

An eBook by



5 THINGS EVERY SALES MANAGER NEEDS
AND HOW SALES-I HELPS.

A guide to the awesomeness of sales analytics for
the wholesale distribution sector.

OUR STORY

Where did it all start?

Back in 2008 when Bill Gates stepped down as Chairman of Microsoft, Google released the Chrome browser and Apple launched the iPhone 3G in 22 countries, sales-i was born. We blossomed from the idea of two salespeople who are now our co-founders.

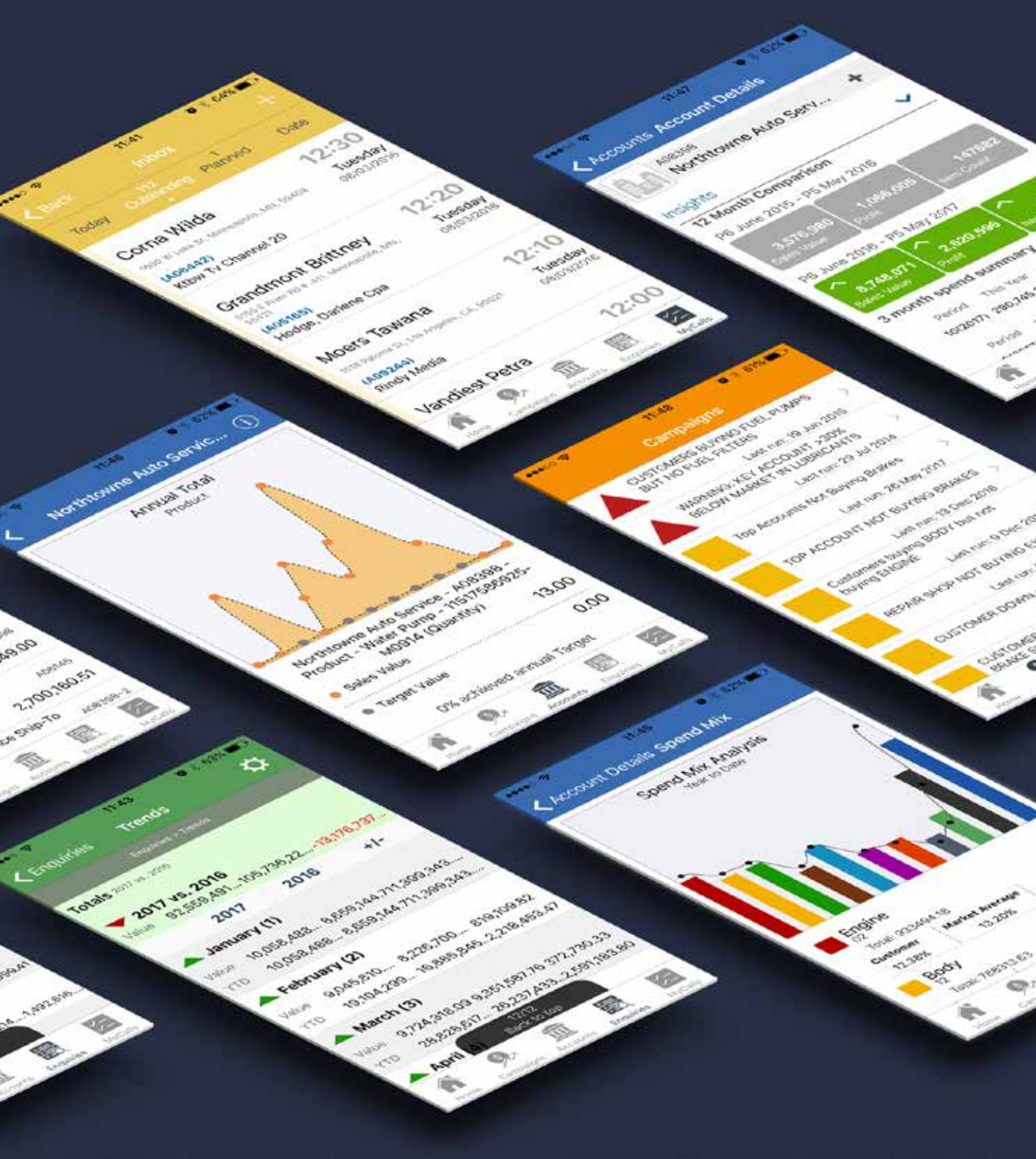
Together these pioneers of sales software shared a vision to create the first on-demand sales and customer intelligence service for the typical busy, overworked salesperson.

