THE INTRO

Salespulse internal enablement guide

STEP 1

Why are we doing this?

?

TO MAKE MORE SALES!

INCREASED INFORMATION FROM THE PROSPECT

+

RECONNECTING WITH MISSING PIECES OF INFORMATION

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BETTER ABILITY TO UNDERSTAND OWN DEVELOPMENT NEEDS

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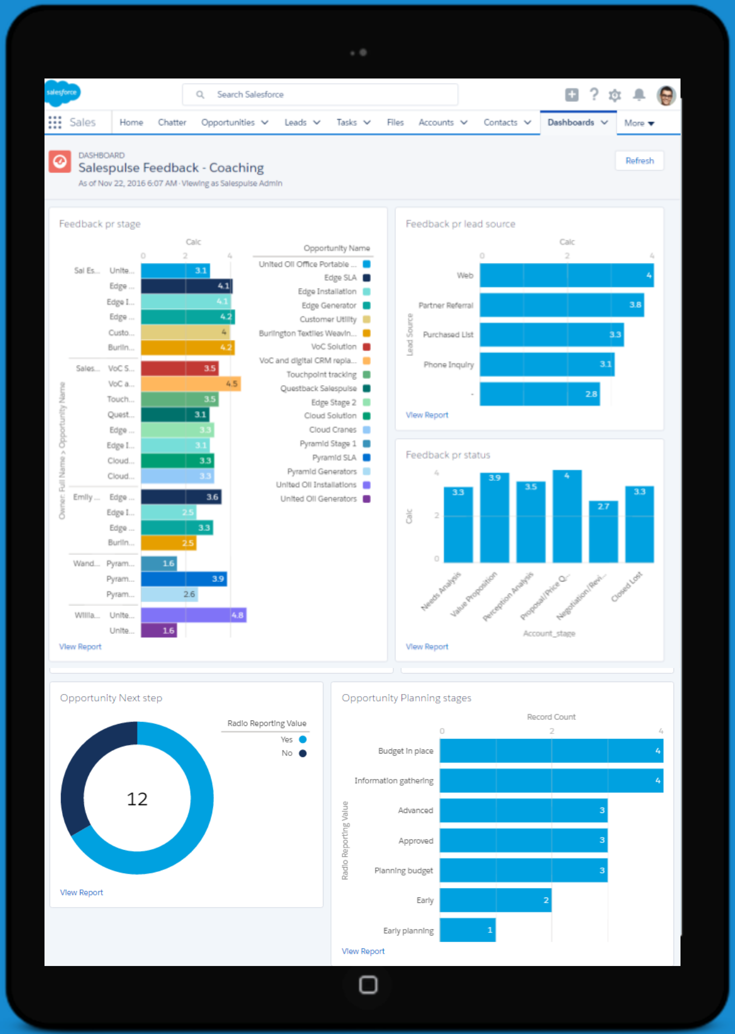
$$$$$$

INTRO

WHO IS IT FOR



Salespulse

for...

The Sales Executive

a tool for managing sales and coaching employees towards better results

The Sales Representative

assistance in developing their own sales style and uncovering success

The Organisation

more information about customers, as well as higher quality offers and better sales results

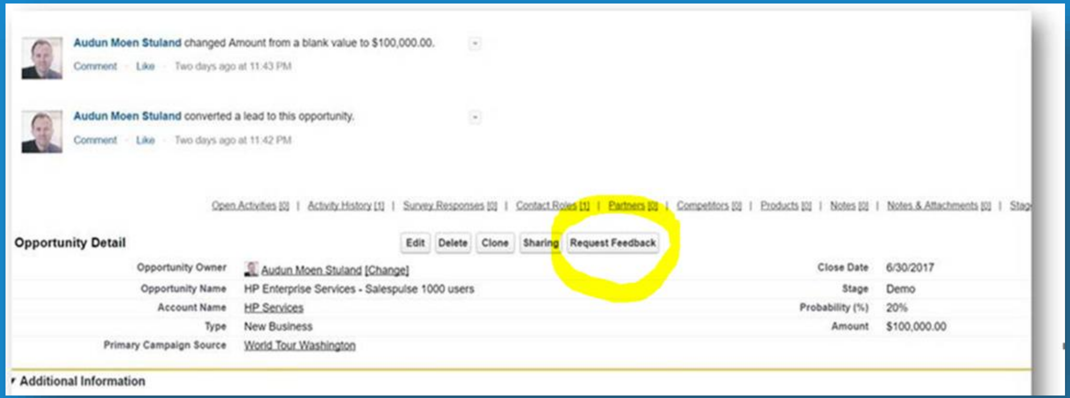
HOW DO WE REQUEST FEEDBACK AFTER MEETINGS?

