Dista Sales

Accelerate Conversions with
AI-powered Field Sales Automation.

dista — Google Cloud Partner

Success Metrics

↑ 48%
Lead Allocation & Actioning

↑ 32%
Sales Coverage Enhancement

↑ 26%
Sales Conversion

↑ 25%
Sales Reps Productivity

55K+
Field Assets Managed

150K+
Leads Managed

40+
Customers

Lead Area Definition	Portfolio Management	
Lead Management	Forecast Management	Sales Engagement	Beat Planning	Report Drill Downs
Geo Hierarchy Management	Mobile Office	Contextual Nudges	Incentive Management	
Route Optimization	Quota Management	Custom Reports	Call Logging	Team Overview
Sales Coaching	Custom Integrations	Virtual Chat	Gamification	
Throughput Monitoring	Activity Tracking	Leave Management	Predictive Analysis	Expense Management
Territory Management	Call Masking	Sales Rep Audit Trail	Skillset Management	

www.**dista**.ai | contact@dista.ai
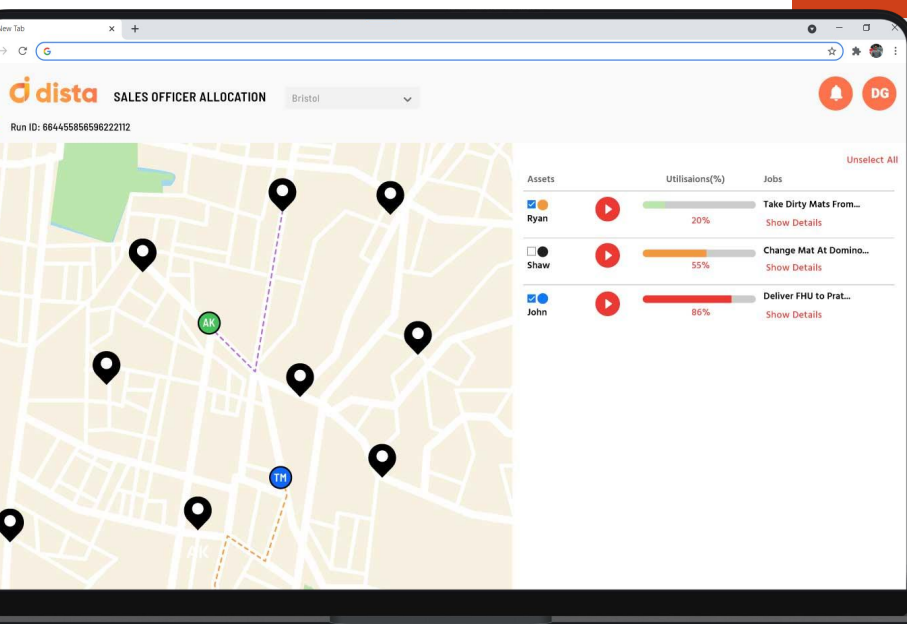
01 Smart Allocation Engine

Allocate timely leads as per skill sets, proximity, and with optimal routes

Key features

→ Auto allocation of leads
→ Routing management
→ Skill set management
→ Business rules defined lead allocation
→ Proximity-based
→ Manual allocation of leads
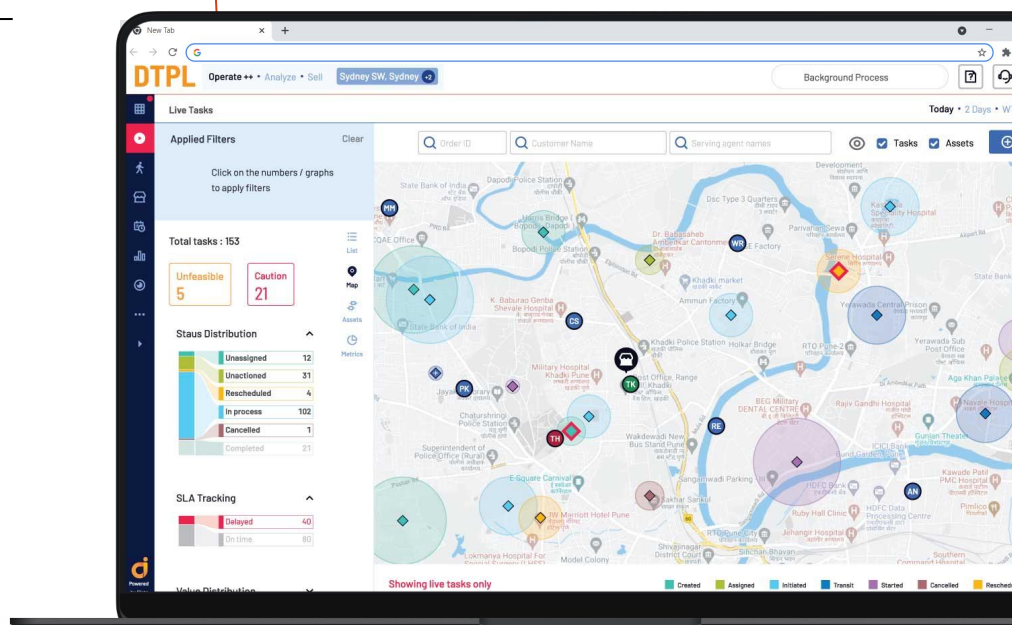→ Capacity Management