More than 20,000 people around the world use sales-i today.

The features of our software allow your sales team to be proactive in their calling, to spot sales opportunities that would have otherwise been missed, create targeted marketing campaigns and supply a complete overview of the performance of your business.

Our detailed sales analytics mean that every sales call will be personal and profitable, no more wasted phone calls to chat about the weather or last night's match.

We've got the awards to prove it too. Fastest Growing Tech Company, Best Big Data Analytics Solution, High Performing Sales Analytics Solution and even one of the best companies to work for. But our Grammy must have got lost in the post...



OUR MISSION

What do we aim to deliver?

Underlying everything we do here at sales-i is a deep commitment to innovation and continuing to deliver a best-in-class sales performance tool.

As such our mission is to help our users to protect their share of their customers' wallets, improve their profit margins and increase company profitability.

WHO WE WORK WITH

Who do we deliver to?

B2B, product based industries. Whether you're selling nuts and bolts, the latest craft beer or automotive parts – if you've got lots of products and lots of customer accounts, sales-i is the sales tool for you.

There are a few inherent things that every sales manager needs to make his or her job a whole lot easier. From better sales opportunities to follow up with to anywhere, anytime access to powerful information that will make their (and their team's) conversations with customers that bit simpler – that's what we're here to change with our sales performance software.

Here are 5 things that every sales manager really needs and how our sales software can hand them to you.



○ We aim to deliver a best-in-class sales performance tool.



○ Designed for manufacturers, wholesalers and distributors.



01

BETTER SALES VISIBILITY

A guide to the Enquiries feature.

BETTER SALES VISIBILITY

How much visibility do you have into your sales?

Sales itself is incredibly fast paced and if you stand still for even a split second, you'll probably be missing out on an opportunity somewhere. Having any kind of real visibility into the moving parts of any sales operation is a very real struggle that most sales managers will face more often than they'd like.

Having a clear-cut idea of precisely what is going on in your sales department is key. Whether you need to know how well a line item is performing, which product group is down this month or even which customer is costing you money; this level of visibility usually lends itself to hours spent interrogating spreadsheets.

“

Sales reps spend up to 43 hours every month searching for information.

- THE ABERDEEN GROUP, 2015

360-degree view of your customer accounts.



HOW SALES-I HELPS

Enquiries gives you the visibility that you need.

sales-i can help you to track and monitor the movers and shakers within your customer base. Whether they're falling in spend, buying new products or even if they've bought a line item but not the obvious complementary item to go with it; your entire sales department will always have a full 360-degree view of what is going on with your accounts.

Our Enquiries section is a hub of financial information and sales visibility. Each of our 5 Enquiries will help you to understand how your customers, products, branches and much more are performing.

Take the Variance enquiry for example. This report gives

dynamic top level figures for a specified date range so you can identify and stop any falling sales across your customer base before it is too late.

Sales vs Gaps lets you visualize the months where your customers have not spent a single penny with you.

If you need even more detail, a quick advanced drill in any Enquiry will take your query in any direction. Move from product categories, to territory, branch and even down to precise line items in a couple of clicks. Follow your natural chain of thought and sales-i will always keep up with you.

[GET A FREE DEMO >](#)

IN SUMMARY

- ✔ Staying abreast of changing customer habits, purchasing trends and drops in spend is a full-time job in itself.
 - ✔ sales-i actively analyzes and tracks your customer sales data drawing out the sales opportunities that lie within.
 - ✔ Better sales visibility is a given with our sales performance software without any of the legwork or manual data analysis.
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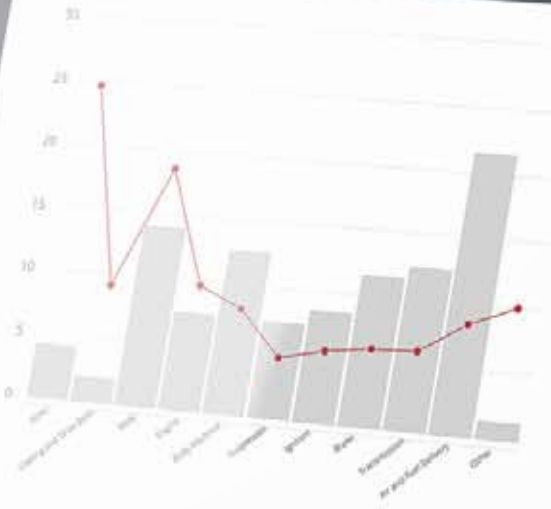
I made a couple of face to face customer calls after drilling down into two of our customers' buying habits, I made a presentation and left with sales worth over \$8,500!



