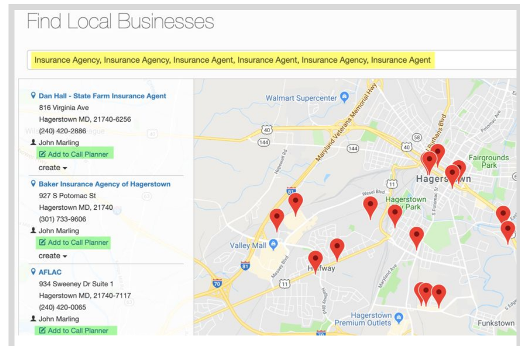
SALES TEAM

PULSE CALL PLAN QUICK LAUNCH GUIDE

Step 1. FIND PROSPECTS TO ADD TO YOUR CALL PLAN

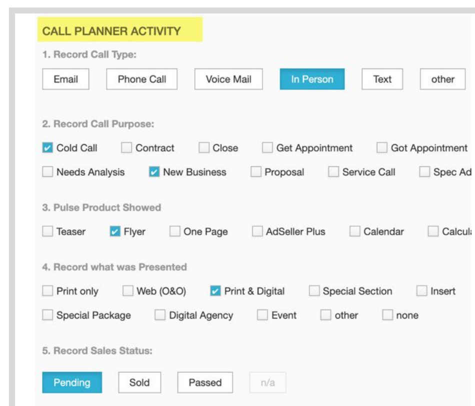
5-Ways to find prospects for your call plan

+ Identify prospects from a **map** of your sales territory.
+ From **Pulse Hot Prospects** identify hot leads based on close % and most sold. Tip: Pulse Top 10 list.
    + Special Sections. Sort by category column such as Automotive for Automotive Special Section leads.
+ Add a business to your call plan from **Accounts.**
+ Search from **Business To Help** on dashboard.
+ From **Reader Buying Power** find a business in a category that has huge spending like RV dealership.
+ Add any business to your call plan with one-click.



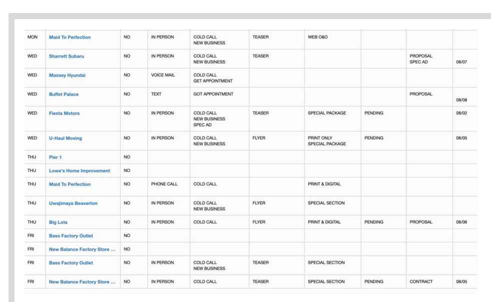
Step 2. RECORD YOUR SALES ACTIVITY

+ Record sales activity for a business on the account page. Either click on the business name on your call plan or go to the Accounts tab
+ Click on **Add New Call Planner Activity** and enter the appropriate sales activity steps for the business.
+ Add more sales activity throughout the week for each business on your call plan.



Step 3. SUBMIT YOUR CALL REPORT / SHEET

+ Print a daily or weekly Call Sheet
+ Or save as PDF and email to Sales Manager



PULSE TIPS

+ Track all sales activities each day and keep detailed notes for reference.
+ Use the Call Planner to track the use of Teasers
+ Keep the Business profile up to date. Remember to add new account information.

MANAGER

PULSE CALL PLAN TIPS & BEST PRACTICES

REVIEW STEPS - AD REP CALL PLAN LAUNCH

+ Quickly review the Call Plan Guide with your Sales Team to get their buy-in.

HOLD CALL PLAN LAUNCH SALES MEETING

+ Identify day to start using the Call Planner

ASSIGNING PROSPECTS TO AD REP

+ Add a couple of businesses to the Call Plan to get them started
+ You can add prospects and leads to your reps call plan at any time. They will get an email notification that you have added a business to their Call Plan.

MONITOR YOUR TEAMS CALL ACTIVITY IN REAL TIME

+ Track daily and/or weekly Call Plan use and results
    + You can see your teams' sales activity in real-time. You no longer have to wait and beg to get their sales report.
+ Provide feedback and encouragement
    + Since you "see" their prospects and progress in real-time, you can engage much more effectively.

PULSE TIPS

+ Inside Sales Team. Quickly increase service directory revenue. The team can create category targeted prospect lists in seconds (like insurance agencies) and then have the words to say to get the attention of the business and make the sale. (thought you might like to know there are 2,837 households who plan to change or get a new insurance agency)
+ As the manager, you can add businesses to an ad rep call plan/prospect list.