02 Field Force Optimization

Optimize your sales resources to expand geographical coverage
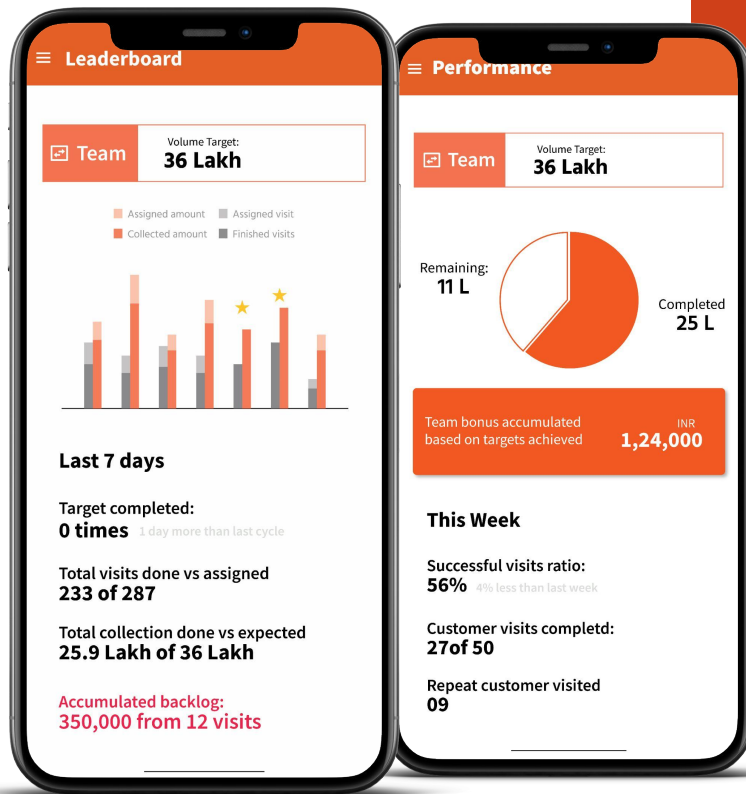
Key features

→ Optimal resource planning
→ Intelligent system suggestions
→ Route optimization
→ ETA details