SHELLY MILLER,
DIRECTOR OF SALES

YOUR LOGO HERE

PRODUCT GROUP PURCHASE ANALYSIS



Description	Total	% Share of Your Purchases	Average Customer Spend %
HVAC	20,988.71	3.92	24.80
Cooling and Drive Belts	5,407.13	1.81	7.71
Body	70,935.15	13.63	18.93
Body Electrical	38,070.66	7.31	9.37
Suspension	63,861.65	12.27	8.02
Ignition	37,238.96	7.15	2.75
Brake	43,345.12	8.33	3.80
Transmission	58,375.13	11.21	4.31
Air and Fuel Delivery	63,179.76	12.14	4.52
Other	109,016.28	20.94	7.00
Total	6,788.39	1.30	8.77
	520,606.94	100.00	100.00

Snapshot for Plum Custom Cars Inc

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Printed on Monday, 23 November 2015

MacBook Pro



02

SMARTER SALES REPORTS

A guide to the Snapshot feature.



○ Customize the information you see in your report.

SMARTER SALES REPORTS

How much time do you spend creating sales reports?

One of the biggest gripes of many sales managers is the time being spent on sales reports and meeting preparation. Whether presenting your figures to the board or using them in a customer account review, getting all the right information together in a timely manner before it's out of date is a challenge in itself.

Living in a world of endless spreadsheets and pivot tables, even the most seasoned of sales pros can fall foul of manual data analysis to spot trends, gaps in spend and where their next sales opportunity lies. Not to mention this data being outdated the second you send it to your boss.

This time could be better spent selling, proactive prospecting or following up with sales ready customers.



Sales reps spend only a third of their day selling.

- HUBSPOT, 2017

HOW SALES-I HELPS

Snapshot creates powerful reports in seconds.

The Snapshot reporting tool in sales-i makes any kind of reporting a breeze. You can create personalized account reviews for each customer, performance reports for your territories, branches and reps in a few quick clicks.

Include as many or as few sections in your Snapshot report depending on what you or your customer needs:

- ✔ Product groups by purchase value
- ✔ Top 15 products by purchase quantity
- ✔ Most frequently purchased products
- ✔ Purchases vs gaps
- ✔ Sales value comparison across two date ranges for any product group or line item

Simply add or remove the tables, charts or graphs you need to be in your report, edit pages or date ranges, select colors to match your company's branding and save as a professional report in a number of formats. View online, send to your customer to review before your next meeting or export into a professional report for your boss.

What's more, you can save your favorite report setup as a default for even faster reporting the next time you need it! Creating sales reports doesn't get easier than this.

[GET A FREE DEMO >](#)

