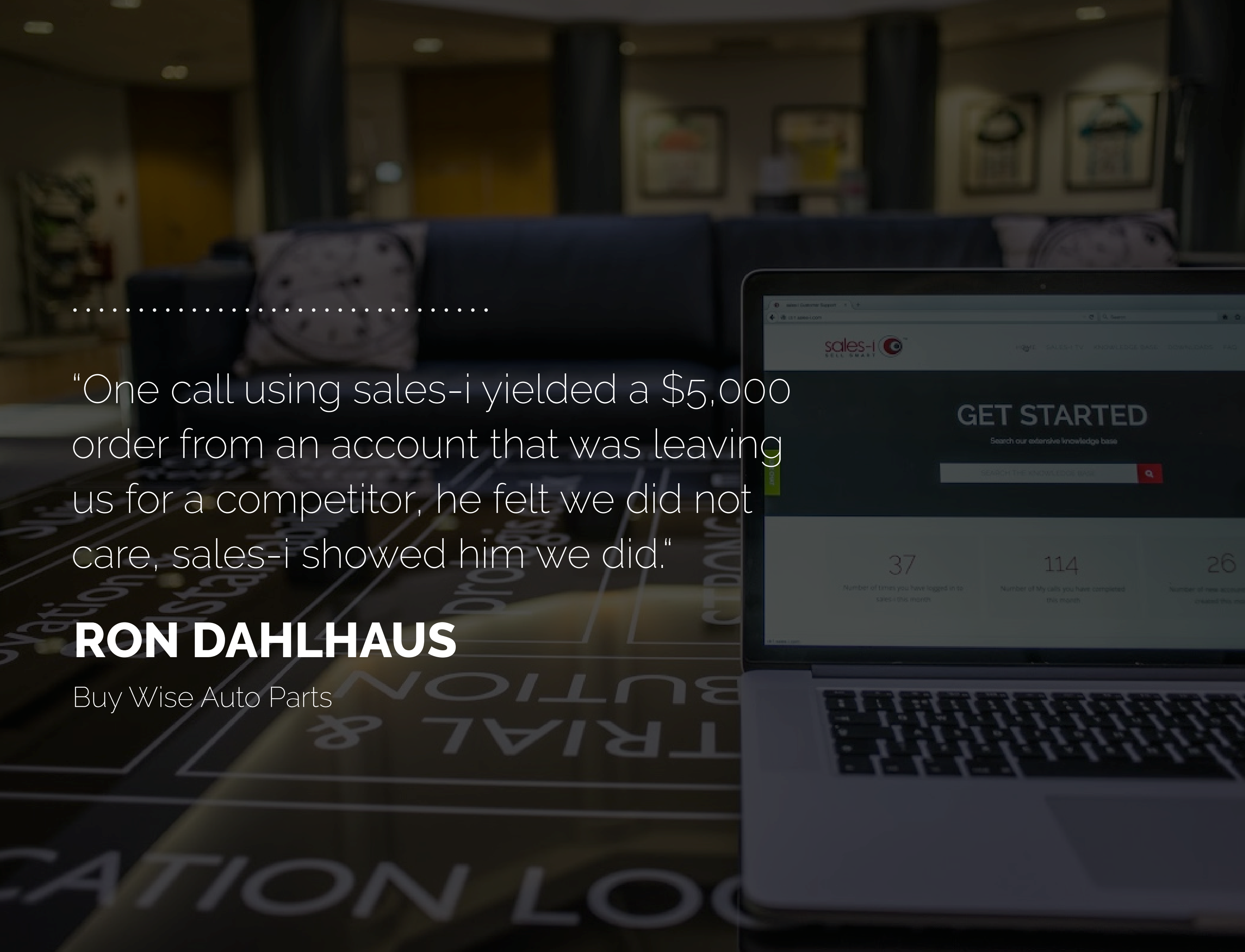
THE PERFECT ANDROID MYCALLS ROUTINE

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.

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)

Open the Google Play Store..

