

SELLING ON THE GO

5 MUST-HAVE APPS FOR THE MOBILE SALESPERSON

BY ADAM HARVEY



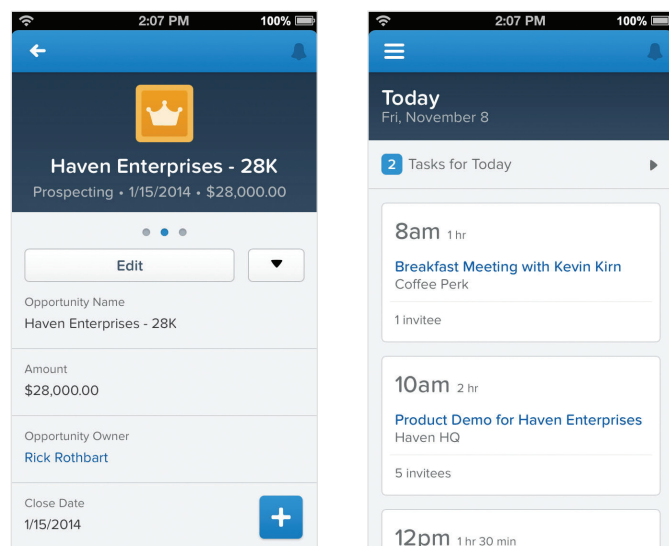
The life of a salesperson can be incredibly challenging. Besides the countless meetings and appointments that come with the job, there are also conversations to keep track of, networking events to attend, and presentations to give. It can get quite overwhelming, but there are some great apps out there to help make the whole sales process easier. Here are some of my favorites.



Salesforce1 (Free)

Salesforce is a powerful Customer Relationship Management (CRM) tool. If you haven't heard of CRMs, you need to get on board! They are systems that help you manage the way your business interacts with customers. They track calls, emails, notes, presentations, support, and marketing—everything that defines your relationship with a customer.

Why should you keep track of all of this with a CRM? Because once you have the data, you can make better decisions. Useful for organizations of any size, Salesforce lets you access solutions for sales force automation, customer service, partner management, marketing, and campaign management. You can centralize all the loose ends in a concentrated hub to help run your business more efficiently.



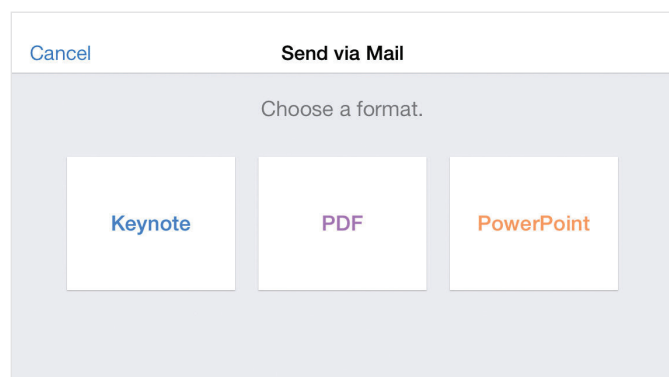
Like most CRM apps, Salesforce doesn't always get rave reviews. But when you think about how complicated a CRM can be and how much it does, it's still very much worth it. It has glitches here and there, but overall, I think the app performs well—in fact, I would be lost without it.



Keynote (\$9.99)

Keynote is one of those apps with a laundry list of amazing features, but learning how to master it seems like a daunting proposition.

You want tools? It's got plenty. You want animations? Yup, it's got those too, plus it can even export them through many common formats. In short, it's really hard to beat in terms of creating, editing, and viewing presentations—and it can do it all from your iOS device.



When you start creating a presentation, you can choose from

one of the 20 or so built-in templates, or you can choose to create it from scratch. The interface is straightforward and intuitive, and tweaking the slides is easy to do through touch gestures.



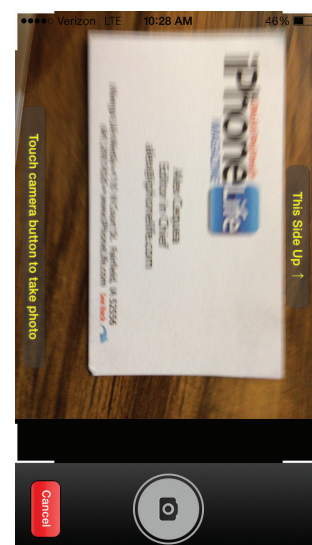
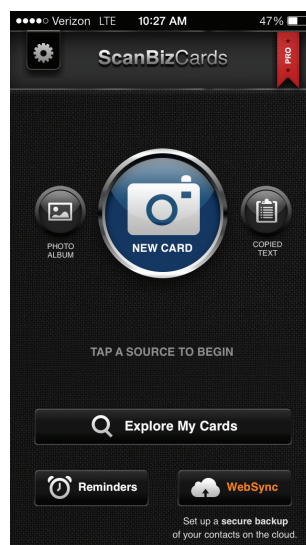
These days, people expect a fully immersive multimedia experience, and Keynote delivers here, too. Videos import simply and without any major issues. If you want to spice things up, adding animations to slides is straightforward, and the effects can really pack a punch. The app also has multiple undo levels if you decide you've moved in the wrong direction.

If you've recently picked up a brand new iOS device or upgraded from an old Apple device, you can download Keynote for free. If you have an older device, Keynote will cost you \$9.99, which is still a fantastic deal for such a capable product.



