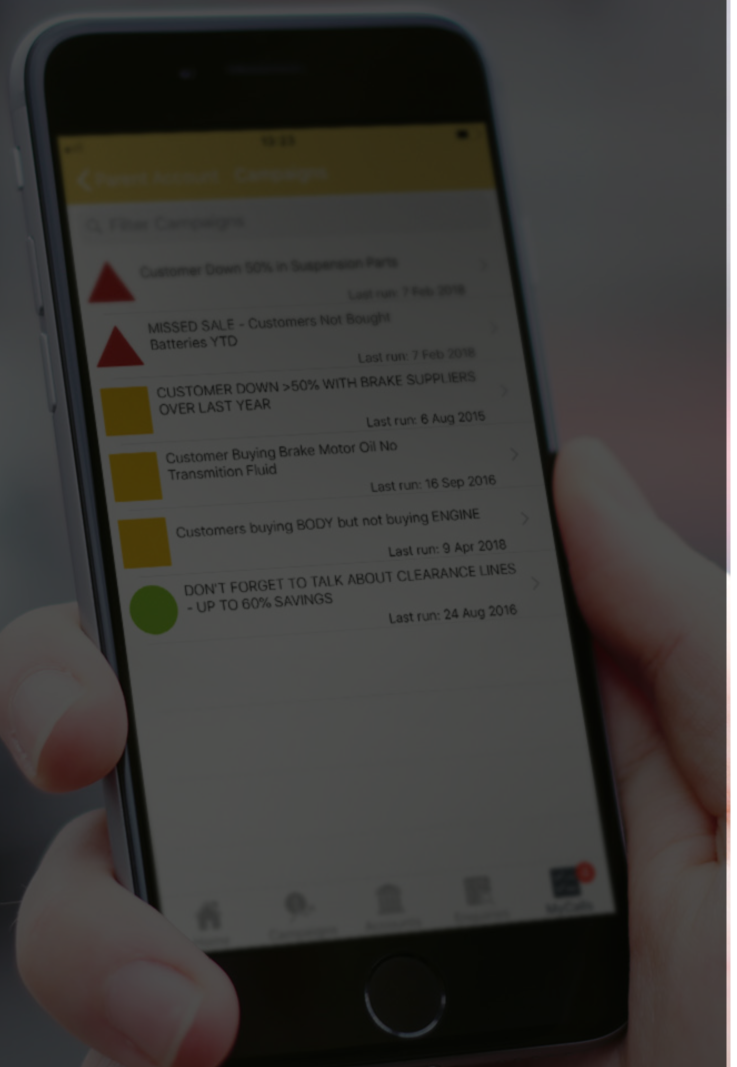
It's also a good idea to look at Campaigns, which will show if there are any opportunities being missed specific to the account.

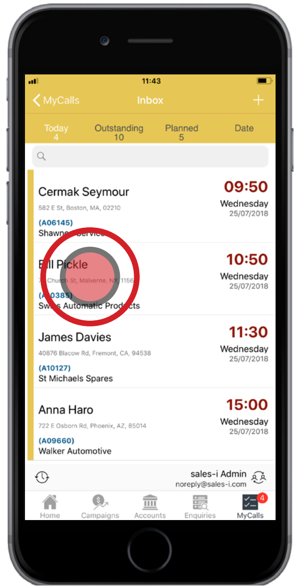
3. Call History Notes

Finally, we'd definitely recommend looking at Call History Notes to remind yourself of what was said and done in your previous calls.

POST-CALL WRAP UP

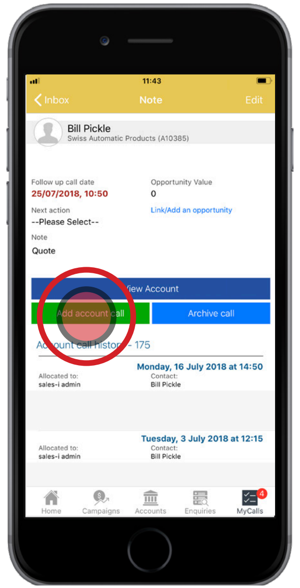
So the meeting's over. It's time to wrap the call up by entering a few notes into the system including what took place in your meeting and what needs to happen next.





Step 1

Go back into the sales-i app, into the MyCalls inbox and tap the call you've just completed.