Step 2)

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

Step 3)

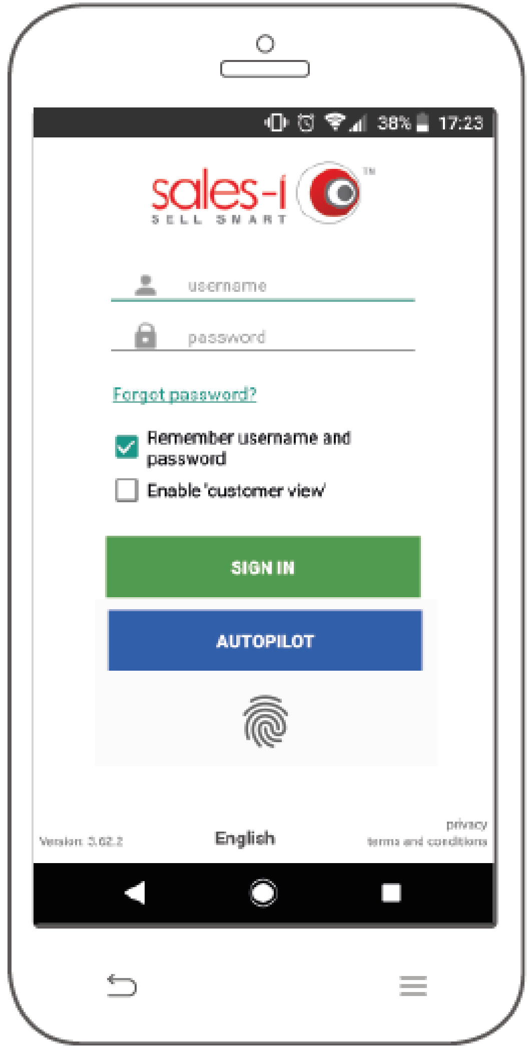
Open the app and log in using the sales-i username and password given to you already.

THE LOGIN SCREEN

The screenshot to the right is the login screen. From here - you guessed it - you can log into sales-i.

It's worth noting a couple of things here, though. Right in the middle of the screen is the forgotten password link; remember that in case you ever get stuck.

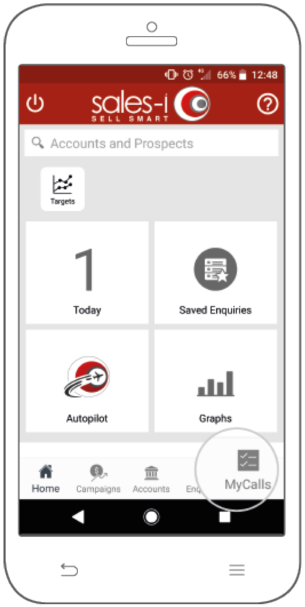
Secondly, there's the big blue button at the bottom of the screen. That allows you to access a really cool area of the app called Autopilot, but we'll come to that later on.

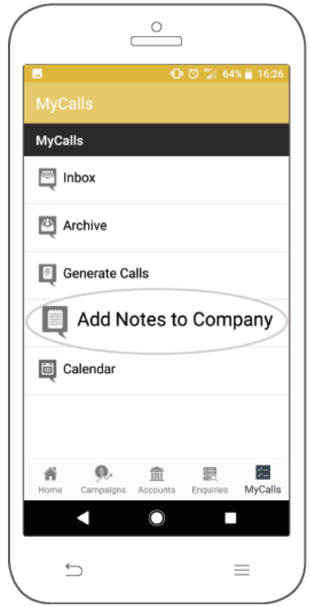


ADDING TASKS TO MYCALLS

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.



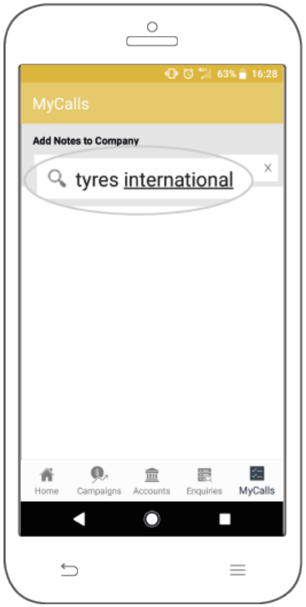


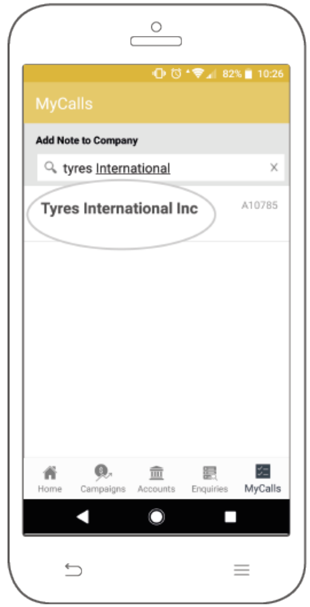
Step 1

From the home screen, tap MyCalls.

