

James

Manager

OPERATIONALLY MINDED

SALES EXPERTISE

TEAM-ORIENTED



About

James is responsible for driving regional sales performance and supporting his field team. Each morning, he aligns with reps on goals, addresses challenges, and adjusts strategies before they head into the field. While his team works on the ground, James provides support from the office and occasionally joins ride-alongs for hands-on coaching. He relies on SPOTIO’s dashboard to monitor activity, territory coverage, and performance in real time.

James also manages territory assignments and compiles insights to share with leadership. He values tools that highlight trends, flag issues, and support targeted coaching. As SPOTIO introduces AI features, he sees strong potential in using them to streamline reporting, assess performance faster, and lead his team more effectively.

Daily / Weekly Activities

- Leads (Manage and Import)
- Territories (Manage)
- Team (Manage)
- Users (Manage)
- Activities (Manage)
- Autoplays (Manage)
- Routes (Manage)
- Analyze field data trends
- Company Docs (Manage)
- Team Coaching
- Export data to other systems

Goals

- Track his team’s location, activities, and performance in real time
- Map out territories to target the best prospects
- Review reports and train his team on best practices

Pains

- Making sure team is motivated and stays on task
- Need to constantly onboard and train new reps
- Communicate with the team in real time
- Gather valuable leads