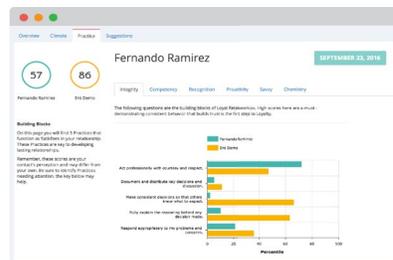salesE**Q**UITY

Start Planning, Executing, and Tracking Your Client Engagement with Trusted Advisor Action Plans

Trusted Advisor Action Plans (TAAP) is a client-centric feature on our platform that helps account teams create and track S-M-A-R-T goals, which focus on improving specific behaviors that impact your relationships. These behaviors matter because they affect the health of your relationships, and their retention and revenue growth.

Identify Strengths and Weaknesses

Identify the strengths and weaknesses of every relationship and build your TAAP plans on the focus areas that matter most to them and you.
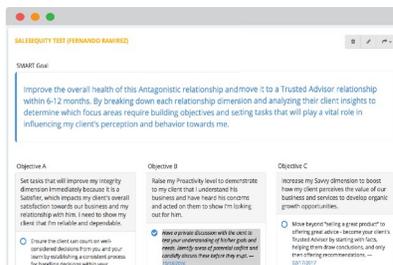
Create S-M-A-R-T Goals

Create S-M-A-R-T goals that align our relationship assessment insights with your client engagement goals to guide your relationship success.

Build Tasks to Help Achieve Objectives

Build and assign the right tasks that sync with your plans objectives and help you execute with precision and drive maximum value.
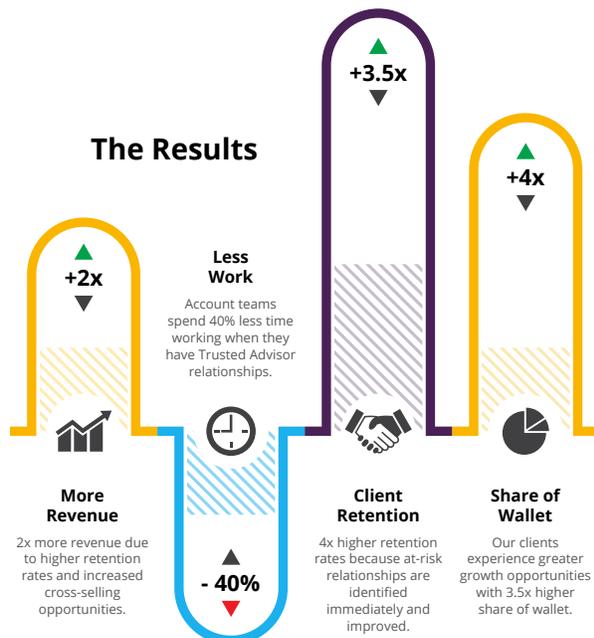
Integrate TAAP Plans to Your CRM

Integrate your TAAP plans with your CRM or calendar to manage your objectives and tasks effectively without missing a beat.

How We Will Impact Your Business

salesEQUITY empowers B2B client teams to transform their client relationships into drivers of organic growth faster and more affordably than any sales training program by:

- **Measuring 1-to-1 client relationships** with annual or Moment of Truth (MOT) surveys.
- **Delivering real-time analysis on accounts** to identify undervalued and overvalued relationships.
- **Coaching behavior change** with actionable tactics and account planning tools.

The Results

+3.5x

+4x

+2x

Less Work

Account teams spend 40% less time working when they have Trusted Advisor relationships.

- 40%

More Revenue

2x more revenue due to higher retention rates and increased cross-selling opportunities.

Client Retention

4x higher retention rates because at-risk relationships are identified immediately and improved.

Share of Wallet

Our clients experience greater growth opportunities with 3.5x higher share of wallet.

Learn More About Our Platform

Our platform features highly-customizable modules, in an easy-to-use platform, that turns customer feedback into greater sales revenues and boosts engagement through retention

Tell Me More!