Step 2

From the menu that appears on screen, tap Add Note to Company.





Step 3

Tap the search bar and enter the name of the desired company. When you're done, tap enter.

Step 4

From the results, tap the company you're looking for.

Step 5

Add in everything on this page about your call.

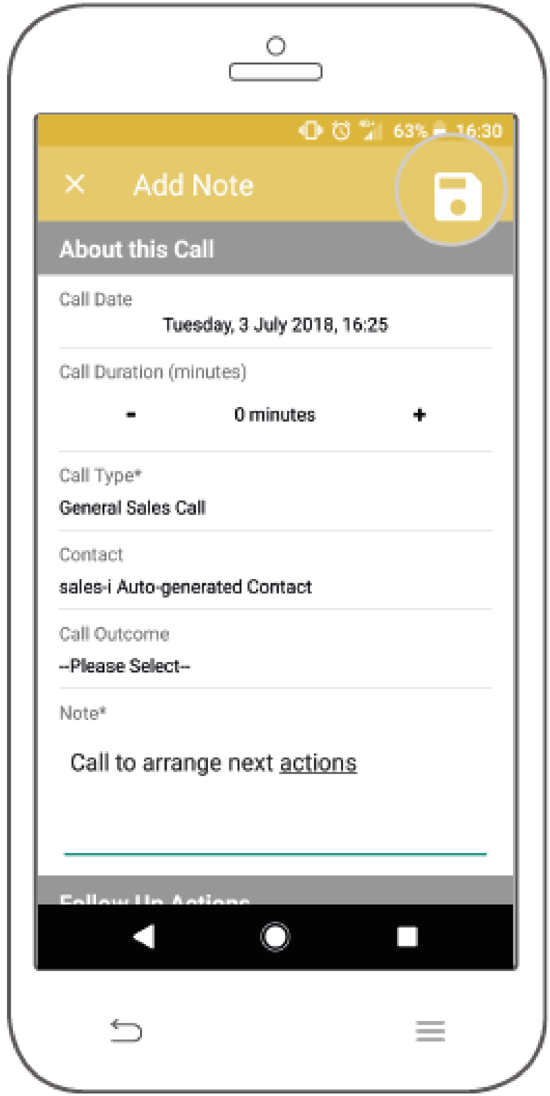
To add information to a section, simply tap it and enter the required info.

You may need to scroll down to find more sections.

Important: Ignore Call Date*. This is merely the date the call was created. If you're adding a call for the future, then enter everything under Use Follow-up Date.