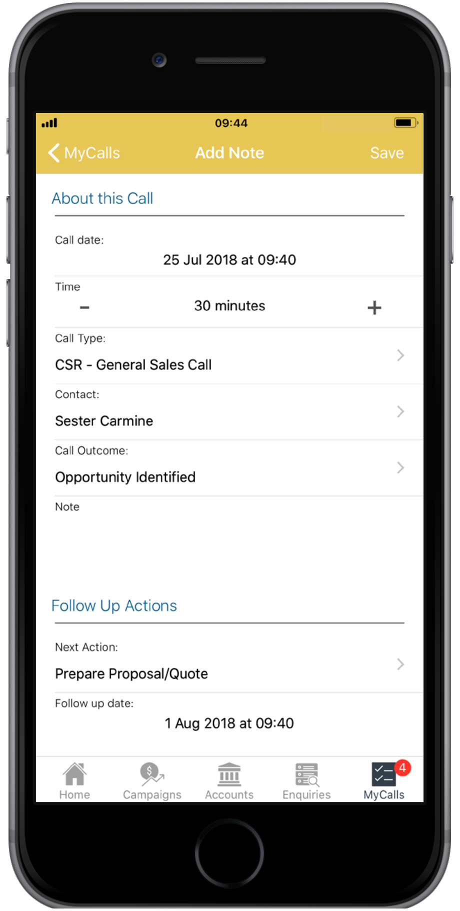


Step 2

Hit the green Add Account Call button.

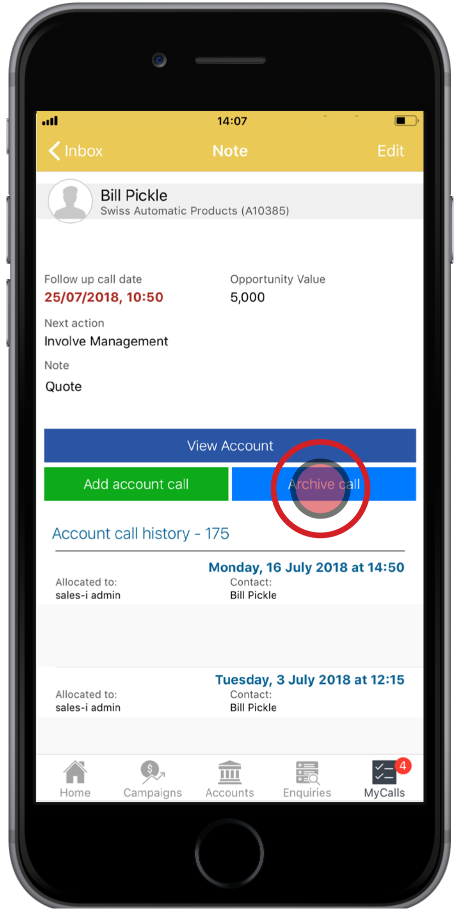
Step 3

Enter details of the call, and any Follow Up Actions that are needed. Then, tap Save.



Step 4

Finally, hit Archive Call to remove the call from your diary.



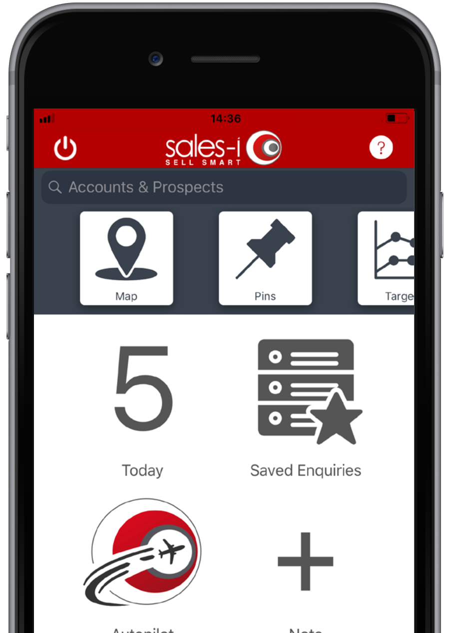
AUTOPILOT

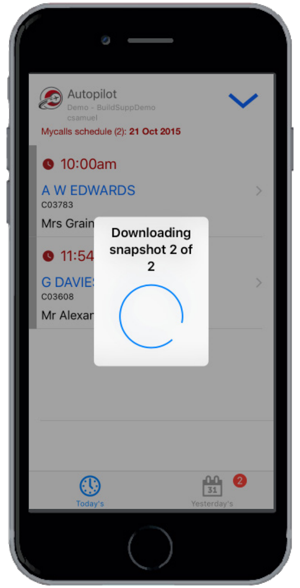
As soon as you have your notes entered for tomorrow, Autopilot can do a lot of work for you. The feature will intuitively create meeting prep for you overnight and then store everything offline. Just make sure your notes are entered for the next day and Autopilot can do the rest.

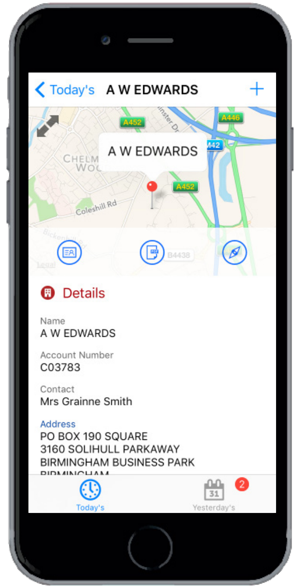
How to log in

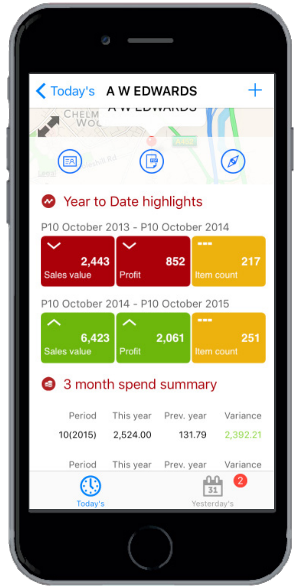
From the home screen of sales-i, you will see the Autopilot logo. Tap this to access the Autopilot feature of sales-i.

