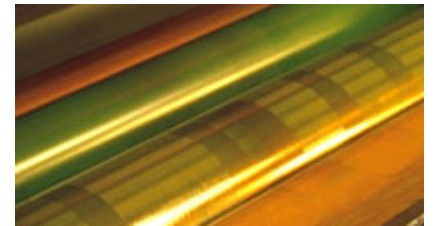


JOBZ!

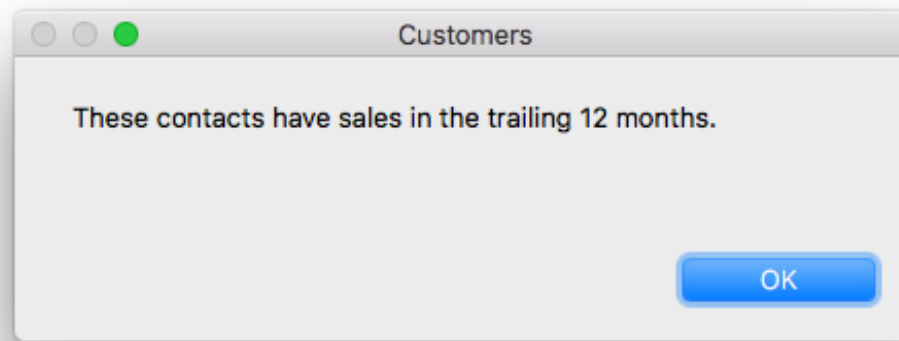
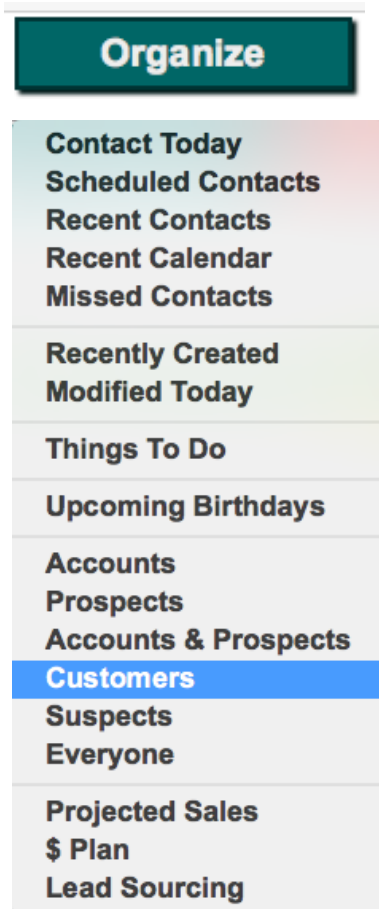
Sales Management Through Self Management

Part 2; People



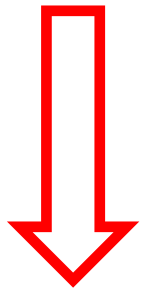
Seize the Data

- Sales reps maintain contact data in JOBZ!
 - Customers, Prospects, Delivery Destinations etc.
- Contact data supports workflow.
 - RFE > Proposal > SOP > Invoice
- JOBZ! also organizes the contact data into Sorts and Reports.
 - Contact history, reminders, marketing groups, etc.
- Sales reps use these Sorts and Reports to manage themselves.
- Management uses the same Sorts and Reports to manage sales.



The Data Set

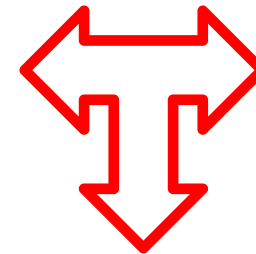
Sales Rep



Rep Data

Manager

Rep Data



Rep Data

Rep Data

Objective- CRM (Customer Relationship Management)

- Paperwork Flow & Communications
 - Request for Estimate, Proposal, Order Entry, Confirmations, etc.
- The JOBS tab:

JOBS	ADDRESS	MEMOS	EXPENSE
Go To			
		<<	< > >>

- Contact (People) Management:
 - Prospecting
 - Marketing
 - Territory & Account Assignments
- The ADDRESS tab:

JOBS	ADDRESS	MEMOS	EXPENSE
Go To	= 1 / 1 Jim Taylor - Carpe Data =		
		<<	< > >>

Jim Taylor Friday, October 28, 2011

ADDRESS Contact Management: Sales Automation

Click to record a contact made today.