03 Real-time Insights

Analyze to take proactive measures and boost conversions

Leaderboard

Team — Volume Target: **36 Lakh**

Assigned amount | Assigned visit
Collected amount | Finished visits

Last 7 days

Target completed:
0 times 1 day more than last cycle

Total visits done vs assigned
233 of 287

Total collection done vs expected
25.9 Lakh of 36 Lakh

Accumulated backlog:
350,000 from 12 visits

Performance

Team — Volume Target: **36 Lakh**

Remaining:
11 L

Completed
25 L

Team bonus accumulated based on targets achieved — INR **1,24,000**

This Week

Successful visits ratio:
56% 4% less than last week

Customer visits completd:
27of 50

Repeat customer visited
09

Key features

→ Live field agents' updates
→ Real-time team tracking
→ Dynamic meeting updates
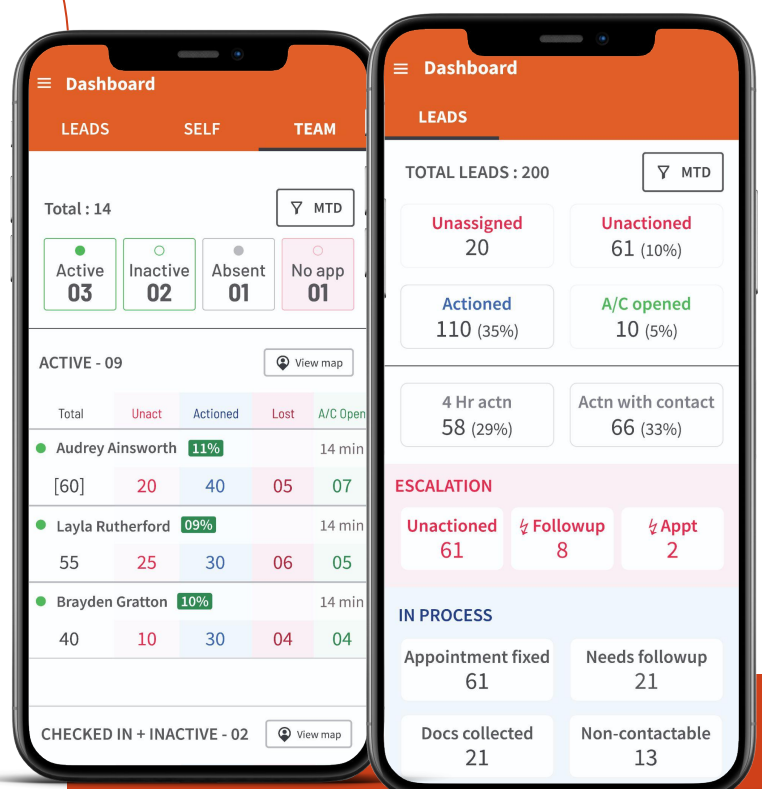→ Nearby leads update
→ Live ETA updates

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04 Mobile Office

A complete on-the-go solution to manage all tasks and operations for field sales executives
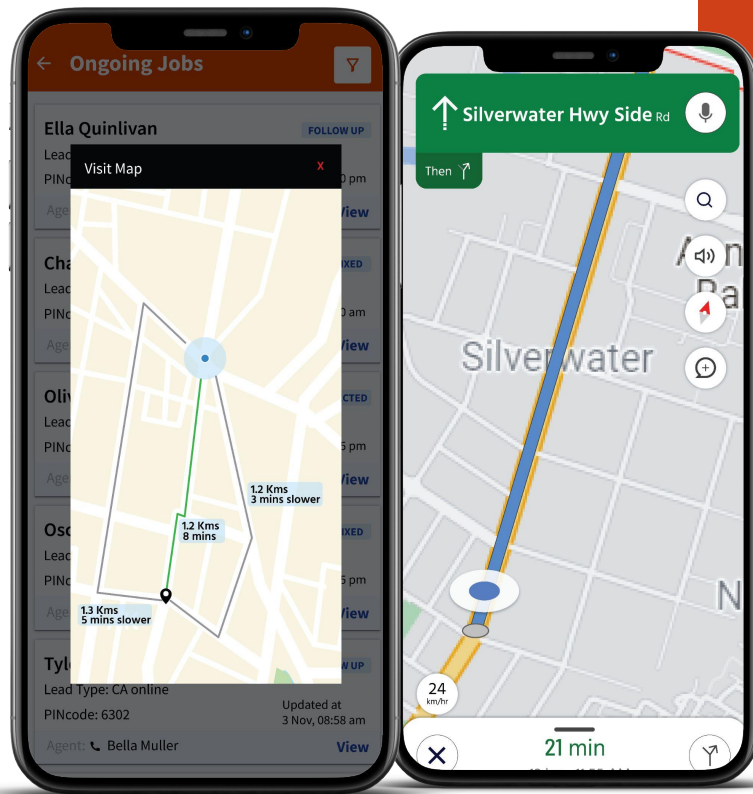
Key features

→ Live status updates
→ Team overview for sales managers
→ Auto/Manual assignment and reassignment of leads
→ Appointment scheduling and rescheduling
→ Lead lifecycle management

Dashboard

LEADS | SELF | TEAM

Total : 14 — MTD

Active	Inactive	Absent	No app
03	02	01	01

ACTIVE - 09 — View map

Total	Unact	Actioned	Lost	A/C Open
Audrey Ainsworth 11%				14 min
[60]	20	40	05	07
Layla Rutherford 09%				14 min
55	25	30	06	05
Brayden Gratton 10%				14 min
40	10	30	04	04

CHECKED IN + INACTIVE - 02 — View map

Dashboard

LEADS

TOTAL LEADS : 200 — MTD

Unassigned	Unactioned
20	61 (10%)
Actioned	A/C opened
110 (35%)	10 (5%)
4 Hr actn	Actn with contact
58 (29%)	66 (33%)

