

# Adam

## Sales Rep

TECH-SAVVY

SALES EXPERTISE

GOAL-ORIENTED



### About

As a canvasser, Adam starts his day with one clear goal: turning leads into prospects. Each morning, he meets with his manager and teammates to align on daily goals, share challenges, and strategize outreach. After the meeting, he opens the SPOTIO app to review his schedule or plot his route using the Map feature. Adam spends most of his day in the field, away from the office and direct oversight, so he relies on having everything he needs—tasks, customer info, and communication tools—at his fingertips.

To stay productive, Adam aims to minimize time spent on admin work and maximize face time with customers, moving opportunities forward. He’s open to using AI features like route optimization, auto-generated messages, and lead summaries—provided they save him time and are easy to use. Tools that reduce friction and help him stay focused on selling are highly valuable to his workflow.

### Daily / Weekly Activities

- Leads (Permission Based)
- Activities (Manage)
- Autoplays (Permission Based)
- Routes (Manage)
- Communication Templates (Permission Based)

### Goals

- Visit and convert as many leads as possible
- Easy route his schedule activities
- Stay in contact with his leads
- Track sales activities, performance
- Use AI summaries to prepare quickly before visits
- Draft follow-ups faster with suggested message templates

### Pains

- Needs quality leads
- High turn-down rate
- Too much time spent typing notes or messages after each visit
- Needs training/onboarding
- Hard to communicate with the team
- Being in-field, walking, weather, etc.