Note: if you get an error message stating that Auotpilot is not currently enabled, talk to your Power User about getting Autopilot set up on your account.









Instant Snapshots

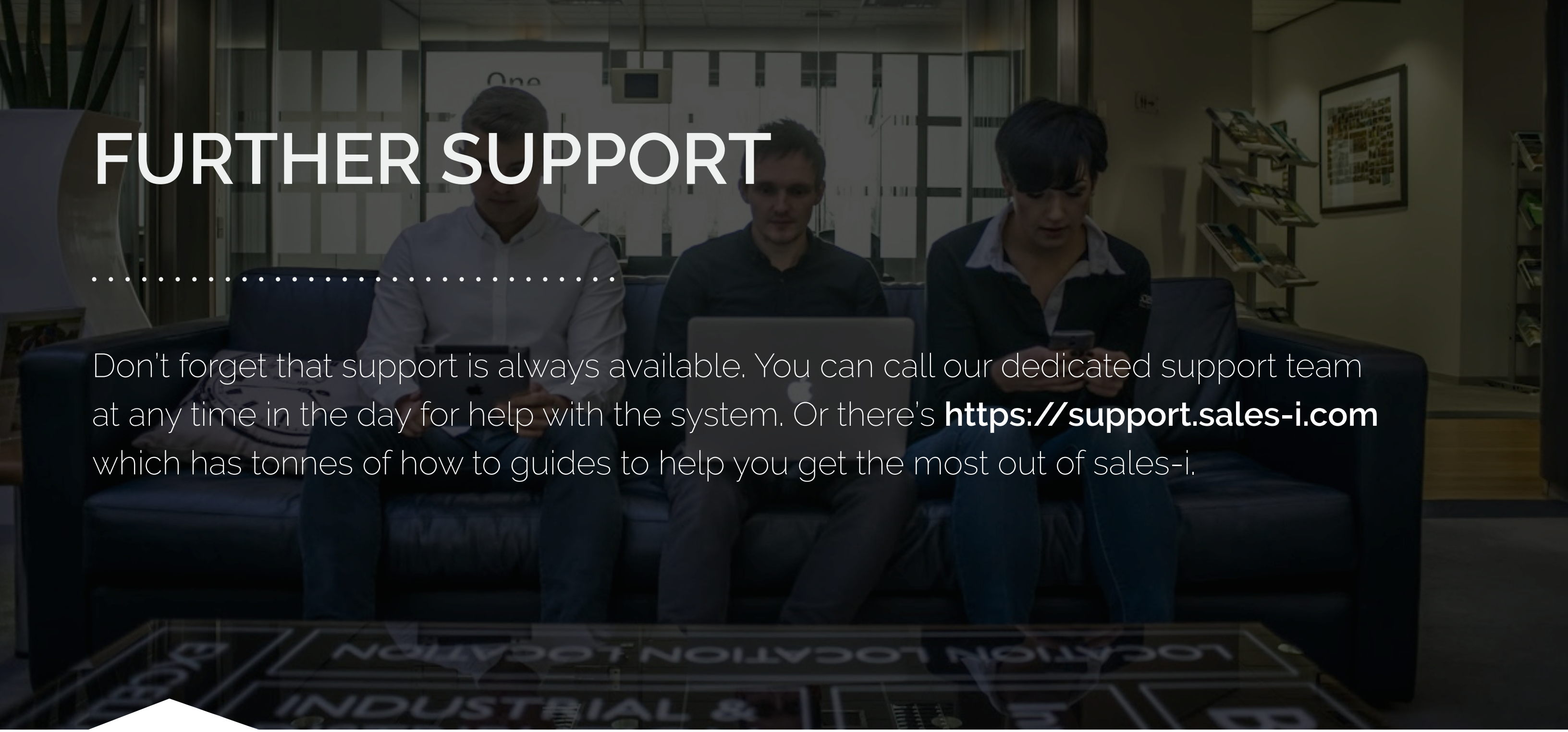
As soon as you sign in, sales-i will download the day's Snapshots for you.

Overview

By tapping on a call, you'll get all the info you need, including the meeting location on a map and the customer's personal details.

Details

Scrolling below the map will reveal even more info, including spend mix analysis, new opportunities and a 3 month spend summary.



FURTHER SUPPORT

Don't forget that support is always available. You can call our dedicated support team at any time in the day for help with the system. Or there's **https://support.sales-i.com** which has tonnes of how to guides to help you get the most out of sales-i.

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