

Account Call Management Solution

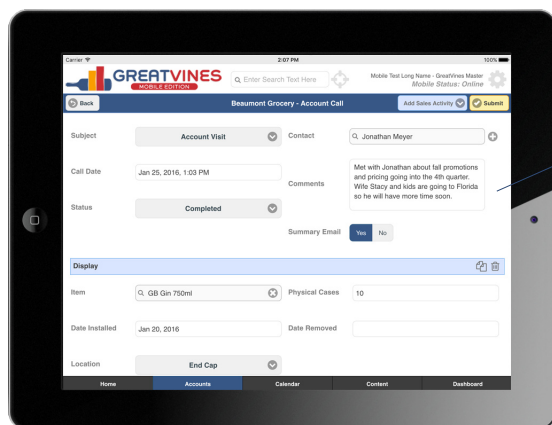


Empower your sales team to be more efficient and productive by leveraging a modern, mobile CRM tool.



GreatVines' Account Call Management Solution Benefits

- Improved and centralized cataloging of key account contacts, distributor reps, trade influencers and prospects
 - Ability to prioritize and track activities that drive the success of your brands
 - Convenient linking of calendars for quick, easy searches and audits of call histories including past and future contact with every target
- Better communication and pitching with detailed call summaries of sales activity for more personalized follow-up
 - More organized workflow delivers increased efficiency to maximize the power of your field sales team
 - Easy targeting of accounts for future activities with accurately recorded information from surveys and audits
 - Stronger task management and follow-up planning with automated reminders of “next steps” in the sales process delivered to relevant users by the system



Arm sales teams with accurate information on every account. Ensure timely communication with a tool to systematically create the next calendar event or reminder task for the next, **personalized interaction** as soon as the last one is complete.

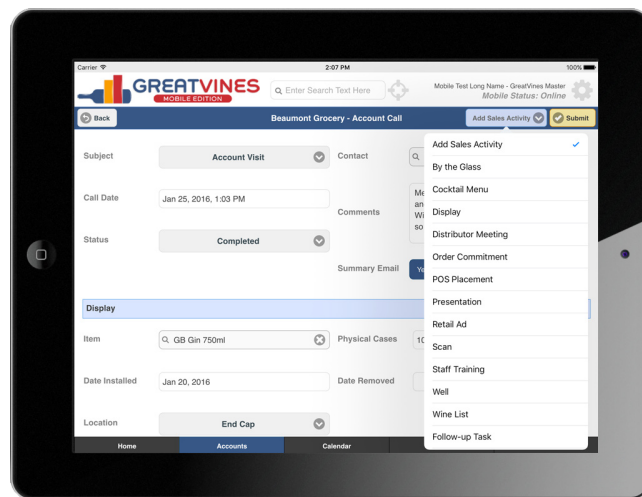
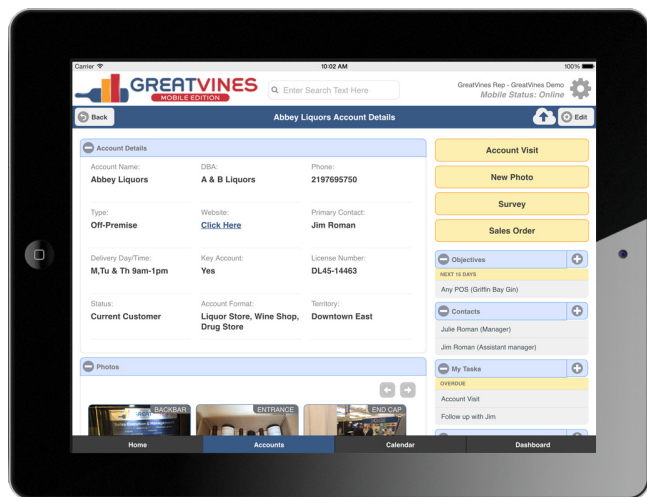
BOTTOM LINE

If you're not using CRM tools to manage account calls, you're leaving money on the table. Harvard Business Review reports companies implementing CRM increase sales 10% to 30% on average.

Automate the following processes for more timely, measurable and effective sales activity:

- **“Log a Call”** — allows users to select the accounts, distributors, and contacts they’ve interacted with (or quickly create contacts) and capture the relevant information by speaking or typing one or two quick sentences
- **Call Types Selection** — helps in differentiating between phone calls and a more engaged visit
- **Continuity Building** — capture the details of conversations held between visits; build off salesperson’s notes or summaries of the last visit
- **Complete Recap Report/Email** — immediate access to records of account calls including notes, person(s) met with, other activity details from the call and generate emails to the appropriate users to forward with comments to distributors, partners, managers, etc.
- **Follow-up** — Schedule your next visit via a calendar entry or follow-up task as you record your notes for the current account call

In addition, an account call report can be built to recap all account calls during a specific time period in one email. This is good to recap work with (supplier rep riding with distributor rep for an entire day making numerous calls). Once emailed, the person receiving the email can type additional comments into the form and reply back to facilitate ongoing communication and collaboration around the calls executed.



*“If you can’t measure it, you can’t manage it.”
— Peter Drucker, Renowned Management Consultant*

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