Add last contact to History and set a next contact.

The screenshot shows the ADDRESS Contact Management software interface. The main window is divided into several sections:

- Top Bar:** Includes navigation buttons like "Go To", "Organize", "New...", "Output", "Actions", and "Find...".
- Contact Details Panel (Left):** Displays information for "Mr. Rich Text", a "Designer" at "Database Testing, Inc.". It includes fields for "Co. Type", "Address", "City, State, Zip", "Email", "Direct", "Fax", "Toll Free", "Pager", "Category", and "Temp.". A "Google Map" icon is present next to the address field.
- Notes Panel (Bottom Left):** A text area for "Notes" with instructions: "This area is for general notes about the contact. The 'History' field is kept automatically by using the 'Last Contact' and 'Next Contact' buttons." It also mentions "Send contacts and appointments to MS Outlook" and "From this screen you can also directly access and create correspondence that remains linked to this person." Below the notes is a "Former Company" field.
- Contact Management Panel (Right):**
 - Today:** A section for recording a contact made today, with a "Today" button and a "Record a last contact with a group of people." button.
 - Last Contact:** A section for recording the last contact, with fields for "What", "Comment", and "Clear X".
 - Next Contact:** A section for planning a next contact, with fields for "Next Contact", "Date", "What", "Why", and "Delegate To Do".
 - Contact History:** A section for viewing the contact history, with a "Contact History" button and a "Delegated To Do" button.
- Company List (Far Right):** A list of all the people in the company, including "Steve Austin", "Lois Bidder", "Lance Boyle", "Max Clearance", "Noah Dia", "Hans Free", "Richard Head", "Amber Lith", "Ruby Lith", "Di Lux", "Robin M. Blind", "Aart Major", "Phil N. Goode", "New Name", "Accounts Payable", "Al Payslo", "Jean Pool", "Serge Protector", "Susie Queue", "Receiving", "Central Receiving", "Rich Text", and "Phil Thepresses". A callout box explains: "List of all the people in the company. Click on them to navigate, and isolate the company as a found set."

Annotations and red arrows point to specific features:

- A red arrow points from the "Google Map" icon to the "Address" field.
- A red arrow points from the "Record a last contact with a group of people." button to the "Today" button.
- A red arrow points from the "Plan a next contact with a group of people." button to the "Next Contact" button.
- A red arrow points from the "Contact History" button to the "Contact History" section.

Text descriptions on the left side of the screenshot:

- "Tab panel: View of Jobs for this person, by title, or by date. Memos is correspondence to the person. Delivery is where you enter notes that will appear on Delivery Instructions. Budget sets a sales target for the person, that can roll up to a company-wide sales budget."

Text description at the bottom of the screenshot:

- "Contact History is kept by clicking the Today button and using the fields below it, then clicking the Next Contact buttons."

Knowledgeable use of this screen benefits the Sales Rep, and by extension, Management

ADDRESS Categories

Company-wide Segments on this tab.

Regional-specific Segments are behind this tab.

Multiple ways to categorize a person.

Go To = 5 / 23 = << < > >> Organize New... Output Actions Find...

Name Mr. Rich Text
 Title Designer
 Company Database Testing, Inc.
 Co. Type Computer Software
 Address 1999 S. Bascom Ave.
 Address Line 2 Suite 700 USA
 City, State, Zip Campbell CA 95008
 Email pressok@yahoo.com
 Direct 408 395-8183 Cell 408 666-7356
 Fax 408-395-0813
 Toll Free 888-734-9348
 Pager 408-666-7356 Cust. # 36779
 Category Account Temp Target

Check all boxes that apply. Management defines available selections.

Check or un-check a found set of people.

Build a marketing campaign around these segments, in combination with any of the other categories.

Export selected contact data to Excel to upload to an email campaign service.

Or use the data to drive a digital variable data press. You are a printing company, right?

Rich Text's Coworkers

JOBS	/ date	PO	MEMOS	- from	Notes	Delivery	Budget	Alt.
Month	Year	Plant	Type					
January	X 2012	CD	Litho				\$125,000	
February	X 2012	CD	Litho				\$250,000	
March	X 2012	SF	WF				\$12,500	
March	X 2012	CD	Litho				\$10,000	
May	X 2012	CD	Litho				\$10,000	
12 Mo	\$102,529	2010	\$28,412	Budget			\$407,500	
				YTD			\$102,529	

\$ Plan Note \$Plan Budget Report Chart

Rich buys the best printing and the best wine.

