

A photograph of two men standing outdoors, looking at a tablet held by the man on the left. The background shows a residential area with houses and a fence. The image is overlaid with a semi-transparent grey layer where the text is placed.

Door-to-Door and Field Sales Apps: The Buyer's Guide

How to evaluate and purchase the best tech
investment for your sales teams

The Buyer's Guide

Overview	01
How can you prepare for this upgrade?	02
How can you recognize the best option?	02
They Care About Your Success	03
They Have Experience and Resources	04
They Earn Your Business	04
They'll Challenge You	05
They Know the Industry	05
CONCLUSION	06

Overview

If you're in a sales organization, **you have to invest in tech.** It's good that you're currently researching that step-sales apps and software drastically cut costs and optimize your processes.

We're here to help you through the rest of the decision-making process. We make the leading field sales enablement app, so we have some authority on the topic. We're also a little biased. That said, we care about members of the field sales community, and have done our best to create this guide to serve them.

This won't be a feature comparison between SalesRabbit and the other apps out there. Instead, we've focused on principles that companies should follow when purchasing a field sales app. These principles are based on our many years of selling and implementing SalesRabbit with thousands of customers.

As you begin your search, here's a simple acronym reminding you that you should **CHECK** and be sure that each company:



How can you prepare for this upgrade?

First things first: you've **got to be committed to investing in tech.**

We're familiar with most of the highly successful companies in field sales. Some of them are our customers, and some of them aren't. But we don't know a single one that isn't leveraging technology generally, and using a field sales enablement app specifically.

Yes, they take money and time to buy and use. But the most successful field sales organizations all recognize that the return on this investment is enormous. In fact, research has shown that the [average CRM returns \\$8.71](#) for every dollar you spend.

Using a field sales enablement app won't by itself make you successful; but we can promise you'll be a lot more successful with one than without.

Once you're committed to this investment, reach out to friends and colleagues in the industry and ask them which apps they'd recommend looking at. Then, schedule demos with at least 3 providers over a 1-2 day period of time so that you can compare them.

When you reach out to these providers to learn more about their product, **be prepared to discuss your current sales process** so that you can accomplish the right objectives with your door-to-door or field sales app purchase.

You should specifically have in mind your current performance, short and long-term company goals, and current data-collecting procedures. If a company **does not ask** about your current sales process, then they obviously don't have much interest in your core needs. Companies like these don't plan on making a continued investment in you - they just want you to download their product and figure things out on your own, which isn't going to give you good results.

Make sure the company you are working with has a specific, time-based plan for your interactions with them, particularly in the first few weeks after your purchase.

Prepare your teams for change. If you're going to get better sales results, then things are going to have to change at every level of your sales organization. Buying technology without changing processes is a surefire formula for failure. You will have to be open to a new approach that requires you to build new leadership habits and perspectives.

The same is true for your managers and reps: inform them that the new app or software will require behavioral changes on their end. You should also be open to including them in the process by figuring out problems that they are encountering (either through 1:1 conversations, surveys, etc.) and then keeping them in mind as you are considering different software options.

This will help them feel like active participants in your decision and get them excited for the improvements the entire company will see as a result of the adjustments you're asking them to make.



How can you recognize the best option?

You're investing in a **SaaS** (Software as a Service) company, not just an app. Because of this, make sure that you understand their actual service. Here are the things you should be asking about:



They Care About Your Success

Does the provider have a thorough onboarding program? This is the best indicator that a provider cares about your company. You may want to just download the app and get rolling quickly, but if a company allows you to do this, they're allowing you to set out on a course that won't get you the results you want.

A real, effective onboarding will get a clear picture of your current situation-- processes, sales figures, goals, etc. Then it will help you decide which changes will be most profitable to target and help you develop **a plan to make that happen**.

Of course, they will also show you how best to use the app, but only in the context of the big-picture strategy that you are developing together.

And it shouldn't end there. After the initial onboarding, they should continue to invest resources in your improvement. They should train you not only in getting better at using their app, but at selling in general.

You also want to make sure that the company is ready to train different employee types on app functionality. A sales rep is going to use the app differently than an executive, but it's important for them to both use the app well and in a way that caters to their responsibilities and enables them to **accomplish their unique roles easier**.

Take area management, for example. An executive can use app information (like DataGrid) to strategically select high-target areas that are prime locations for their offering. Then, a field manager can use the app to map out and assign areas for reps without confusion or wasting time. Then, the rep can use the maps and lead-dispositioning options to strategically track their work within that area and **make more informed decisions with their canvassing**.

They Have Experience and Resources

It's important for a provider to have experience as a provider. That way they'll be able to help any client, no matter the size. As clients grow, their needs change and evolve. For example, a small company of two or three employees wouldn't really have any need for creating different permissions among different levels of the company. But as you grow and start hiring reps and managers, the need for different app permission levels will become paramount. This will also be true for other features, such as leaderboards. A couple of reps can hold a competition pretty easily when it's just the two of them. But when you've got different regional offices with hundreds or thousands of reps, you will need a very **comprehensive and customizable leaderboard and reporting system**.

