Day in the life of a Sales Person: How Voice To CRM Is Changing How We Sell
About Taptera.

We produce mobile apps that empower sales teams to be more responsive, nimble, and create happier customers.

- San Francisco, HQ for Top Management, Key Engineering, Design, and Product Teams
- Warsaw, Poland, Engineering and Development

- 24 Full-time Employees
- 300 Local and global resources
- 5 Years of iOS and Android experience
- 20,000 Enterprise sales users
Disclosure

is an investor.
Why are we here?
TIME = MONEY
Where the time goes – ideal v. reality

TYPICAL SALES REP
% OF WEEKLY HOURS

- Lunch / Breaks 6%
- Misc. 4%
- Planning 10%
- Travel 13%
- Administration 23%
- Selling 22%
- Service 10%
- Order Processing 12%

SALES REP - IDEAL PROFILE

- Lunch / Breaks 8%
- Planning 5%
- Travel 15%
- Administration 15%
- Selling 33%
- Order Processing 12%
- Service 12%

©2010 Pace Productivity Inc.
Breakdown of admin activities

- 5.5% time spent on CRM
- 2.7% on order processing
- 3.1% generating reports

*Source – Sales Benchmark Index*
One other habit
Voice turns downtime into productive time?

“Remind me to call Fred when I leave work.”

OK, I’ll remind you.

Reminders

Call Fred Chaffee
Leaving: Work

Type: Meeting

Name:

Status: Completed

Related To:

Due Date:

Subject:

Priority: Normal

Sample Required Field:

Had a great meeting with this customer about our new product.

Log a Call

Send

Cancel

25th St

25th St
toward Fountain St

25th St
toward Fountain St

Toward Fountain St

Toward Fountain St

Then

Then

Then
Missing most of the problem

- Transcription focused
- Either too general or too specific
- Little relief for big three - CRM, order processing, reporting
Missing most of the problem

- Transcription focused
- Either too general or too specific
- Little relief for big three - CRM, order processing, reporting

“Just closed the Lilly deal”
Future – Context Aware Voice Assistants

- Understand time & place
- Connect to corporate systems
- Tap into public data
- Vocabulary focused on type of task
- Virtually unlimited bandwidth, memory and CPU

“Just closed the Lilly deal”

- Lilly as customer
- Deal marked “closed” in CRM
Sophia by Taptera
Your Intelligent Assistant for Salesforce.
Update the Eli Lilly Colleagues Opportunity to $85,000.
Update the Eli Lilly Colleagues Opportunity to $85,000.

Ok, here's what we're going to do...

Update the Eli Lilly Colleagues Opportunity to $85,000.

Cancel  Let's Do This
Capture

Accounts

Eli Lilly
Indianapolis, Indiana 46285

Marsh McLennan
New York, NY 10036

Update the Eli Lilly Colleagues Opportunity to $85,000.

Cancel
Let's Do This
One company’s results

CRM Interactions Logged

- Doubled number of updates period
How this was done

- 90% of all “on the road” updates are to log meetings, tasks, and calls
- Limited grammar of ~60 verbs
- Dictionary & relationships seeded from CRM
Mobilize your Sales Team