

Compass Sales Solutions ViewPoint Survey Feature for Compass Sherpa

Boise, ID – (September 2016) Compass Sales Solutions, the industry leader in sales opportunity software, has a Viewpoint Survey tool that allows you to create internal customized survey questionnaire forms for potential sales.

As an Admin you are able to create these forms and make them available to any user (Sales Reps, Telemarketers, Product Specialists, and any other Sherpa users) to assist in tracking all types of valuable account data throughout the sales cycle, from discovery to ongoing account management. You have the ability to tailor the content of these questionnaires for each survey created and set required fields creating a unique pre-sales checklist which can be a tool to streamline your sales process and allow users to develop a profile for potential sales leads.

Reps are able to access any survey on their accounts and have the option of populating an Excel template with the questions and responses to save, print, or email. Activities can also be tied to the surveys, with the Admin able to select a different activity type for each survey.

Troy Casper, President of Compass Sales Solutions says, “The ViewPoint Survey tool was initially developed for Sales Reps to qualify MNS prospects, but we realize this could be used universally throughout your dealership in many departments. From qualifying to managing your accounts, this is a great tool for Sales Reps and Managers alike.”

This complimentary feature is available to current Compass Sherpa clients. To learn more about this great tool, contact our training team at training@compasscontact.net.

About Compass Sales Solutions: Since 2001, Compass Sales Solutions has been the leading sales force automation provider for the office technology industry in 4 countries with over 15,000 users. Compass Sherpa provides a comprehensive suite that automates all aspects of the sales process and allows your sales professionals to utilize one tool to completely manage their sales goals. This includes prospect/client identification, Outlook integration, product configuration, proposal generation, MPS analysis and mapping, ERP integration, and mobile access via smartphones and tablets. Compass Sherpa will be the tool your team will **want** to use, not **have** to use.

