

Ace Every Call | Counselor Planner for CRMs

By Wilson Learning Corporation



Available on AppExchange

FACT SHEET



Salespeople need to stand out with more businesses vying for the same customers. Remaining viable requires salespeople who can better respond to customer's business needs, priorities, and interests than the competition. It begins with a Counselor Mindset and the commitment to add value with every interaction. The *Counselor Planner* enables salespeople to immediately apply newly acquired skills so they can *Ace Every Call!*

Details

Ace Every Call integrates into your existing CRM to support your sales team in applying their newly learned skills in their everyday work.

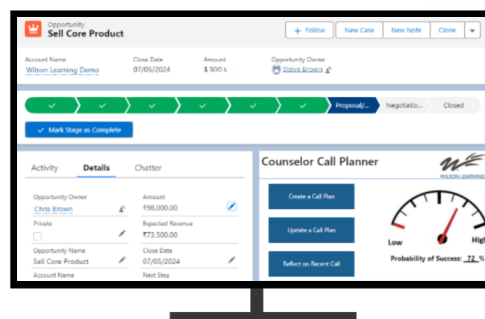
Ace Every Call empowers sales professionals to strategize, execute, and thrive in their interactions with prospects and customers.

Sales professionals will be able to plan, track, and monitor individual sales calls with prospects and customers based on Wilson Learning's proprietary sales methodology. The application also supports salespeople in creating customer-facing sales documents. At a glance, sales managers can track the progress of sales calls to help them focus their coaching.

Outcomes

Ace Every Call provides a comprehensive, skill-based CRM tool focused on applying the skills from *The Counselor Salesperson™* to:

- **Create a Call Plan**
Craft a strategy to pave your path to success with a well-planned call.
- **Update a Call Plan**
Capture meeting results and next activities. Chart actionable steps from recent calls.
- **Reflect on a Recent Call**
Think about your call and how it went. Were you prepared? Were your objectives met? Plan what you need to do next.



Manager Support

Sales managers are provided with information on the progress of the opportunity on their CRM dashboard. This provides them with valuable insights into sales opportunities, enabling them to drive team success through coaching and support.

Call Date	Subject of the Call	Probability of Success	Outcome: What Went Well?	What Could Have Gone Better?
16-Apr	Initial Relating Call	5	Client was engaged	Client did not commit to second call
18-Apr	First Discovery Call	28	Client openly answered my questions	Need not completely defined yet
21-Apr	2nd Discovery call	44	Identified Gap	Client had to cut meeting short
23-Apr	Present and discuss Discovery Agreement	56	Client agreed with my Discovery	Budget not clear
25-Apr	Present my Solution	72	Strong Buying Signals	The client requested a discount

Join the ranks of successful sales professionals who trust the Counselor Planner to achieve sales success and Ace Every Call