ESCALATION

Unactioned	Followup	Appt
61	8	2

IN PROCESS

Appointment fixed	Needs followup
61	21
Docs collected	Non-contactable
21	13

05 Route Optimization

Guide and track your field workforce through fastest and shortest routes

Key features

→ Dynamic routing
→ Live navigation
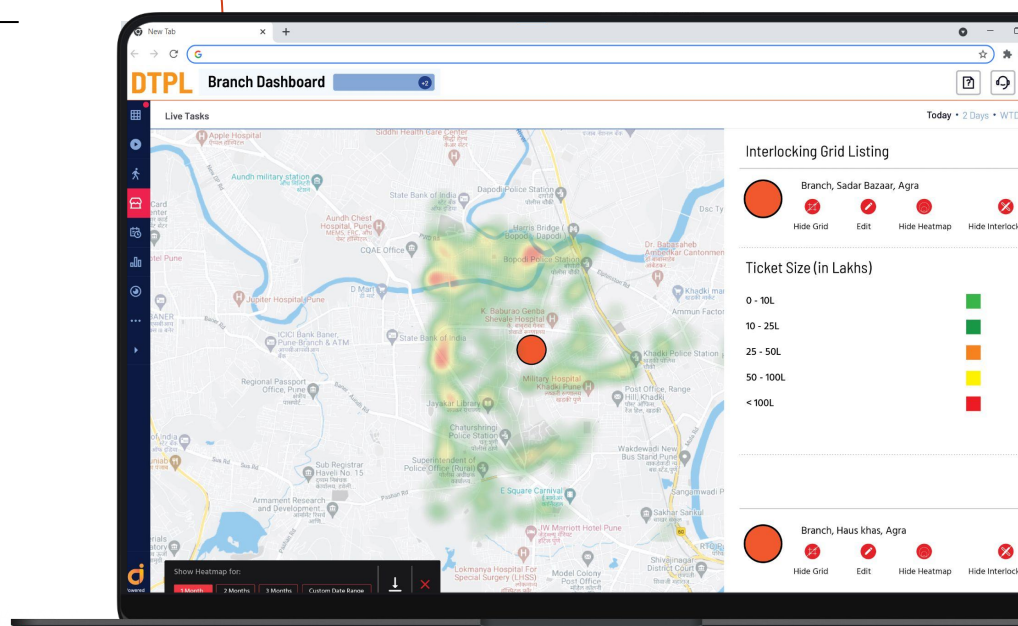→ ETA notifications

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Identify patterns using AI/ML to define and refine business strategies and customer operations

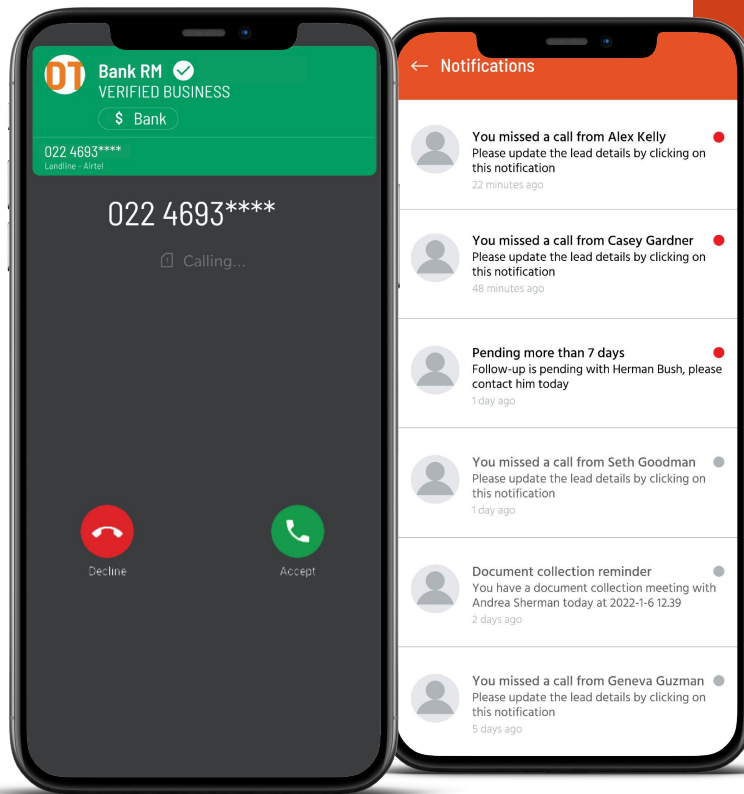# 06 Pattern Identification

Key features

→ Contextual ML suggestions
→ AI-recommendation engine
→ Parse historical data
→ Audit trails

07 Call Logging and Masking

Ensure security for business and customer data

Bank RM ✓
VERIFIED BUSINESS
$ Bank
022 4693****
Landline - Airtel

022 4693****

📋 Calling...