You might be worried about all the adjustments you'll have to make as you grow. The nice thing about working with a developed door-to-door software company is that they have experience guiding companies through this process, meaning they can help you anticipate and solve problems before you even experience them.

You should also ask if the provider is growing. Are they consistently updating their service? Where are they investing their resources? If a company has more salesmen than it does developers, that says something about what they're after-- **quick, easy profit**.

Smarter companies recognize that the best way to create and keep customers is to make their lives easier. They will constantly improve their product based on the communications they're receiving from their customers. They're more worried about hearing and building than they are about telling and selling.

This means their product will also be more stable and secure. There are a few key metrics that will indicate this: what is their crash-free user rate? A provider should have that number readily accessible to you and **be ready to answer that question**.

You can also tell a lot about a provider's stability by the clients they work with. Someone who has a lot of small clients may not be very stable, but someone who works with at least a few large clients or more complex use cases needs to be.

They Earn Your Business

You want to know that the provider is determined to build a healthy relationship with their customers. A major indicator here will be the quality of their support staff. If you're going to make an adjustment that potentially affects every member of your company, you want to have a support system that is accessible, personable, and helpful for everyone. You also want this to always be true. You might get a lot of early attention that wanes over time as a provider gets over the initial excitement of having you as a customer. As mentioned earlier, if a provider has a long-term plan for you and is interested in helping you set goals and make improvements, then that's evidence that they're going to be willing to help you resolve issues with their program. Ask about their customer satisfaction score - if they can't tell you what it is, that's a red flag.

What do their reviewers say, particularly within the last year or so? Obviously you want to learn about the experiences customers are having with the company. You can look at the reviews posted on the App Store or Google Play, though those may not always represent a complete picture of the provider's user base. There are also review sites like G2 Crowd or Capterra that will give you an insight into customer's relationship with the company.

It's also important to pay attention to the way the company responds to its reviews, especially negative ones. No company has a flawless product or a perfect relationship with everyone they work with. But if they're trying to improve those relationships and their product based on the needs of their customers, you can place trust in the character of the company and its willingness to meet your needs.

They'll Challenge You

As you make this upgrade, it's best to be open to making changes in your company. Of course, this also means you should know where you are now and be prepared to discuss your current situation. Don't be opposed to a little opposition-- the best providers will challenge you to make changes and improve, instead of simply reinforcing your current behaviors, good or bad.

Every mobile sales app ought to give you a better representation of what's happening at your company by providing you with data points associated with all your major operations. That should come standard.

The great companies will go above that-- for example, instead of enabling you (and even showing you in their app) how to track leads, they'll help you learn top-level lead tracking strategies.

Beyond that, they can show you how lead tracking is an integral part of a much larger sales strategy, and they'll help you develop one of those, too. All of their features should contribute to a much larger purpose and strategic framework, not just entice you into buying the product.

They Know the Industry

Does the provider have experience in your industry? Does that experience show in their product? Are they active participants in the industry community?

Obviously their ability to build an effective app is dependent on their ability to **understand your needs and the challenges of the industry.**

These needs are going to change as your company grows and the industry changes. Great SaaS companies are active participants in the door-to-door and field sales community. This enables them to have an insider's view of coming problems and trends-- meaning they can solve problems for you before you even have the chance to recognize them.

A provider's level of industry experience will also be evident in the types of integrations they make available. More legitimate and seasoned software providers will have developed relationships with other companies that make it easy for you to work with both services. **Great services will also be consistently building and updating these integrations** as they become aware of them.

If they really have industry experience they will be able to anticipate the integrations that you will most need, and even be able to recommend new business solutions for you as you grow and expand and encounter new problems. They should also provide you with an API to make new, personalized integrations possible.



Conclusion

Perhaps the best, all-encompassing question you can ask is this: **“Does this software provider think of me only as a customer or as a partner?”**

Forgive us if we’re getting a little repetitive here, but the answer to this question is central to your decision.

A software provider that only considers you a customer will do what it takes to get you onboard, but not much after that. They’ll be willing to significantly discount their product and tell you the things you want to hear, but will be hesitant to make adjustments and updates the serve you later on.

A good partner will want you to succeed just as much as you do and will go out of their way to help make that happen. They’ll challenge you, they’ll push you to be better, and they’ll give you the tools to do it. They’ll want to learn about your situation, your problems, and your needs, and cater their approach to resolve those issues. This approach will set them apart from their competitors more than anything else.

We hope that you now feel better equipped to recognize the best service for your company. To continue learning more about our product and our approach, **send us an email, sign up for our content updates**, or give us a call @ **(801) 341-2569**.