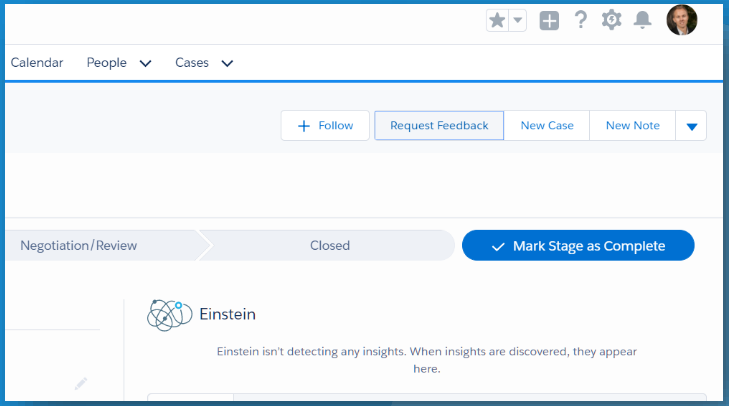
DAILY USE

HOW TO USE FOR SALES REPS

If you are using Salesforce 1 mobile you find the «Request feedback» button in the lower left corner on opportunities, accounts, leads and contacts

In Salesforce Classic and lightning you find the «Request feedback button» on top of the opportunity detail. Account details, contact details and lead details





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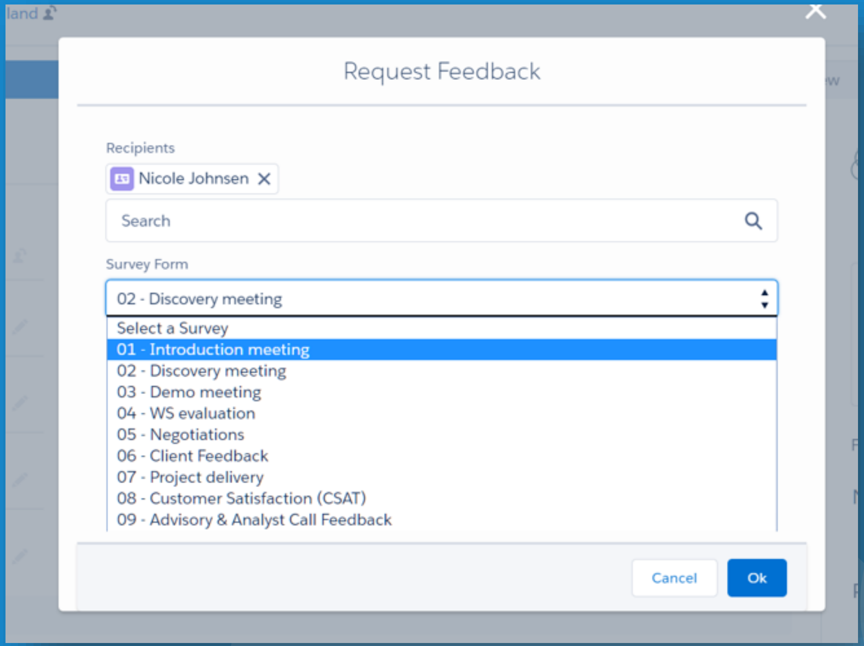
DAILY USE

HOW TO USE FOR SALES REPS

HOW DO WE REQUEST FEEDBACK AFTER MEETINGS?