Decline   Accept

← Notifications

You missed a call from Alex Kelly
Please update the lead details by clicking on this notification
22 minutes ago

You missed a call from Casey Gardner
Please update the lead details by clicking on this notification
48 minutes ago

Pending more than 7 days
Follow-up is pending with Herman Bush, please contact him today
1 day ago

You missed a call from Seth Goodman
Please update the lead details by clicking on this notification
1 day ago

Document collection reminder
You have a document collection meeting with Andrea Sherman today at 2022-1-6 12.39
2 days ago

You missed a call from Geneva Guzman
Please update the lead details by clicking on this notification
5 days ago

Key features

→ Ensure security and privacy
→ Communication visibility and logging
→ Enhanced user experience
→ Protect customer data
→ Safeguard business phone numbers
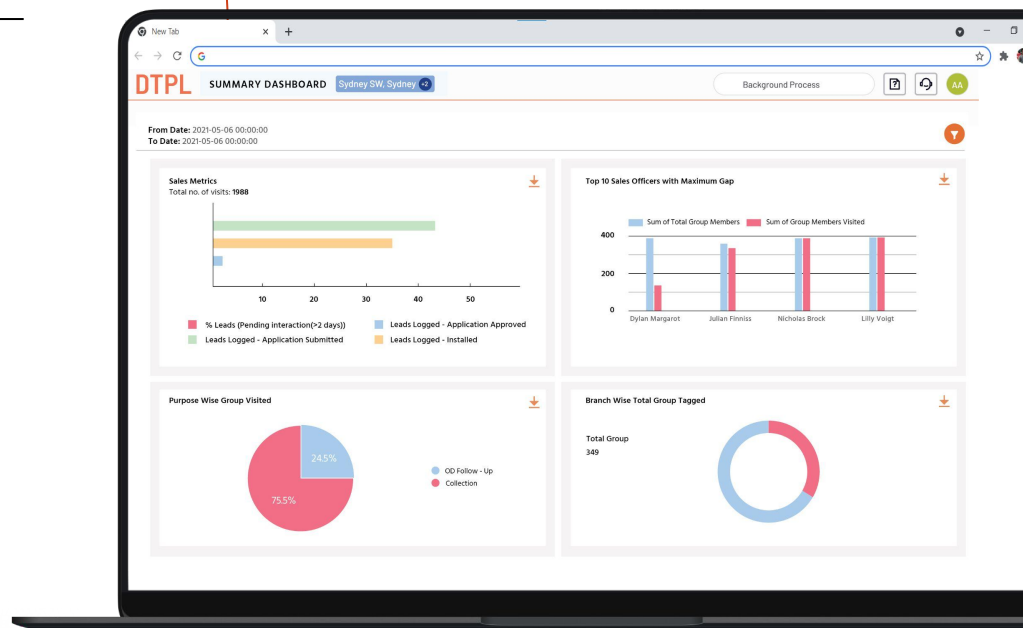→ Missed call notifications