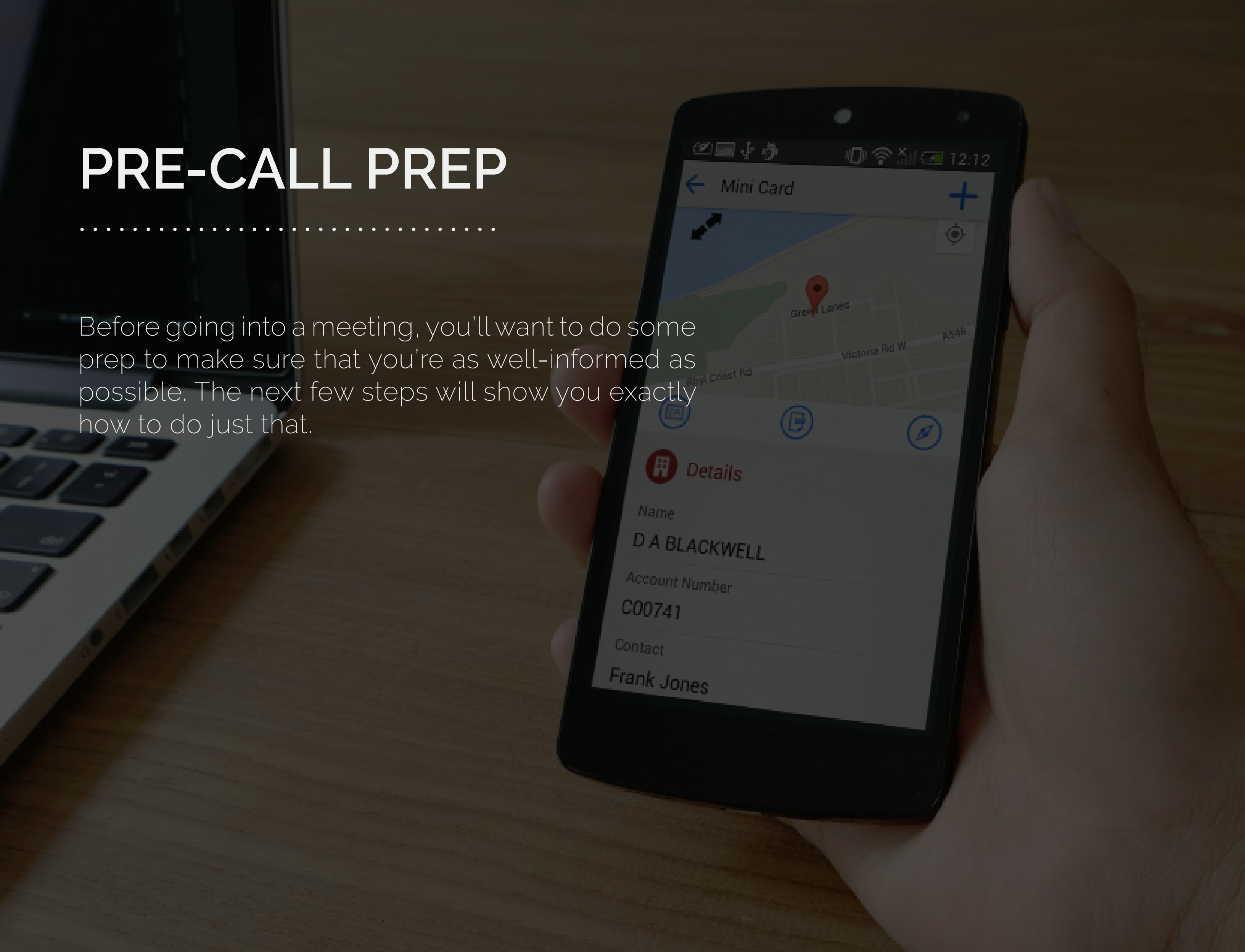
When you're done, just hit the save icon in the top right.

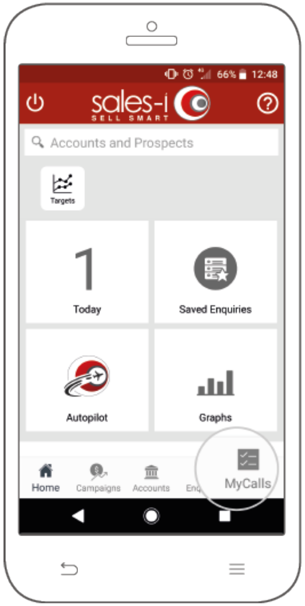
Your call will now be available in your Inbox, which can be accessed by tapping MyCalls in the top right-hand corner again.



PRE-CALL PREP

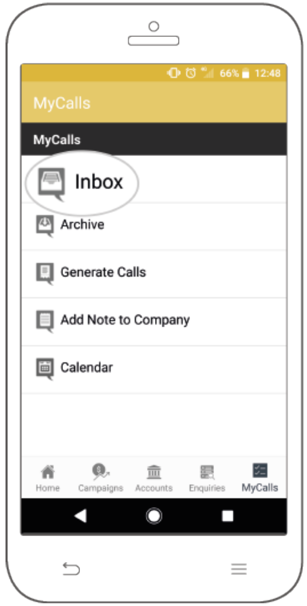
Before going into a meeting, you'll want to do some prep to make sure that you're as well-informed as possible. The next few steps will show you exactly how to do just that.