Campaigns

- ☒ JOBZ News
- ☐ Management Newsletter
- ☒ Newsletter
- ☐ Support Newsletter
- ☐ Test
- ☐ User Newsletter

ADDRESS: Merge Mail Capabilities

Build a found set of contacts by category, then send each of them a letter, or post card, or email.

JOBZ! Printing Sales Software

18338 Las Cumbres Road
Los Gatos, CA 95033
408-395-8183
jim@carpedata.com
www.carpedata.com

February 25, 2007

Hugh Saturation
File Edit View, Inc.
18338 Las Cumbres
Los Gatos CA 95033

Hello Hugh,

This is an example of a Merge letter sent directly from JOBZ!

First, I selected a group of people that I wanted to send a message to, including you. The criteria for defining this group can be extremely flexible. For example, I might want to send a printing sample to all my Designers. Then I can narrow this list down, or expand it to include Prospects in the Banking segment.

Then I typed this text, a salutation and signoff, and clicked Print. You (and all the others) are viewing the result. Personalized for you, with my company's letterhead graphics and even my signature. I can also print envelopes or address labels.

Or, using the JOBZ! / Email integration capability, I could eliminate the paper and send an individual email to each recipient.

Finally, the contact history field of each recipient is updated with the date and subject of this memo, so I can later be reminded of what I sent to whom, and when. I can even schedule follow-up phone calls to remind me later to have a conversation about it with each recipient.

Thanks,

Eric Clapton
Carpe Data

February 25, 2007

Amber Lith
Database Testing, Inc.
18338 Las Cumbres
Los Gatos CA 95033

Hello Amber,

This is an example of a Merge letter sent directly from JOBZ!

First, I selected a group of people that I wanted to send a message to, including you. The criteria for defining this group can be extremely flexible. For example, I might want to send a printing sample to all my Designers. Then I can narrow this list down, or expand it to include Prospects in the Banking segment.

Then I typed this text, a salutation and signoff, and clicked Print. You (and all the others) are viewing the result. Personalized for you, with my company's letterhead graphics and even my signature. I can also print envelopes or address labels.

Or, using the JOBZ! / Email integration capability, I could eliminate the paper and send an individual email to each recipient.

Finally, the contact history field of each recipient is updated with the date and subject of this memo, so I can later be reminded of what I sent to whom, and when. I can even schedule follow-up phone calls to remind me later to have a conversation about it with each recipient.

Thanks,

Jim Taylor
Carpe Data

February 25, 2007

Richard Head
Database Testing, Inc.
18338 Las Cumbres
Los Gatos CA 95033

Hello Richard,

This is an example of a Merge letter sent directly from JOBZ!

First, I selected a group of people that I wanted to send a message to, including you. The criteria for defining this group can be extremely flexible. For example, I might want to send a printing sample to all my Designers. Then I can narrow this list down, or expand it to include Prospects in the Banking segment.

Then I typed this text, a salutation and signoff, and clicked Print. You (and all the others) are viewing the result. Personalized for you, with my company's letterhead graphics and even my signature. I can also print envelopes or address labels.

Or, using the JOBZ! / Email integration capability, I could eliminate the paper and send an individual email to each recipient.

Finally, the contact history field of each recipient is updated with the date and subject of this memo, so I can later be reminded of what I sent to whom, and when. I can even schedule follow-up phone calls to remind me later to have a conversation about it with each recipient.

Thanks,

Jim Taylor
Carpe Data

February 25, 2007

Ben Around
The Block Design
665 Third Street
San Francisco CA 94108

Hello Ben,

This is an example of a Merge letter sent directly from JOBZ!

First, I selected a group of people that I wanted to send a message to, including you. The criteria for defining this group can be extremely flexible. For example, I might want to send a printing sample to all my Designers. Then I can narrow this list down, or expand it to include Prospects in the Banking segment.

Then I typed this text, a salutation and signoff, and clicked Print. You (and all the others) are viewing the result. Personalized for you, with my company's letterhead graphics and even my signature. I can also print envelopes or address labels.