IN SUMMARY

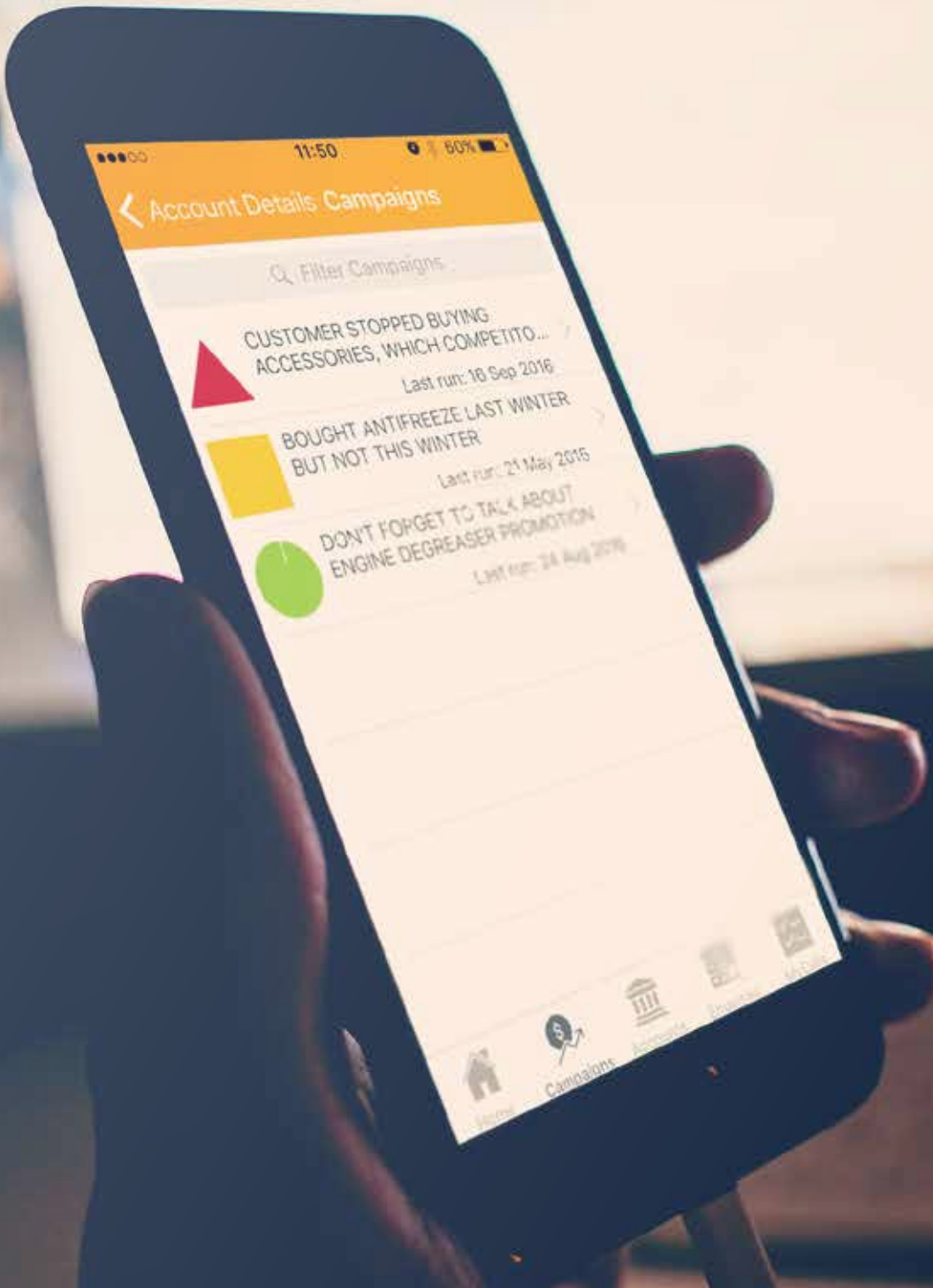
- ✔ No-one likes sales reports, least of all us! Our Snapshot reporting tool makes it a breeze, leaving you to get on with far more important tasks.
 - ✔ Create sales reports in seconds that you can customize, export and print for your next meeting.
 - ✔ Include a variety of modules that allow you to provide a rounded overview of your team's performance or customer sales activity.
-



sales-i gives us more control and allows us to track everything: from sales to customer targets and spend trends. I can produce detailed sales reports for directors every day within minutes!



MICHELLE PERRY,
BUSINESS DEVELOPMENT



03

BETTER SALES OPPORTUNITIES

A guide to the Campaigns feature.

BETTER OPPORTUNITIES

Does your team have quality sales opportunities to action?

Competition itself is a given in any industry, it's the nature of the beast. Taming it however, is a whole different ball game. 57% of the decision-making process is already done before you even engage with a customer, so you need to get there before your competition do.

But knowing exactly when a customer is looking for whatever product you're offering is like looking for a needle in a haystack. And the timeliness of your call can be the difference between a 'yeah, that sounds like something we need' to a flat out 'no'.

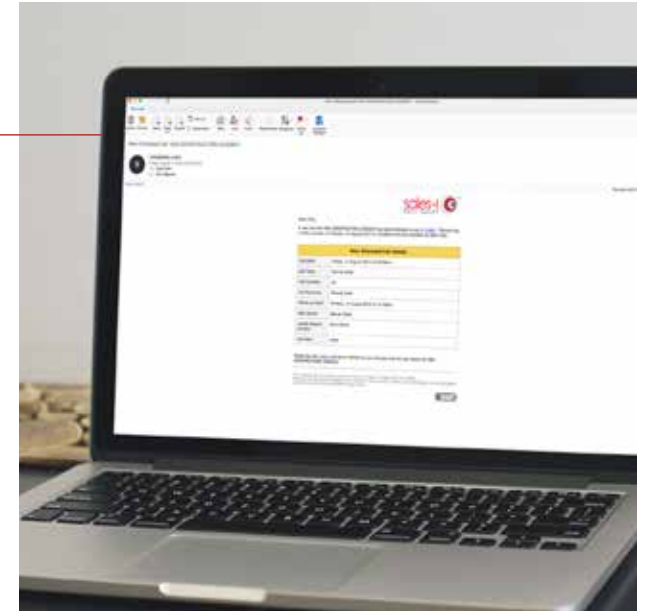
Selling as many categories of your business to every customer account is paramount for most consumable B2B businesses but having the visibility to know precisely which customers should be buying certain products is often just a pipedream.