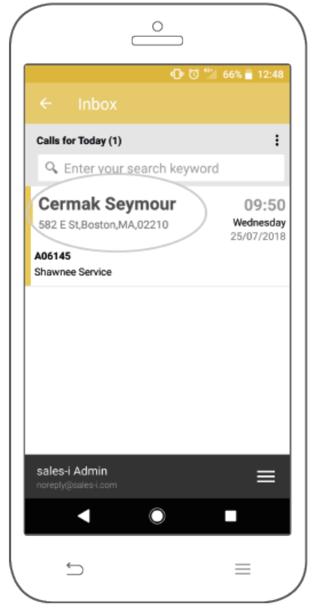
Step 1

Tap MyCalls in the bottom right.



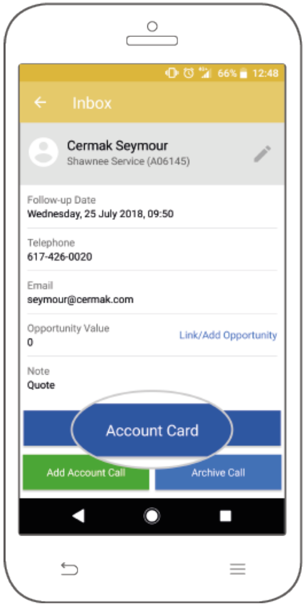
Step 2

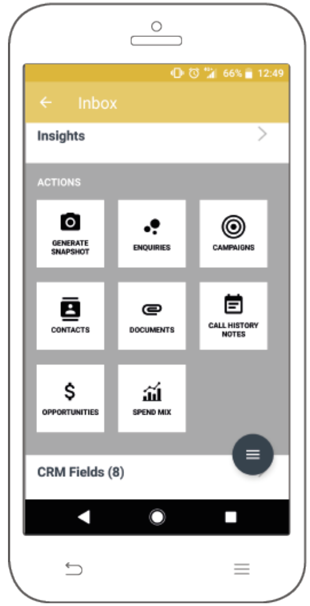
Open your MyCalls inbox.



Step 3

From the upcoming calls, tap the one you want to prepare for.



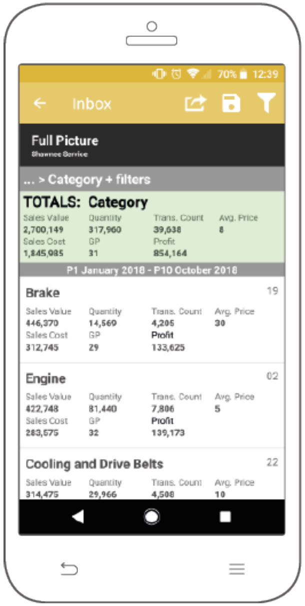


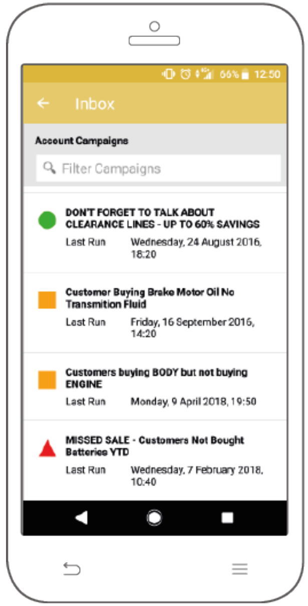
Step 4

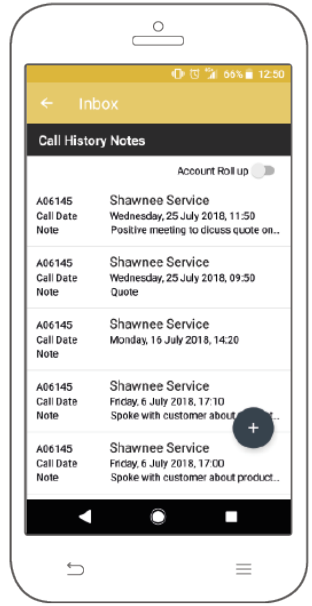
Now, tap Account Card.

Step 5

Scroll down and you should see some options. The prep you need to do will depend on the call, but there are 3 options to always use.