Or, using the JOBZ! / Email integration capability, I could eliminate the paper and send an individual email to each recipient.

Finally, the contact history field of each recipient is updated with the date and subject of this memo, so I can later be reminded of what I sent to whom, and when. I can even schedule follow-up phone calls to remind me later to have a conversation about it with each recipient.

Thanks,

Jimmy Buffett
Carpe Data

February 25, 2007

Seymour Hickies
One.com
665 Third Street
San Francisco CA 94108

Hello Seymour,

This is an example of a Merge letter sent directly from JOBZ!

First, I selected a group of people that I wanted to send a message to, including you. The criteria for defining this group can be extremely flexible. For example, I might want to send a printing sample to all my Designers. Then I can narrow this list down, or expand it to include Prospects in the Banking segment.

Then I typed this text, a salutation and signoff, and clicked Print. You (and all the others) are viewing the result. Personalized for you, with my company's letterhead graphics and even my signature. I can also print envelopes or address labels.

Or, using the JOBZ! / Email integration capability, I could eliminate the paper and send an individual email to each recipient.

Finally, the contact history field of each recipient is updated with the date and subject of this memo, so I can later be reminded of what I sent to whom, and when. I can even schedule follow-up phone calls to remind me later to have a conversation about it with each recipient.

Thanks,

Jimi Hendrix
Carpe Data

February 25, 2007

Serge Protector
Database Testing, Inc.
1740 Technology Dr. Suite 100
San Francisco CA 94108

Hello Serge,

This is an example of a Merge letter sent directly from JOBZ!

First, I selected a group of people that I wanted to send a message to, including you. The criteria for defining this group can be extremely flexible. For example, I might want to send a printing sample to all my Designers. Then I can narrow this list down, or expand it to include Prospects in the Banking segment.

Then I typed this text, a salutation and signoff, and clicked Print. You (and all the others) are viewing the result. Personalized for you, with my company's letterhead graphics and even my signature. I can also print envelopes or address labels.

Or, using the JOBZ! / Email integration capability, I could eliminate the paper and send an individual email to each recipient.

Finally, the contact history field of each recipient is updated with the date and subject of this memo, so I can later be reminded of what I sent to whom, and when. I can even schedule follow-up phone calls to remind me later to have a conversation about it with each recipient.

Thanks,

Jim Taylor
Carpe Data

Each letter is signed by the assigned Sales Rep. Or, if you like, by the Sales Rep's manager.

ADDRESS: Merge Mail Capabilities

Build a found set of contacts by category, then send each of them a letter, or post card, or email.

5 x 7 Postcards

4 x 6 Postcards

Easily print out mailing labels in standard office supply store formats.

Labels

#10 Envelopes

Allen Wrench
Buffalo Rome
18338 Las Cumbres Road
Los Gatos CA 95033

Receiving- Clan Tech
Clan Tech, Inc.
18338 Las Cumbres Road
Los Gatos CA 95033

Don Dadudun
Clan Tech, Inc.
18338 Las Cumbres Road
Los Gatos CA 95033

Les Billings
Claymore Information Systems
18338 Las Cumbres Road
Los Gatos CA 95033

Paige Downe
Claymore Information Systems
18338 Las Cumbres Road
Los Gatos CA 95033

Paige Upp
Claymore Information Systems
18338 Las Cumbres Road
Los Gatos CA 95033

Sarah Bellum
Client, Inc.
18338 Las Cumbres Road
Los Gatos CA 95033

Greg Gorian
Client, Inc.
18338 Las Cumbres Road Suite
300
Los Gatos CA 95033

George Gorian
Client, Inc.
18338 Las Cumbres Road Suite
300
Los Gatos CA 95033

Les Izmor
Client, Inc.
18338 Las Cumenta Road
Las Cumenta CA 95033

Morris Less
Client, Inc.
18338 Las Cumbres Road
Los Gatos CA 95033

Donatello Nobatti
Client, Inc.
18338 Las Cumbres Road
Los Gatos CA 95033

Cody Pendant
Client, Inc.
18338 Las Cumbres Road
Los Gatos CA 95033

Roger That
Client, Inc.
18338 Otro Cumbres Road #12
Lakewood CA 95033

Noah Vale
Client, Inc.
18338 Las Cumbres Road
Los Gatos CA 95033

Cary Itaround
Client, Inc. Receiving
18338 Las Cumbres Road
Los Gatos CA 95033

Megan Whoopie
Cursory Software
18338 Las Cumbres Road
Los Gatos CA 95033

Lois Bidder
Database Testing, Inc.
123 Different Street
Brentwood CA 90367

Lance Boyle
Database Testing, Inc.
18338 Las Cumbres Road MS
43ed
El Cerrito HI 95033