“

71% of reps say closing more deals is top priority.

- STATEOFINBOUND.COM, 2017

Get sales opportunities sent straight to your inbox.



HOW SALES-I HELPS

Campaign Manager will alert you to new opportunities.

Our sales software will make a point of constantly crawling your sales data for new opportunities and alert you whenever a customer triggers your set criteria. Whether you want to know all customers that have bought bacon but not eggs (or any other obvious cross-sell) or which customers are based in a certain city but haven't been visited in the last 60 days; the simple drag and drop tiles allow you to build campaigns that really matter to your business.

Campaigns can be as creative as you need: from identifying valuable cross-selling opportunities to monitoring any customers that are down in spend in a particular product group in a certain territory; Campaign

Manager is a proactive tool that will ensure you never miss another sales opportunity again.

Some examples of the kind of Campaign you can build in sales-i:

- ☑ Show me which customers have spent more than \$4,500 with me for the last 11 months but are yet to spend this month
- ☑ Show me all my customers that have dropped by more than 20% sales value compared to last year
- ☑ Show me which customers regularly buy coffee but haven't yet taken advantage of our Spring Promotion

[GET A FREE DEMO >](#)

IN SUMMARY

- ☑ Ensuring warm sales leads are generated at a steady pace and followed up on is key, whether from existing customers or new prospects.
 - ☑ Alert your sales team to easy to close sales opportunities with Campaigns built to suit your business' needs.
 - ☑ Create tailored Campaigns that mean something to your business, track your performance and monitor which offers or promotions bring in the most sales.
-



sales-i has had immediate benefits! We produced one campaign to show us customers that had previously purchased but hadn't in 2017. It returned 94 results. On day one, 30 of these accounts were contacted which resulted in 7 orders and 4 further opportunities.



NICK SEARLE,
SALES MANAGER



← Graphs Top 5 Customers

Northtowne Auto Service
A08398



Sales Value YTD

Northtowne Auto Service



A08398

Shawnee Service

7,541,349.00



A06145

Northtowne Auto Service Ship-To

2,700,160.51

A08398-2

- Home
- Enquiries
- Accounts
- Enquiries
- MyCalls

04

**ANALYTICS
ANYWHERE, ANYTIME**

A guide to the mobile apps.



Update, access and action information on the go.

ANALYTICS ANYTIME

Do you have access to important information whenever you need it?

The fast-paced nature of most B2B businesses mean that we need access to the tools that help us to do our jobs, anywhere and at any time. Enter a string of mobile apps and smartphones in every pocket. Our desire for instant gratification has meant software and technology providers have had to really up their mobile game.

Any good salesperson will have made dozens of calls to IT to ask for customer X's recent sales history when you're sat outside their office. Having access to your company's customer data and historical sales information that you need, as a salesperson, to make better, more informed sales decisions is imperative in today's sales environment.

Showing up empty handed for a chat about the weather is no longer acceptable.



88% of reps have no access to sales data on their phones.

- CSO INSIGHTS, 2017

HOW SALES-I HELPS

Be prepared for meetings whenever and wherever you are.

We know all too well how important it is to have access to sales and customer data while on the move. We developed two native mobile applications for iOS and Android that mean you have access to all your sales data, past conversation history, unmissable sales opportunities and key talking points wherever, whenever.

With access to a full suite of sales analytics reports, our apps allow you to drill down through your data with ease, view quantities sold, GP, value and cost for any account on the fly and manage account activity so you always know what's going on with your customers.

What's more, our Autopilot function allows you to access powerful sales data, download handy sales reports and update sales-i CRM even when you don't have an internet connection. Best of all, Autopilot is free for every sales-i user.