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

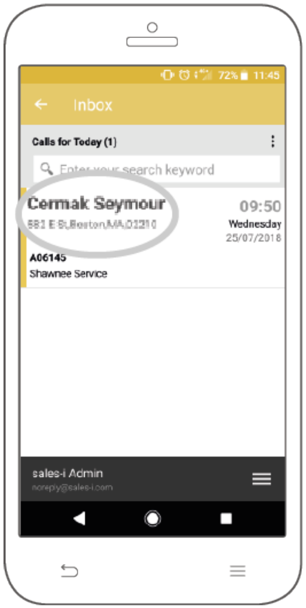
It's also a good idea to look at Campaigns, which will show if there are any opportunities being missed specific to the account.

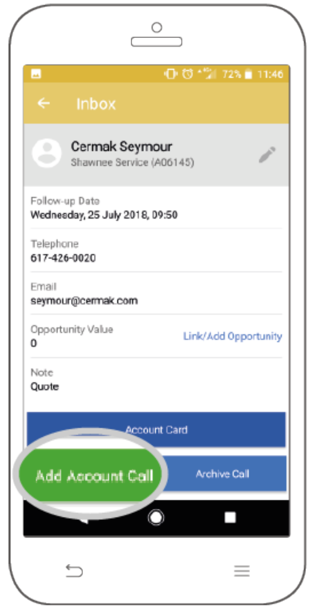
3. Call History Notes

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 just happened and what needs to happen next.





Step 1

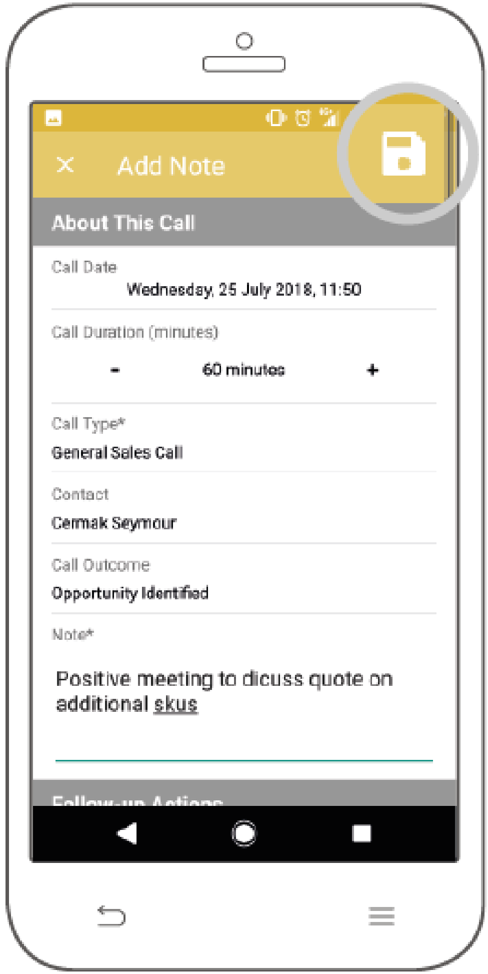
Go back into the MyCalls inbox and tap the call you've just completed.

Step 2

Hit the green Add Account Call. button

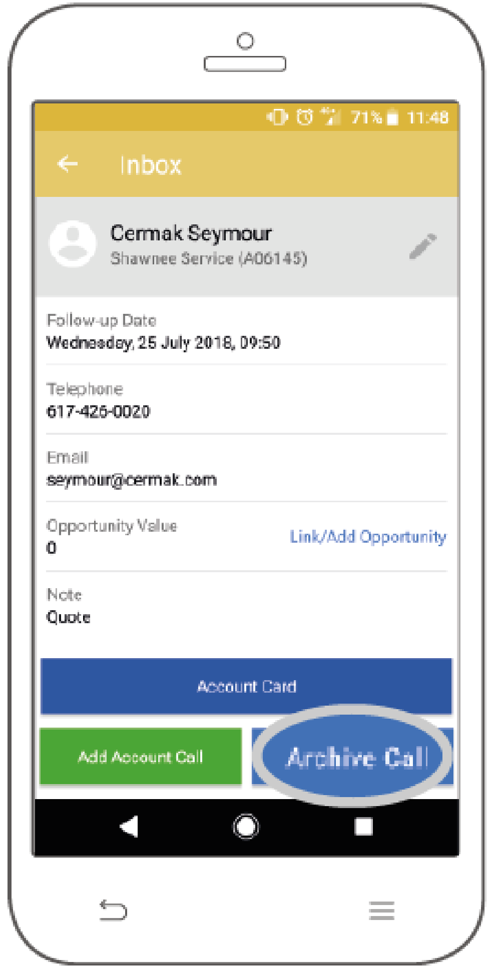
Step 3

Enter details of the call, and of any follow up actions that are needed. Then, tap the Save icon.