Max Clearance
Database Testing, Inc.
7525 SE Lake Road #12
Milwaukie OR 97267

www.carpedata.com

ADDRESS Sales Management

Go To Organize New... Actions = 5 / 23 = << < > >> Find... HELP

Address Manager Screen

Company Database Testi

Name Rich Text

Designer
408 395-8183 x123
1999 S. Bascom Ave. Suite 700
Campbell CA 95008
pressok@yahoo.com

Assigned Sales Rep: Jim Taylor

Region Northern California

CSR

Category Account

Temperature Target

Manager Temperature Red

Rich Text's Coworkers and Assigned Reps

Steve Austin	Jim Taylor
Lois Bidder	Jim Taylor
Robin M. Blind	Jim Taylor
Lance Boyle	Jim Taylor
Max Clearance	Jim Taylor
Jimmy Buffett	Jim Taylor
Phil N. Goode	Jim Taylor
Richard Head	Jim Taylor
Tim Iddley	Jimmy Buffett
Amber Lith	Jim Taylor
Ruby Lith	Jim Taylor
Rhoda Long	Jimmy Buffett
Di Lux	Jim Taylor
Aart Major	Jim Taylor
New Name	Jim Taylor
Accounts Payable	Jim Taylor
Al Payslo	Jim Taylor
Jean Pool	Jim Taylor
Serge Protector	Jim Taylor
Susie Queue	Jim Taylor
Jonathan A.	Jonathan
Receiving	Jim Taylor

Entertain Account Challenges, Reassign Accounts.

Manager's own category

Keep private Manager notes, and monitor selected contacts.

History Challenge Segments Campaigns Housekeeping Budget Account Lists

Number of Contacts: 165

Days Since Last Contact: 0

Last Contact 10/28/2011

What Good Conversation

Comment Encouraging

Next Contact 11/4/2011

What Check in

Why Get a chance to quote

Contact History

10/28/2011 10:49:44 AM JT: Good Conversation Encouraging

5/25/2011 7:29:51 AM JT: Get meeting Dismissing a contact-origin toDo from the ToDo list

5/1/2011 6:43:15 PM JT: Left Voice Mail Requested info

5/1/2011 6:11:34 PM JT:

Budget \$407,500

YTD \$102,529

Last Year \$28,412

Manager's Private Notes

Keep an eye on this contact- may need to be reassigned.

Monitor This Contact > X

List Monitored Single Contact Report

Sales Rep's Manager as set in Personalization: Jim Taylor jim@carpedata.com

JOBZ!

A systematic approach to active account maintenance.

Go To Organize **New...** Actions = 3 / 9 = << < > >> Find...

Address Manager Screen

Company: **One.com**
Assigned Sales Rep: **Jimi Hendrix**
Name: **Art Major**
Region: **Pacific Northwest**
665 Third Street Suite F
San Francisco CA 94111
pressok@yahoo.com
CSR:
Category: **Prospect**
Temperature: **Target**
Manager Temperature: **Red**

Entertain account Challenges

History Challenge **Segments** Campaigns Housekeeping Budget Account Lists

☒ Challenged

Challenged By: **Jimmy Buffett**
Challenge Date: **10/28/11**
Review Date: **1/26/12**
Clear

List Challenged
Challenge Notice
Print Challenge List

Promote active account maintenance.

To reassign single contacts to a new sales rep, simply change the name of the Assigned Sales Rep above. To reassign contacts en masse perform a Find, and proceed to the \$ List view; verify the correct contacts are listed.

Reassign accounts en masse.