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In-depth, contextual, and relevant insights for informed business decisions
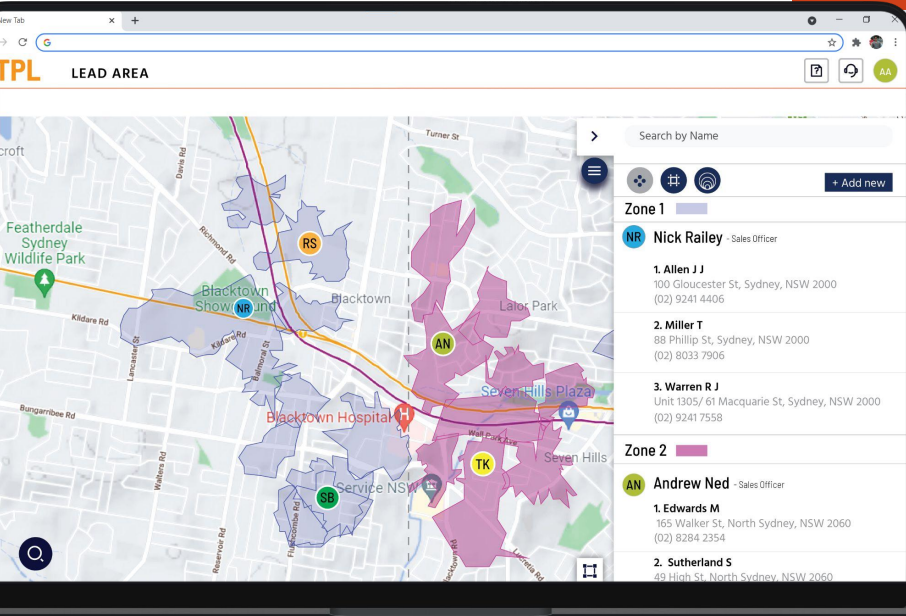
08 Reports and Dashboards

Key features

→ Customized reports
→ Critical info snapshots
→ Service area analysis
→ Drill-down reports
→ Role-based dashboards
→ Smart Filters
→ Real-time interactive dashboards

DTPL SUMMARY DASHBOARD Sydney SW, Sydney +2   Background Process

From Date: 2021-05-06 00:00:00
To Date: 2021-05-06 00:00:00

Sales Metrics
Total no. of visits: 1988

Top 10 Sales Officers with Maximum Gap
Sum of Total Group Members Sum of Group Members Visited

Purpose Wise Group Visited
OD Follow - Up
Collection

Branch Wise Total Group Tagged
Total Group
349

09 Lead Area Definition

Define your lead area for maximum business impact

Key features

→ Pincode mapping
→ Auto and manual plotting to define lead areas
→ Business expansion management
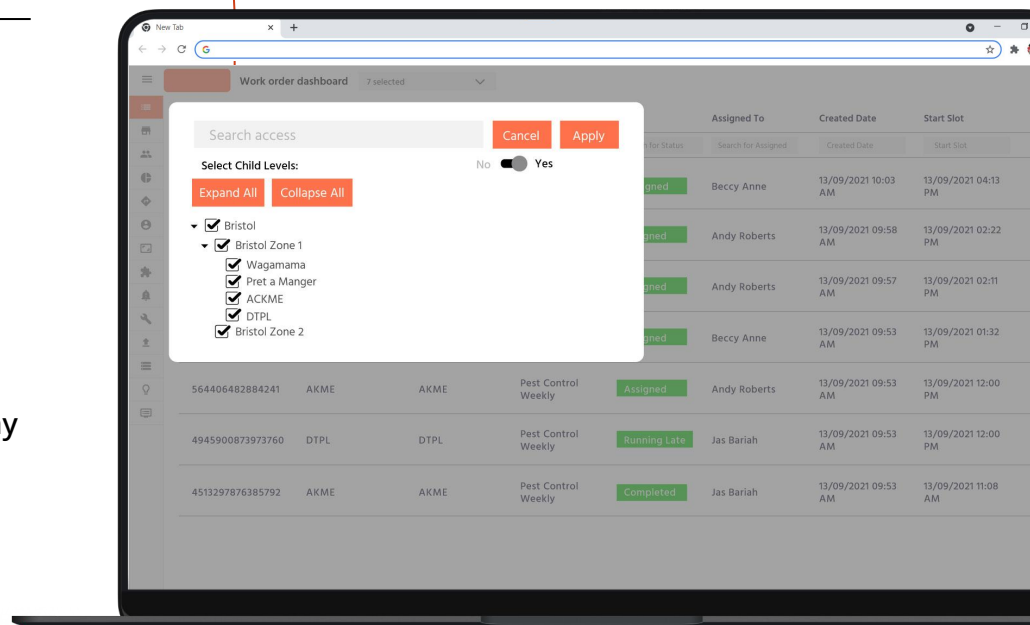→ Optimal resource planning
→ Decongestion management

Define and assign access as per roles and responsibilities

10 Geo-hierarchy Management

Key features

→ Protect sensitive data
→ Get information to relevant functions
→ Role-based access
→ Define organizational hierarchy

11 App Assistance

Leverage Dista Sales for all sales management operations

Key features

→ Capture customer disposition
→ Manage customer meetings
→ Media upload
→ Real-time nudges
→ Calendar view

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