Step 4

Now, tap MyCalls to return to your diary, tap the call you've just actioned and hit the blue Archive Call button to remove the call from your diary.



AUTOPILOT

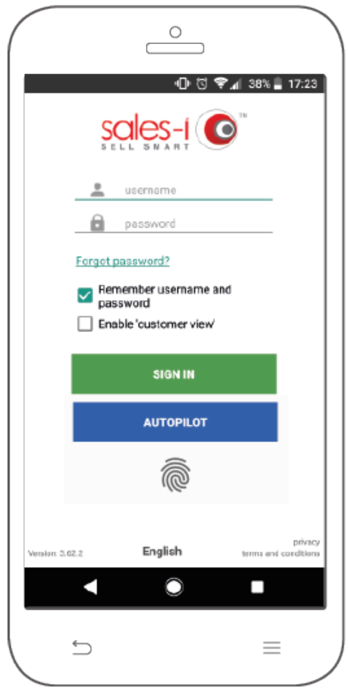
As long as you have calls entered for tomorrow, Autopilot can do a lot of the work for you. The feature will intuitively create meeting prep for you overnight and then store everything offline. Just make sure your calls are entered for the next day and Autopilot can do the rest.

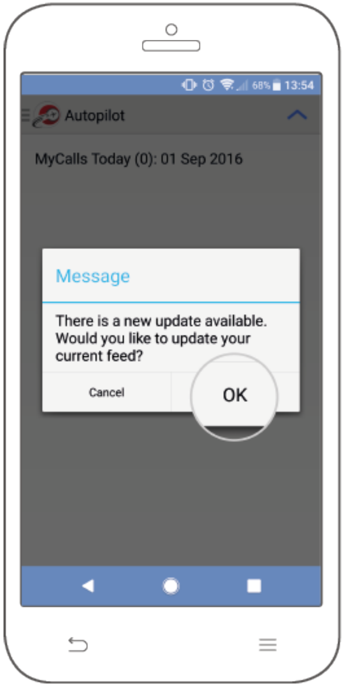
How to log in

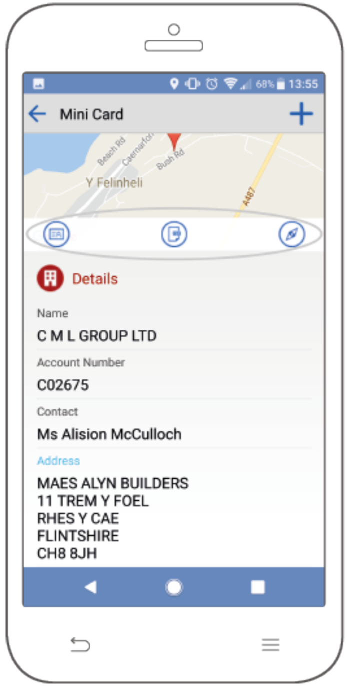
Close down the sales-i app and reopen it so you can access the login screen.

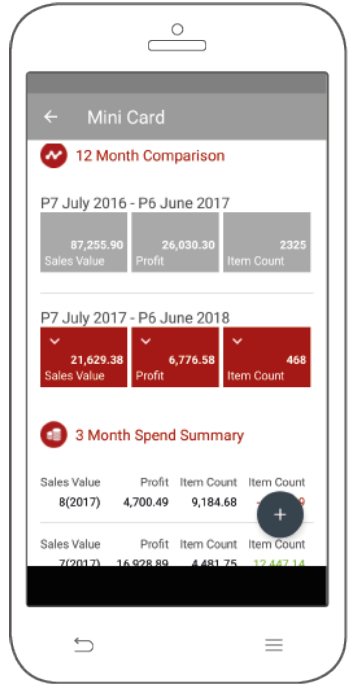
Here, you should see a big blue button reading Autopilot. Appropriately, this is your gateway to the Autopilot feature of sales-i.