Go To 1 / 8 << < > >> Organize **New...** Actions Output Find... HELP

Segment View Date View **\$ View** Clear X Find Select X X All [Prepare to Reassign Accounts](#)

Company	Name	Modified	Select X	Category	Temp.	Sales Rep	Budget	YTD	Last Year	12 Months
Eight, Inc	Billy Rubin	408 395-8183	☒	Account	Annual	Jim Taylor				Reassign 8
Garden Supply	Sal Monella	408 395-8183	☒	Account	Cool	Jimi Hendrix				
One.com	Art Major	408 395-8183	☒							
The Block Design Group	Ben There	408 395-	☒							
The Block Design Group	Chip Offah	408 395-	☒							
Eight, Inc	Accounts Payable	408 395-8183	☒							
Cameloid Concepts	Al Pacca		☒							
American Imaging Solutions (AIS)	Tim White	508-242-0000	☒	Suspense		Jimi Hendrix				

10/28/11 11:30:41 AM JOBZ!

Reassign All

Assign all 8 contacts in the found set to this rep: Jim Taylor

Cancel OK





The Shark List

- Answers the question: Is anybody calling on...?
- Enables the question: Can I call on them instead?
- Encourages competition for accounts.

Go To

JOB	ADDRESS	MEMOS	EXPENSE
Back			
Back To Job			
Home			
Bookmarked Place			
List	= 1 / 8 Billy Rubin - Eight, Inc		
Friday, October 28, 2011			
To Do	...	Delegated To Do	
		Due	Done
rubin		10/28/11	☐
duty after installation.			
o list (PDF? xlsx?)		10/20/11	☐
			☐
1 (Budgeting etc)			☐
			☐
Manager			
management demo video			

The Shark List: Keep the waters churning

Done **Shark List: Who calls on...?** **SEARCH**

MANAGER [Request a Challenge](#)
[Show Challenges to You](#)

The List **The Rules**

DISPLAY / REFRESH LIST

Click into list and scroll to view. Blanks may be present in Search results.
Field order is: Company - Parent Co - Name - Category - Sales Rep. Sorted by company.

Apple Music - - Maxwell Hammer - Prospect - John Lennon

Apple Graphics - - Kevin Polley - Prospect - Jim Taylor

You can inquire by company or contact name.

This will display the entire list of Assigned Accounts and Prospects, and who the assigned rep is.

The Manager's view includes the \$ amount of recent (12 mo) sales.

The List	The Rules
DISPLAY / REFRESH LIST	Click into list and scroll to view. Blanks may be present in Search results. Field order is: Company - Parent Co - Name - Category - Sales Rep. Sorted by company.
Traid Group - - Jenny Hale - Prospect - Johnny Davila Trend Offset Printing - - John Hoffheins - Prospect - Jim Taylor Trend Offset Printing - - John Bryant - Prospect - Jim Taylor Tucker Castleberry Printing - - Jan Lego - Prospect - Jim Taylor Tucker Printers - - Craig Reynolds - Prospect - Jim Taylor Turner Associates - - Steven Turner - Account - Jim Taylor Tursack, Inc. - - Scott Thorell - Prospect - Jim Taylor TWB / Chiat - - Kerri Krebs - Prospect - Johnny Davila Two, Inc. - - Neal Downe - Account - Jerry Garcia Two, Inc. - - Matt Board - Prospect - Jerry Garcia Two, Inc. - - Liza Round - Prospect - Jim Taylor Two, Inc. - - Dot Matrix - Account - Jerry Garcia UCSD Graduate Student Housing - - Bryn Taylor - Prospect - Jim Taylor United States of America - - Barack Obama - Prospect - Jim Taylor University of Colorado - - Diane Adams - Account - Jim Taylor	

The Shark List: Account Challenge

Done **Shark List: Who calls on...?** Apple **SEARCH**

MANAGER

[Request a Challenge](#)
[Show Challenges to You](#)

The List **The Rules**

DISPLAY / REFRESH LIST

Click into list and email to view. Blanks may be present in Search results.
Field order is: Company - Product Co - Name - Category - Sales Rep. Sorted by company.