[GET A FREE DEMO >](#)

IN SUMMARY

- ☑ Being connected 24/7 is part and parcel of the fast-paced nature of B2B businesses and salespeople alike.
 - ☑ To be the very best and beat the competition to every sale, B2B sales teams need mobile access to sales data, customer information and sales opportunities.
 - ☑ sales-i's mobile apps give you and your team access to analytics on the move and delivers the ability to update CRM, customer records and stay on top of changes in customer spending patterns from any web-enabled mobile device.
-



sales-i is incredibly quick at providing a simple view of any lost or falling sales. You can access information that is as granular as you need it whether you're out in the field or in the office. sales-i is the best off the shelf tool I have come across!



DAVID MAROUN,
VP OF SALES



05

SALES ACTIVITY INSIGHT

A guide to the MyCalls/CRM feature.

SALES ACTIVITY INSIGHT

Can you track where your team are and what they've done?

One of the biggest challenges any sales manager will face is the need to know more about what their team is getting up to. Which customers are being visited? Which aren't being visited frequently enough? Are your salespeople just making the 'easy' sales calls out of habit and neglecting other accounts?

Having this kind of insight into your team's activity is imperative for any sales manager to understand exactly where they are spending their time.

Prioritize your sales calls every day.



80% of closed sales take five or more follow ups.

- MARKETING DONUT, 2017



HOW SALES-I HELPS

MyCalls will manage your day to maximize sales.

Most salespeople rely solely on spreadsheets and their email calendar to keep their schedules in order. If someone moves on to pastures new, all that information usually goes with them. sales-i's integrated CRM ensures that no valuable customer data is lost or taken away from the business should there be a change in staff. What's more, you'll have full access to every scrap of customer information coupled with their sales data; meaning you get a full rounded view of any customer without interrogating dozens of different systems.

As a sales manager, you'll be able to track exactly where your team are, where they should be going and precisely how their activity is contributing to your sales targets.

With the ability to record call notes and follow-up actions, create a full profile of your customer accounts for better marketing and stay on top of the things that matter to your business, our CRM means you're always ahead of the game.

Copy in your colleagues or forward on next steps to your customer straight from their record card. Any emails that you do send to your customers from your email client will sync directly into sales-i CRM so you never miss a trick.

[GET A FREE DEMO >](#)

IN SUMMARY

- ✓ As a sales manager you need to understand precisely where your team is spending its time, which activities are lending themselves more favorably towards increased sales and where your team may be lacking.
 - ✓ sales-i provides a central location for all of your team members' activity, from sales calls and meetings to notes logged and performance against targets.
-



sales-i gives us a CRM solution and also a solution to our reporting and data analysis needs. It really was the best of both worlds combined in one software product. sales-i is invaluable to us now and I can't imagine going back to how we did it before!



MIKE ROSENBERG,
DIRECTOR OF SALES

CONCLUSION

Why you need sales-i.

As manufacturers, distributors and wholesalers continue to generate reams of valuable sales data every day, the need for a tool like sales-i becomes increasingly apparent.

No salesperson in these industries is capable of analyzing lines of data to extract sales opportunities, track customer spend and stay on top of competitor activity; not while concentrating on other more pressing tasks like interacting with customers, recording their activity and scheduling follow ups.

The need for easy access, self-service analytics is rocketing with 78% of organizations planning to increase the use of business intelligence software in the next 12 months.

sales-i provides a holistic answer to the sales analytics needs of any wholesaler, distributor or manufacturer. With intuitive dashboards, easy data analysis, simple reporting tools and much more, sales-i is becoming the analytics tool of choice in your industry.

[REQUEST A DEMO >](#)

ABOUT

We are the leader in sales performance for distributors and wholesalers.

sales-i is sales performance software designed to make every sales call more personal and profitable.

sales-i enables sales professionals to clearly identify and target high quality sales opportunities within their current customer base. Equipped with customer buying behavior alerts, salespeople can make insightful, personalized, quick business decisions, realizing repeat sales, reduced customer attrition and maximized profit margins as a result.

sales-i will change the way you sell. [Get in touch](#) for a free, online demonstration and judge our software for yourself.

✉ tellmemore@sales-i.com

📍 www.sales-i.com

“sales-i has had immediate benefits! We produced one campaign to show us customers that had previously purchased but hadn't in 2017. It returned 94 results. On day one, 30 of these accounts were contacted which resulted in 7 orders and 4 further opportunities.”

- Nick Searle, FineCal Distributors

“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, BuyWise Auto Parts

“We've closed off the financial year 58% up on the previous year and attribute this directly to sales-i and their sales performance software.”

- Larry Sexton, Office 360°