

SAM Suite® Features Menu

A customizable **ACTIVITY MANAGEMENT SYSTEM** for Producers and Managers

Synchronizes across Web & APP

	SAMBOARD™	SAMBOOK™	SAM Bundle™
Reporting Features	Daily/Weekly/Monthly/Annual	Annual Reports (Only)	Daily/Weekly/Monthly/Annual
	Current/Last/Quarterly/Rolling	-	Current/Last/Quarterly/Rolling
	Advanced Reports	-	Advanced Reports
	Automatic Emailing	-	Automatic Emailing
	Custom Scheduling	-	Custom Scheduling
	Favorite Reports	-	Favorite Reports
	Leaderboard Reports	-	Leaderboard Reports
	-	Miles/Expense Reports	Miles/Expense Reports
	Hierarchy View (5 Levels)	-	Hierarchy View (5 Levels)
	Rollup Capability	-	Rollup Capability
Coaching Module	Customizable Questions	-	Customizable Questions
	Coaching Grid	-	Coaching Grid
	Last Week's Review	-	Last Week's Review
	Strengths/Challenges/Solutions	-	Strengths/Challenges/Solutions
	Action Plan & Priorities	-	Action Plan & Priorities
	Coaching Journal	-	Coaching Journal
Goal Setting	Quick Goal Setting	Quick Goal Setting	Quick Goal Setting
	Yearly Goals	Yearly Goals	Yearly Goals
	Customizable Goal Profiles	-	Customizable Goal Profiles
	Full Goal Setting Capability	-	Full Goal Setting Capability
	Setting Time Away	-	Setting Time Away
	Skill Ratios & Vital Signs	-	Skill Ratios & Vital Signs
	Aggregate Team Goals	-	Aggregate Team Goals
	Annual Goal Setting	-	Annual Goal Setting
Calendar	-	Appointment Setting	Appointment Setting
	-	Appointment Setting Advancement	Appointment Setting Advancement
	-	Outlook Synchronization	Outlook Synchronization
	-	Google Synchronization	Google Synchronization
Sales Pipeline	-	Name & Referral Tracking	Name & Referral Tracking
	-	Manually Add Names	Manually Add Names
	-	Referral Tracking	Referral Tracking
	-	Manage Appointment Status	Manage Appointment Status
	-	Set Follow-ups	Set Follow-ups
	-	Quick Name Searching	Quick Name Searching
Scorekeeping	-	Status Filtering	Status Filtering
	-	Manual & Automatic	Manual & Automatic
	Quick Score Buttons & Graph	Quick Scoring Buttons & Graph	Quick Scoring Buttons & Graph
	E-Mail Reminders	-	E-Mail Reminders
	Numbers-driven	-	Numbers-driven
Miscellaneous	-	Name/Calendar-driven	Name/Calendar-driven
	-	Hyperlinked Numbers	Hyperlinked Numbers
	Customizable Work-week	Customizable Work-week	Customizable Work-week
	Easy Navigation	Easy Navigation	Easy Navigation
	Analytic Dashboard	Analytic Dashboard	Analytic Dashboard
Investment	Configurable Activities	Configurable Activities	Configurable Activities
	Note Taking	Note Taking	Note Taking
	SAMBOARD™	SAMBOOK™	SAM Bundle™
Investment	\$150 / Year (per user)	\$100 / Year (per user)	\$200 / Year (per user)
	\$15 / Month (per user)	\$12 / Month (per user)	\$20 / Month (per user)

Another Business Management tool by SALES ACTIVITY MANAGEMENT, INC.

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