



# Sales Master PRO

Sales from a marketing perspective

## **Build more profitable, intimate relationships.**

Make every customer a VIP customer with his entire history at your fingertips, including past proposals and related files. See important customer information right away and store valuable information such as his industry, size, offered solution, and expected order dates and values.

Basic data entry takes place through two main categories; Accounts and Contacts -beside the Products/Services category- containing more than 75 fields of data.

### **[Accounts] include:**

- Account name.
- Size.
- Industry.
- Importance.
- Responsible salesperson (account manager).
- Headquarters address (including details).
- Telephone(s), fax(es), and URL.
- Comments.

In addition, tax information and files from any format could be related to accounts. Related files are opened with its default associated program.

### Business information includes:

- Local address (including details).
- Business description.
- Company email.
- Tax registration number.
- Tax authority service.

### Related files include:

- Date.
- File path.
- Description.
- Ability to open file.

### **[Contacts] include:**

- Title.
- Name.

In addition, data entry takes place through three main areas in three tabs; Personal info, Business info, and Marketing info.

### Personal info includes:

- Birthday.
- Birthday reminder.
- Language(s).
- Household lifecycle position.
- Spouse / Partner name.
- Children.
- Anniversary.
- Anniversary reminder.
- Home address (including details).
- Home and personal telephone(s), fax, email(s), and URL.

Business info includes:

- Company.
- Company size.
- Industry.
- Department.
- Profession.
- Job title.
- Level of education.
- Income.
- Assistant name.
- Manager name.
- Business address (including details).
- Business telephone(s), fax(es), email, and URL.

Marketing info includes:

- Gender.
- Type.
- Importance.
- Mailing address.
- Billing address.
- Prospecting method.
- Diffusion of innovation rate and acceptance.
- Approach method.
- Ethnic interest.
- Hobbies.
- Comments.

[Products/Services] include:

- Code.
- Name.
- Comments.

### **Relate files to accounts.**

Keeping track of all exchanged files for each account assures seamless information retrieval. Related files are opened with their associated programs on your system.

### **Tailor your approach per customer's personality profile.**

One of the distinctive competencies of Sales Master is the personality identification feature. Up to the moment, Sales Master is the only CRM software performing this task. Sales Master not only helps you identify your customer's personality profile, but it also suggests proper tactics to approach him / her with. As a result, you'll be able to tailor your sales tactics to meet his / her behavior and influence the purchase decision.

Personality identification data could be entered through the three-tabs form titled "Personality Identification". By default, the "Tactics" tab will be selected showing the following message:

"No suggested tactics. Please answer all questions in Assertiveness and Responsiveness tabs."

By pressing the "Assertiveness" tab and answer all the 12 either-or questions using the radio buttons, then pressing the "Responsiveness" tab and doing the same, then pressing the "Tactics" tab, suggested tactics to approach your customer / prospect will be automatically displayed. You can get on-the-spot help for each of the Assertiveness-Responsiveness questions through the box at the end of the form.

### **Stay on top of your schedule 24 / 7.**

Schedule business meetings sales calls quickly and easily. Meetings planner including date, start time, end time, meeting description, and alert notification before meetings' start time.

### **Build rapport by remembering special events.**

Setting alarms for both birthdays and anniversaries to remind you of these important events helps you build rapport and create loyal customers.

### **Track follow-up activities, history, and milestones.**

Date-stamped notes for each contact are included in order to keep track of various follow-up activities, previous history, and important milestones that built the relationship. Before making an important follow-up call on an important customer, check his complete follow-up record so you're armed to make an intelligent and effective phone call.

Follow-up function includes:

- Follow-up date.
- Contact method.
- Offered solution.
- Sale status.
- Role in sale.
- Expected order value.
- Expected order date.
- Description.

### **Search using different filters and criteria.**

Thanks to Sales Master's powerful filtering feature, all details are available all the time. Data mining capability with 30 different variables to search with is available at your fingertips.

Filter function includes searching by any combination of the following variables:

- Mobile.
- Home address (including details).
- Business address (including details).
- Gender.
- Type.
- Importance.
- Household lifecycle position.
- Prospecting method used.
- Diffusion of innovation.
- Approach method used.
- Ethnic interest.
- Hobbies.
- Level of education.
- Company.
- Company size.
- Department.
- Industry.
- Profession.
- Job title.
- Income.

### **Send bulk email.**

Save your time and spend more of your day selling. After searching with whatever criteria you want, you're only one click away from sending emails to the entire search result list.

### **Analyze your customers / prospects data.**

Analyzing your customers / prospects data and providing ratios that help you best utilize your time and effort is no more an option. Do not waste valuable time in useless prospecting and approach methods any more.

Lookup data analysis function includes:

- Gender analysis.
- Household lifecycle position analysis.
- Level of education analysis.
- Industry analysis.
- Company size analysis.
- Income analysis.
- Prospecting methods analysis.
- Approach methods analysis.

**Generate and print on-demand reports.**

A complete set of version-controlled reports is available upon request, illustrating all available information and showing all activities and results.

**Import data directly from Microsoft Outlook.**

No need for re-entering your contact information if it's currently in Outlook. Sales Master imports [Contacts] directly from Outlook 2002(XP), MS Office Outlook 2003, or MS Office Outlook 2007.

**Import data from Text (TXT) and / or Comma Separated Values (CSV) files.**

Using Outlook Express or Microsoft Excel? Export your [Address Book] from Outlook Express and save it as a CSV file, or similarly save your Excel book as a CSV file. Sales Master imports CSV files having the proper format.

In addition, the included database administration functions are:

- Database backup.
- Database restore.

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