

The MOBILE WORKER Cheat Sheet

11 Hacks to Get Your Customer Data on the Go

1. **No access to Infusionsoft data outside the office?**

Access everything from your mobile device with Swyft Mobile.

As an on-the-go worker, you're helpless without your sales & customer data. No contact information. No sales history. No appointment times. You could keep it all scribbled on paper, or saved in several different apps – but without access to Infusionsoft, you can't do your job effectively. Plus, if you have to call the office constantly, that's costing you time and money.

Swyft Mobile gives you instant, anywhere-access to Infusionsoft from your mobile phone or tablet. So you always have the most up-to-date info, whenever and wherever you need it.

2. **Constant schedule changes? Always calling the office?**

Swyft puts team calendars at your fingertips, updated in real-time.

There's nothing more frustrating than finding out your schedule has been changed – after you're already on the road! For many mobile workers, this happens several times a day. You have to keep calling the office for updates, over and over. This is not efficient or reasonable!

With Swyft Mobile, you'll have mobile access to your team's schedules and calendars, updated in real time.

3. **Wasting time going to cancelled appointments?**

Always have the latest appointment times, synced with home base.

Sound familiar? Headquarters gives you a printed schedule in the morning. You hit the road for your appointments. But by the time you get there, you find out the appointment time has been changed. This is a waste of valuable time! And it makes you look bad in front of customers.

With Swyft Mobile, you can kiss those faulty printed schedules goodbye. You'll have 24/7 access to all your Infusionsoft appointments, right from your phone. Any appointment changes are updated in real-time, so you always know what's happening.

4. **Can't schedule customer follow-ups on the spot? Have to call them later?**

Check team availability in real-time. Schedule appointments instantly.

You're meeting with a customer and need to schedule a follow-up appointment. But without access to team schedules, there's nothing you can do. You need to call the customer back later. Once again, this is inefficient and just looks bad!

Swyft Mobile lets you view all schedules and team availability in real-time, right from your

phone. And you can schedule your follow-up appointments on the spot.

5. Can't close sales without customer signatures?

Swyft lets customers sign electronically, right on your mobile device.

You've just landed a sale, but you can't close the deal until you get the customer's electronic signature. That means you'll need to email them later – and by then, who knows what could happen?

Don't lose the sale! Collect electronic signatures on the spot with Swyft Mobile.

6. Field reps still collecting information on paper?

No more lost notes & chicken scratch. Enter it electronically, from anywhere.

Nobody likes dealing with handwritten notes – not you, your reps or the office. Those notes are unreliable, often illegible and prone to errors.

With Swyft Mobile, you can eliminate the need for paper notes. Enter everything into the mobile app. Save and sync instantly with Infusionsoft, so your entire team has access from every device.

7. Field reps entering the day's activity from their notes?

Swyft lets them enter it immediately, while they're on the go, reducing errors.

If your reps are entering a full day's worth of notes at the end of the day, you can bet they're losing a lot of info. You can't blame them – this is an extremely inefficient and faulty process.

By enabling reps to enter data immediately into Swyft, from anywhere, you reduce the chance of errors and forgotten info. Plus, home base can access that data instantly.

8. No real-time visibility of local customers and prospects?

See it all on a map display; manage territories; track hot leads, assign reps in real-time.

When you and your reps are out in the field all day, it's impossible to keep track of all activity – until now.

Swyft Mobile enables you to track all customer activity and rep activity in real time, right from your mobile device. A map display makes it even easier to manage territories, see the hottest leads and re-assign reps on the spot.

9. Unable to update activity or opportunities from the field?

Don't return to home base. Use Swyft to enter & access data on the go.

When you don't know what your reps are doing in the field, you can't react. You can't make decisions that will aid your team or benefit the business.

With Swyft Mobile, you have visibility into all activity, right at your fingertips. No need to constantly call reps or check back with the office for updates.

10. Home base doesn't know where field reps are?

Get real-time access to individual or team calendars, synced across all devices.

Does the office have no real-time access to individual or group calendars? Without that information, it's too easy to lose track of reps completely when they're out in the field. And if they're not hitting the right prospects and customers, you may not find out until the day is over.

Swyft gives the office real-time visibility of everything happening in the field.

11. Don't have access to reporting?

Access key metrics and analytics, in real-time, no matter where you are.

Which prospects are converting and where? Which reps are producing the most sales? What activities are generating the most results? If you don't have real-time access to this data, then you're missing out on opportunities to grow profits. You're missing the big picture!

Swyft Mobile gives you real-time access to reporting, so you can see how the business is doing, right from your phone.

Integrate Swift Mobile with Infusionsoft Today

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