ScanBizCards Business Card Reader (\$1.99)

You've probably seen (and tried) those Optical Character Recognition (OCR) apps that promise to take a picture of an associate's business card and seamlessly add it to your contact list. Unfortunately, you've probably also seen how incredibly inaccurate those OCR apps can be. I had just about given up on them entirely until I started using ScanBizCards. Since it can also export contacts to Salesforce, I find it especially convenient. However, you don't have to be a Salesforce user to enjoy this app.



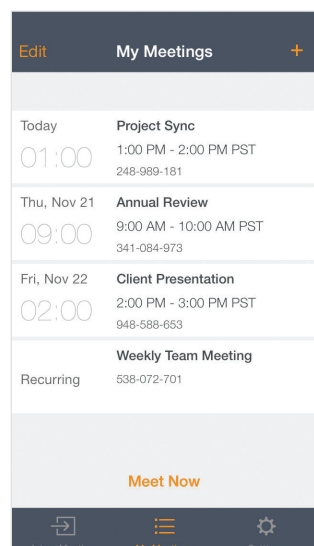
What's unique about ScanBizCards is that it offers you the choice of scanning cards or sending them in to be translated for 100-percent accuracy. They actually have human beings doing the transcribing and proofreading! While the time to transcribe varies and costs an additional \$0.18 a card, I've always been pleased with the results. The OCR option works well enough, but I'll take accuracy over speed any day. In this case, technological "progress" has proven to be less reliable than old-fashioned eyes and fingers.

ScanBizCards has many other features as well: virtual rolodexes, Evernote integration, calendar reminders, LinkedIn connection, and CRM compatibility, just to name a few.



GoToMeeting (Free)

Since sales can take place outside of face-to-face meetings, being able to run and access web conferencing is an absolute must. GoToMeeting is one of the best-known services in the virtual meeting space, and for good reason. The app delivers a smooth, multi-platform conferencing experience that takes up minimum bandwidth.



The GoToMeeting app is free for people who pay for the monthly or annual GoToMeeting web service. The cost varies, depending on the number of attendees you wish to be able to accommodate. The least expensive plan is \$19 a month for a maximum of 5 attendees. Using GoToMeeting is pretty simple: You get a secure URL for each meeting, and attendees can join via the app or the website, or by using a toll-free phone number. Meeting participants can even share their screens or use their webcams in high definition so that interactions are more personal.

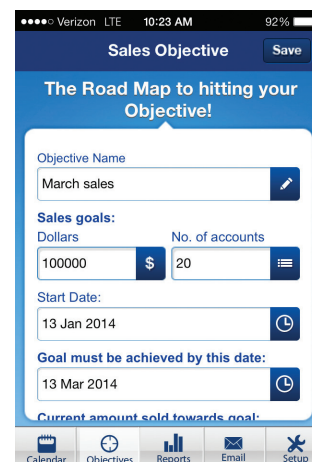
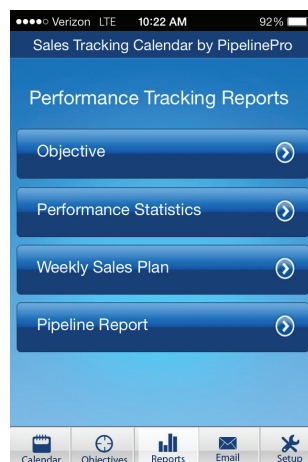
One cool feature is the ability to change presenters with the tap of a button, so that the responsibility of hosting an online meeting can be shared with another person. The ability to easily collaborate with other presenters is one of my favorite features of GoToMeeting. I'm frequently working as part of a team, and this gives me the ability to allow others in attendance to participate in our meetings.



Sales Tracking Calendar (Free)

If you're anything like me, you may have trouble keeping your built-in Calendar app updated. I know that a calendar is only useful when filled in, but recording appointments is always a hassle, so I'm always on the lookout for something easier. Entering appointments with Sales Tracking Calendar is simple. Whenever I communicate with a client, I enter the upcoming meeting in the calendar just like before. This is pretty easy,

since the app keeps track of all active contacts. When the appointment is over, that's when things start to get interesting. The app asks me immediately afterwards whether the meeting fell into one of these categories: "sale," "follow up," or "not interested." If it's a sale, I can just put in the amount. If it's a follow up, the app prompts me for the date and time and puts it back in the calendar. If it's a "not interested," the account gets removed from my pipeline automatically.



The app shows me the accounts that are still in my pipeline through a Pipeline Report. The accounts are easy to track, because they are always up to date with the information I've been adding along the way. This saves me the extra step of having to manually update information at the end of each day. Sharing the Pipeline Report with my teammates just takes one tap.

At the end of the week, the app generates a Performance Statistics Report from the activity metrics and closing ratios. The app will also extrapolate a Sales Activity Plan that tells me how much work I'll have to do in the next week in order to hit my sales objectives.

I've tried a lot of different sales tracking apps, but most of them are bulky and have a steep learning curve. Sales Tracking Calendar is intuitive, and it doesn't have hidden fees, ads, or in-app purchases. That works for me!

Any list like this one needs to include a social network like LinkedIn (free) as a great networking and lead-generation tool. There are also super apps like Parking Meter Pro (\$0.99), which helps you time parking meters in order to avoid parking tickets, and Beanhunter (free), which helps you find a cup of coffee wherever you happen to be. These tools will not only help you smooth your entire sales process, but they can also help you close more deals! [🔗](#)



With a background in systems architecture, database development, programming, e-commerce, search engine optimization, social media, mobile development and all things technical, Harvey lives life on the edge of technology. He is at the forefront of his field as Principal and Technology Director at GLAD WORKS, a full-service creative agency located in Pawtucket, RI.