You then select which recipient you want to send to. The contacts linked to that opportunity will be pre-selcted
And you choose what survey template you send. All your available survey templates will show up in the list

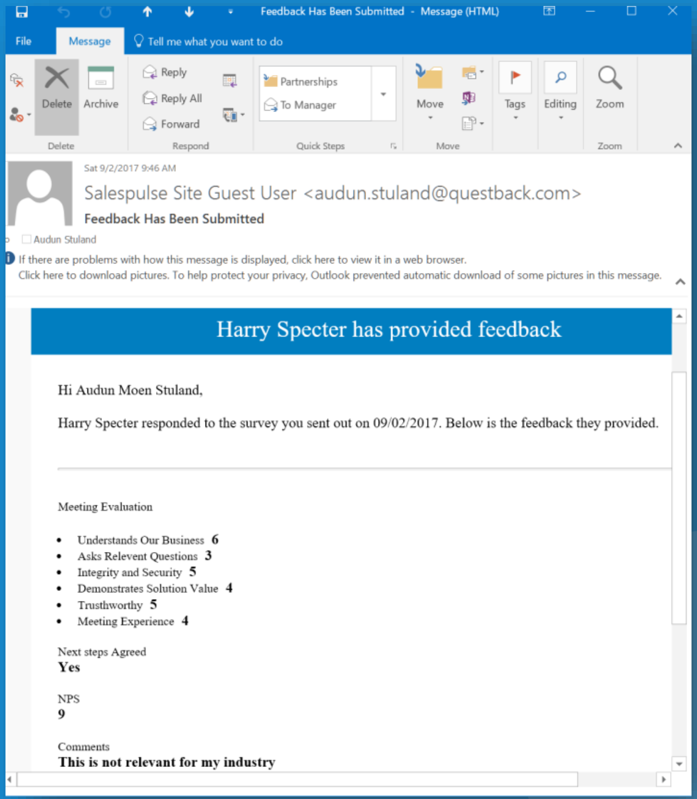


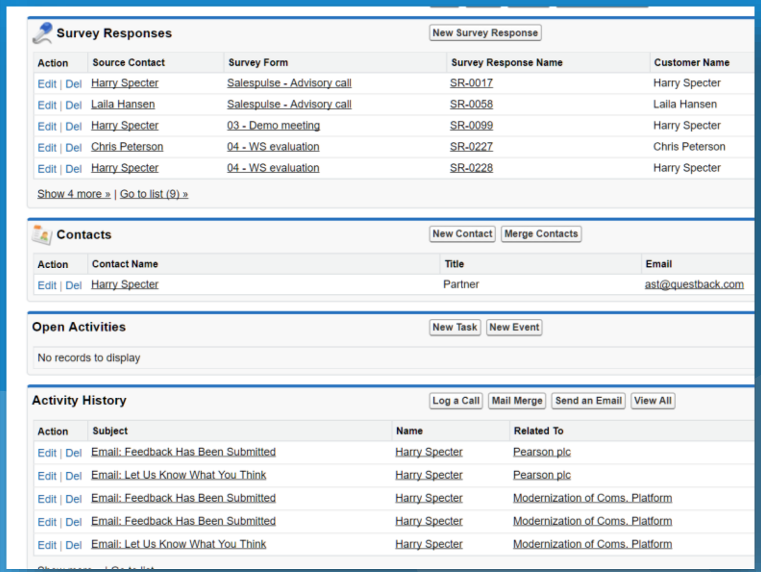
HOW DO SALES REPS USE THE FEEDBACK DATA?

A copy of the feedback response is emmideatly sendt to the sales rep. This gives the sales rep the possibility to re-engage quickly if something was missing.
You can also find all the feedback and feedback requests on the Survey reponse list and the activity history list on the opportunity , account and contacts page in Salesforce

DAILY USE

HOW TO USE FOR SALES REPS





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DAILY USE

HOW TO USE FOR SALES MANAGEMENT

FEEDBACK DATA ARE AVAILABLE IN REPORTS AND DASHBOARDS IN REAL-TIME FOR SALES MANAGEMENT

You can look at the Salesperformance in the 10 sample reports that follow the managed package. You may have to customize the report setting to show data from your Salesforce hirearchy.
Go through the feedback on every opportunity in your coaching sessions to uncover needs for development and next steps with customers