

# Sales Force Automation to Boost Sales Productivity & Performance

Building materials companies run on layered dealer and distributor networks where secondary sales, scheme-led demand, and territory-based field coverage drive revenue execution. Sales leaders are under constant pressure to improve coverage vs. potential, raise productivity per salesperson, deepen dealer penetration, and close market visibility gaps — while managing high SKU complexity, regional design variation, and mixed retail-project sales cycles. Field reps must engage dealers, exclusive showrooms, and influencers such as architects, masons, and contractors —yet often lack real-time visibility into dealer purchase history, inventory positions, scheme status, or outstanding balances. The result is uneven visit quality, reactive coverage, and unreliable forecast inputs despite heavy field effort.

## Current Field Sales Challenges



### Reactive Journey & Beat Planning

Field visits are driven by habit and static beat plans rather than dealer performance signals or opportunity triggers.



### No Pre-Visit Dealer Intelligence

Reps lack ready context on dealer purchase trends, fast-moving SKUs, scheme eligibility, and outstanding balances before meetings.



### Limited Field Mobility & Legacy Tools

Desktop-heavy systems and slow applications restrict on-site usage and reduce in-market responsiveness.



### Manual Reporting & Activity Capture

Visit notes, attendance, and demand updates are captured inconsistently or after the fact.



### Fragmented Appointment & Follow-Up Tracking

Scheduling and follow-ups are managed through personal methods without structured tracking or distance awareness.



### No Structured Pre-Journey Planning (PJP)

Managers lack forward visibility into monthly and weekly visit plans and cannot course-correct coverage early.



### Connectivity Constraints in Field Locations

Many territories include low-network zones where systems fail or slow down.

## Build an Intelligent Sales Engine

The transformation shifts field sales from a manually reported, static beat model to a data-guided, assisted execution model.

Instead of relying on rep memory and after-visit updates, sales execution becomes structured at the point of activity. Visit planning is defined in advance, manager-reviewed, and dynamically adjusted. Dealer meetings are supported by contextual insights such as purchase history, scheme status, SKU movement, and outstanding exposure, thus enabling meaningful conversations. Demand capture, appointment tracking, and activity logging occur in real time, including in offline scenarios, and synchronize automatically when connectivity returns.

### Capabilities

#### Mobile Field Execution Layer

Structured visit capture, attendance logging, geo-tagged activity, and on-site data entry from any territory.

*Impact: Higher sales person productivity per day*

#### Pre-Journey Planning & Visit Intelligence

Monthly and weekly PJP with manager approvals, route discipline, and forward visit visibility.

*Impact: Better territory coverage and dealer penetration depth*

#### Sales Activity Tracking & Manager Visibility

Real-time dashboards of visits, activities, and field coverage for sales leadership.

*Impact: Stronger forecast reliability and performance monitoring*

#### Guided Demand & Opportunity Capture

On-site structured demand creation with validated accounts and SKU selection.

*Impact: Faster demand capture and reduced order errors*

#### Scheme & Product Context

Active schemes, product priorities, and fast-moving SKUs surfaced at the time of engagement.

*Impact: Improved scheme ROI effectiveness*

#### Dealer & Influencer 360 Context

Unified dealer, influencer, scheme, outstanding, and purchase trend context available before and during visits.

*Impact: Higher dealer wallet share and better cross-sell accuracy*

## AI for Next-Gen Sales Engine

With structured field activity and dealer data in place, an intelligence layer enhances sales productivity and performance:

- ✓ AI-assisted journey planning based on dealer potential and sales signals
- ✓ Dealer prioritization using purchase and engagement patterns
- ✓ Next-best conversation topics based on scheme and SKU movement
- ✓ Trigger-based revisit alerts for sales drop or inactivity
- ✓ Opportunity scoring to guide rep focus

### Take the First Step

Alletec is a Microsoft AI Business Solutions partner that brings deep industry-tested experience in modernizing sales and channel operations for building materials companies. With proven capabilities across dealer platforms, sales force automation, showroom management, and core process modernization, Alletec helps organizations shift from traditional field operations to connected, intelligence-driven sales operations.

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