Note: if the blue button isn't there, talk to your Power User about getting Autopilot set up on your account.









Instant Snapshots

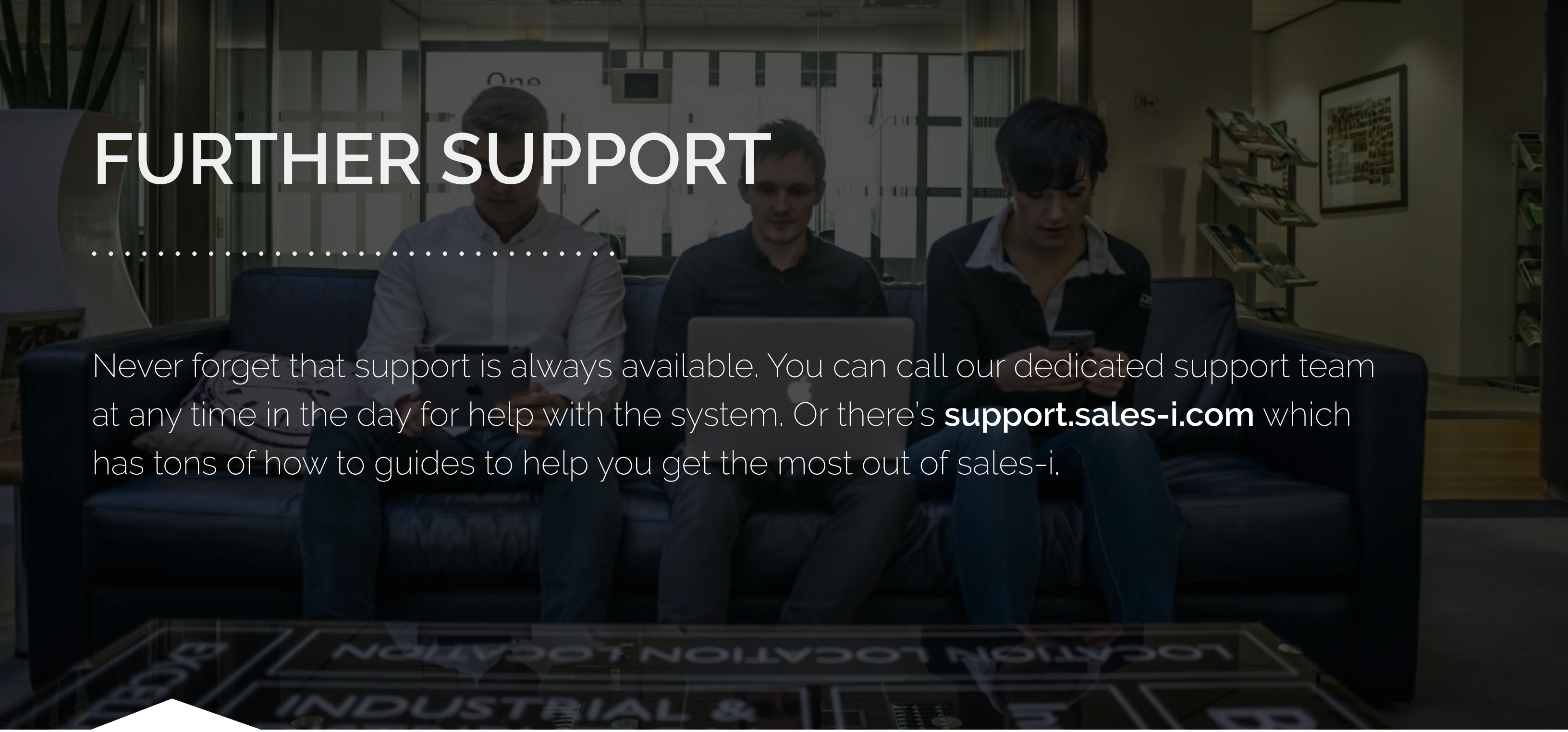
As soon as you sign in, sales-i downloads the day's Snapshot reports for you.

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

Never 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 **support.sales-i.com** which has tons of how to guides to help you get the most out of sales-i.

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