

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

+

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

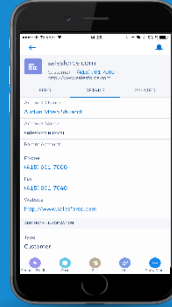
The Organisation

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

HOW DO WE REQUEST FEEDBACK AFTER MEETINGS?

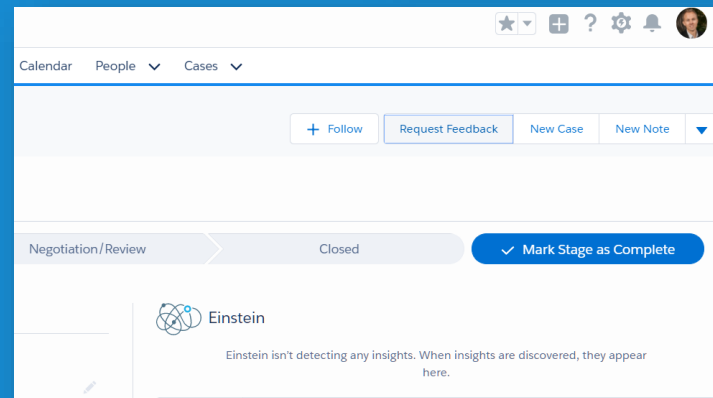
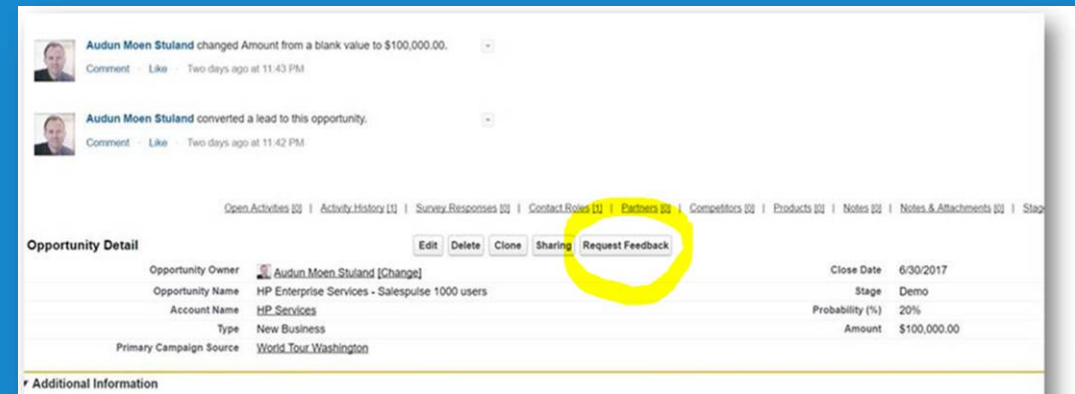
DAILY USE

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

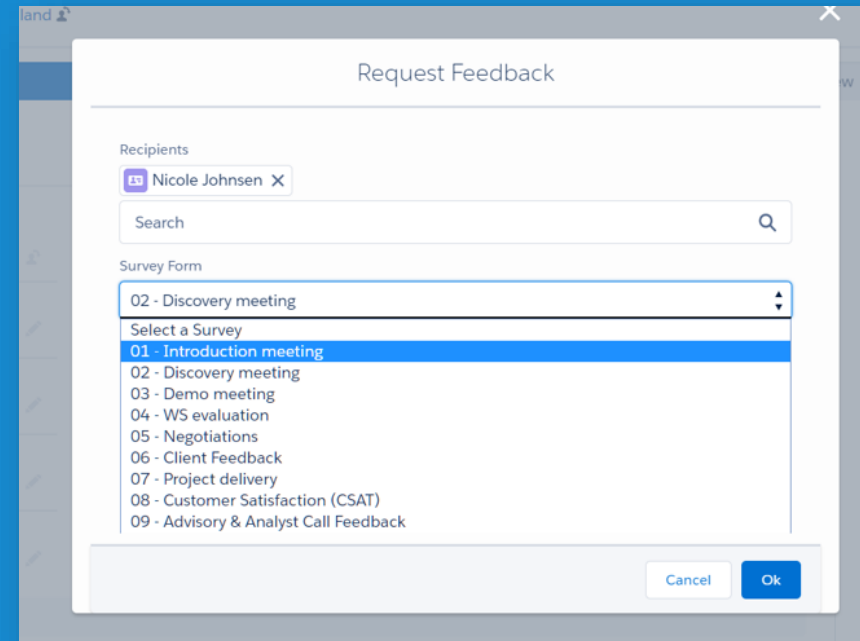


HOW DO WE REQUEST FEEDBACK AFTER MEETINGS?

