




Optimizing Sales Team Efficiency With Salesforce Routes & Schedules

A Case Study on Reducing Administrative Work for RSMs



The Challenge: Managing Client Visits & Admin Work

- RSMs travel extensively for client meetings
 - Struggle with logging visits and follow-ups in Salesforce
 - Manual data entry feels like a distraction from selling
 - Inconsistent visit tracking affects forecasting and accountability
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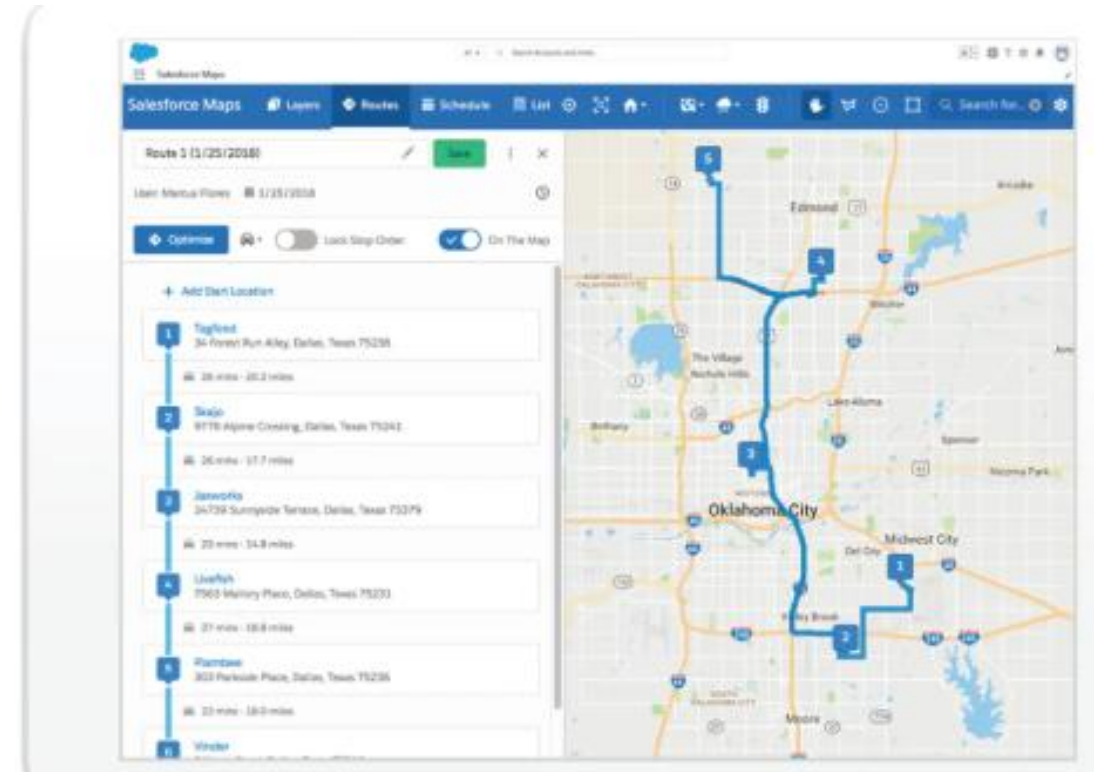
Impact Of Inefficient Sales Activity Tracking



- Missed follow-ups lead to lost opportunities
- Inconsistent data tracking affects sales insights
- Time spent on admin work limits productivity
- Reducing manual effort increases efficiency

Streamlining Client Visits With Salesforce Automation

- Preloaded visit schedules optimize travel routes
- Automated check-in eliminates manual entry
- Voice dictation replaces lengthy note-taking
- Scheduled follow-ups keep client engagement consistent





AUTOMATED CHECK-INS: LESS ADMIN, MORE SELLING

- **GPS-Based Check-In:** Salesforce auto-detects arrival
- **QR Code/NFC Check-In:** Scan & log visits instantly
- **Voice-Activated Check-In:** Speak commands to log activity
- Improves data accuracy and reduces manual work



Never Miss A Follow-up Again

- **Rule-Based Follow-Ups:** Auto-schedules next action based on visit outcome
- **AI-Powered Smart Reminders:** Predicts best follow-up timing
- **Task-Based Assignments:** Integrates reminders with key sales tasks
- Keeps sales teams engaged with clients proactively



Personalizing The Process For Every RSM

- **For Analytical RSMs:** Use structured templates for detailed reporting
- **For On-the-Go RSMs:** Utilize quick voice notes & mobile check-ins
- **For Relationship-Focused RSMs:** Automate tracking with minimal input
- Ensures all sales managers benefit from the system, regardless of work preferences



The Future Of Efficient Sales Operations



- ☒ Faster visit logging
- ☒ Improved data accuracy
- ☒ Reduced manual admin work
- ☒ Enhanced client engagement through proactive scheduling
- ☒ Increased sales efficiency and productivity

Implementing The Solution In Your Team

- Step-by-step rollout for seamless adoption
- Training sessions for sales reps on Salesforce automation
- Continuous monitoring for optimization
- Ongoing support for enhanced efficiency





THANK YOU

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