Apple Music - - Maxwell Hammer - Prospect - John Lennon
Apple Graphics - - Kevin Kelley - Prospect - Jim Taylor

These questions are also available on the contact's Strategic Account Profile, accessed on the Company tab. (next slide)

This generates an email to the manager, with list of questions:

The manager then decides whether or not to entertain the challenge, and if so, records it on the Sales Management screen, sets a date for review, and notifies the current rep by email. This message then appears on the contact's input screen:

Challenged!
Review
9/8/2009

Company Name:
Primary Contact:
Why this Account Should Be Assigned to Me:
Describe Our Current Relationship with this Company:
Company's Annual Sales: \$ Fiscal Year End Month:
Describe the Company's Industry & Marketplace:
Number of Employees:
Names of Divisions:
Number of Facilities & Locations:
Major Products & Recent Product Introductions:
Products & Services We Offer That They Need:
Their Annual Spend in these Segments: \$
Our Potential Annual Sales: \$
Where is their Pain?
Who is Our Competition?
What is Their Incentive to Change Suppliers?
Ease of Implementation:
Seasonality of Work:
Profitability of Work:
(etc.)

Strategic Account Profile

JOBZ!

Contacts	Segments	... Regional	Company	Links	Codes
----------	----------	--------------	---------	-------	-------

Web Site
www.carpedata.com

Parent Co.	FY End	# Employees	SIC
Carpedata.com	Jan	25,000	455454

Annual Sales	Year Estab.
50,000,000	1950

Click [here](#) to set all contacts in company with **common** fields and to create a NEW Company Level Strategic Account Profile.

Strategic Account Profile

Company Name: Database Testing, Inc.

Established 1950

Sales Rep: Jim Taylor

Our Current Relationship with this Company: Very little

Company's Annual Sales: \$50,000,000

Fiscal Year End Month: Dec.

Company's Industry & Marketplace: Computer Manufacturer SIC: 455454

Number of Employees: 25,500

Names of Divisions: Services, Printers, Computers

Number of Facilities & Locations: About 12, worldwide

Major Products & Recent Product Introductions:

This screen helps a sales rep to approach a prospect in a professional manner, with forethought, displaying knowledge of the prospect's needs, and how those needs can be met with your company's capabilities.

Describe Our Current Relationship with this Company:
 Company's Annual Sales: \$ Fiscal Year End Month:
 Describe the Company's Industry & Marketplace:
 Number of Employees:
 Names of Divisions:
 Number of Facilities & Locations:
 Major Products & Recent Product Introductions:
 Recent Financial Performance, Stock Price Trend,
 Mergers & Acquisitions, etc. :
 Top Priorities of CEO:
 Primary Business Objectives:
 Strategies in Place to Achieve these Objectives:
 Critical Success Factors:
 Performance Indicators:
 Issues & Challenges:
 Products & Services We Offer That They Need:
 Their Annual Spend in these Segments: \$
 Our Potential Annual Sales: \$
 Where is their Pain?
 Who is Our Competition?
 What is Their Incentive to Change Suppliers?
 Ease of Implementation:
 Seasonality of Work:
 Profitability of Work:
 Sales Cycle, Accelerators:
 Org Chart (Formal) and Informal (Political):
 Short Term & Long Term Goals for this Account:
 Team & Resources Needed, Management Participation Required:



Business Letter Templates

Go To		NEW TEMPLATE	List All
Templates are shared by all. Anyone can "Use" a template as well as create, edit or delete them.			
Subject	Modified	Text	
Introductory Letter; Folding Cartons	10/28/2011 4:06:26 PM	We are pleased to announce the grand opening of our Folding Carton Division.	▲ ▼ Use Edit
Introductory Letter	10/28/2011 4:06:13 PM	This is to introduce our company. To begin, I selected a group of people that I wanted to send a message to,	▲ ▼ Use Edit
Follow-up letter	10/28/2011 4:05:49 PM	Thank you for meeting with me the other day. I chose this template from the MEMOS database, and addressed it to you,	▲ ▼ Use Edit
Cover Sheet	10/28/2011 4:05:35 PM	Thanks for your interest in our company. Please review the accompanying materials for more information.	▲ ▼ Use Edit

Compose, or hire a professional writer to compose, standard business letters that any of the sales reps can use when they need to correspond with a prospect.

A sales rep simply clicks Use, then addresses the letter, and prints it out.

It's a Win - Win

- Self Management is the origin and philosophy of JOBZ!
- Sales Management applies the same tools & skills to a larger data set.
- Communicate your expectations. Share this presentation with Sales.
- Thanks for using JOBZ!

What's good for the goose, is
good for the gander.