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

DAILY USE

HOW TO USE FOR SALES REPS



The screenshot shows a 'Request Feedback' dialog box. It has a title bar with a close button. The main content area is divided into two sections. The first section, 'Recipients', shows a list of contacts with 'Nicole Johnsen' selected and a search bar. The second section, 'Survey Form', shows a list of survey templates with '01 - Introduction meeting' selected. At the bottom right, there are 'Cancel' and 'Ok' buttons.

Request Feedback

Recipients

Nicole Johnsen X

Search

Survey Form

02 - Discovery meeting

Select a Survey

01 - Introduction meeting

02 - Discovery meeting

03 - Demo meeting

04 - WS evaluation

05 - Negotiations

06 - Client Feedback

07 - Project delivery

08 - Customer Satisfaction (CSAT)

09 - Advisory & Analyst Call Feedback

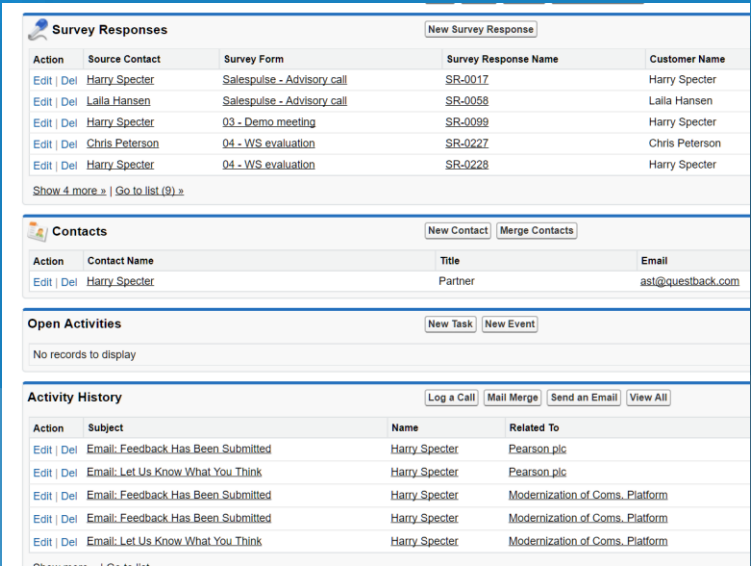
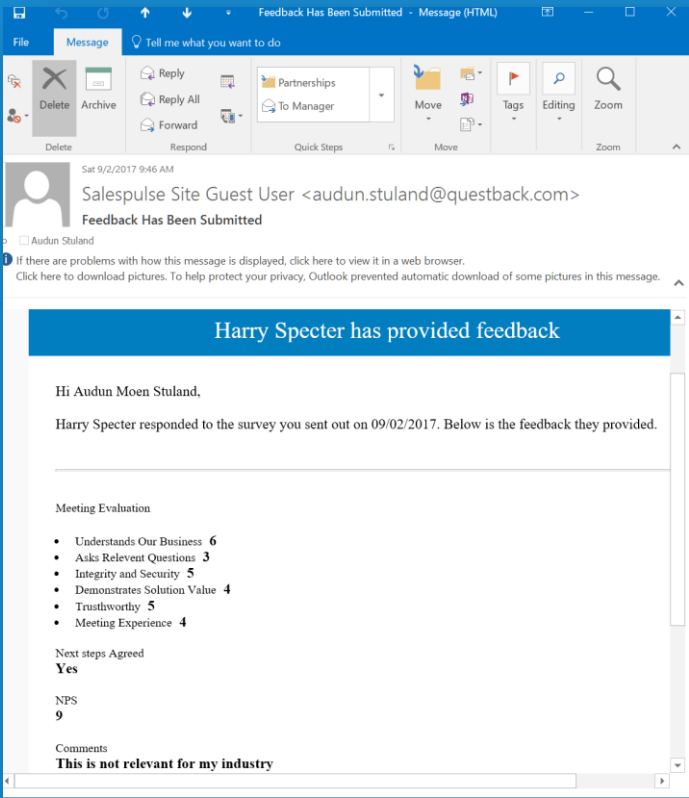
Cancel Ok

HOW DO SALES REPS USE THE FEEDBACK DATA?

A copy of the feedback response is immediately sent 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 response list and the activity history list on the opportunity, account and contacts page in Salesforce

DAILY USE

HOW TO USE FOR SALES REPS



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

DAILY USE

HOW TO USE FOR SALES MANAGEMENT

