

Keep Complex B2B Sales Simple

Continuing to build your pipeline, create momentum, and close fleet deals — without overcomplicating the process. Here are some shortcuts and ways to keep focused!

B2B FLEET SALES

FIELD PLAYBOOK



Why Deals Stall

The Real Enemies of B2B Momentum

Silence

No follow-up. No next step. The deal drifts until the prospect moves on.

Missing Stakeholders

You're talking to one person. The decision requires five. Access stalls.

Reactive Calendars

Fire drills, admin, deliveries — they consume the day and shrink the pipeline.

The fix isn't a *better* pitch. It's evolving and learning as we go ... practiced with discipline, every week.



Setting Appointments

Protect Calendar Time

"If your day is reactive, your pipeline will shrink."

Block time like a pro. Momentum is *scheduled*, not hoped for.

Prospecting

2 × 30-min blocks per week

Customer

1 × 45-min visibility block

Planning

1 × 30-min Friday review

PRO TIP: OUTLOOK

Turn Emails Into Appointments in Seconds



Open Outlook and find the email you want to act on



Click and hold the email



Drag it to the Calendar icon in the left navigation bar



A new appointment window opens — pre-filled with the email subject and body



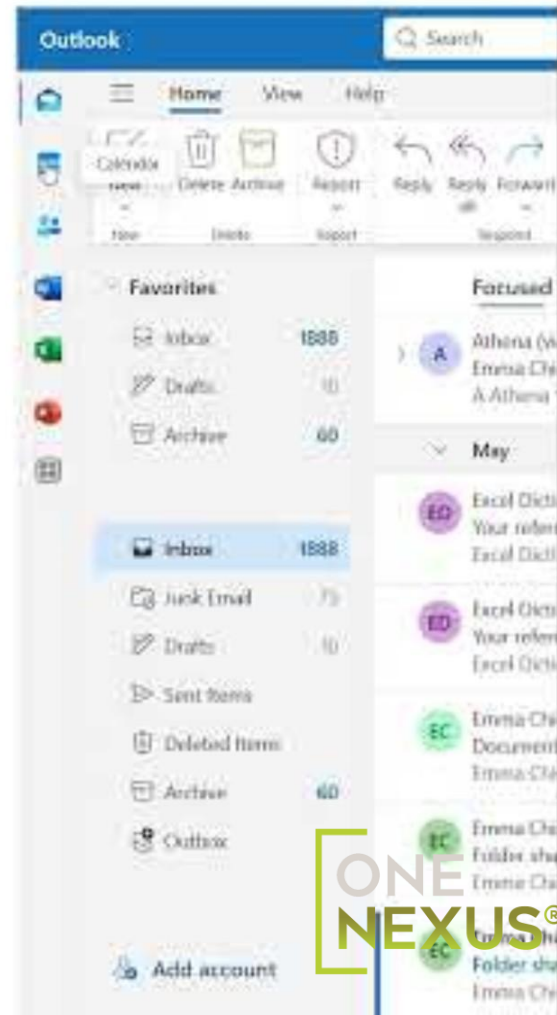
Set your date, time, location (virtual as well) and add any notes



Click Save & Close

This works for follow-ups, demos, and any email that needs a next step.

If it matters, it gets a calendar block.



Build Smarter Contacts on Your Phone

Your phone's contact card is more powerful than you think. The more detail you add, the faster you move — no searching, no guessing.



Full Name + Company

When they call or text, you know exactly who it is and where they're from — no awkward "who is this?" moments.

Tip: Format as **"John Smith – ABC Logistics"** so it shows in caller ID.



Multiple Phone Numbers

Add mobile, office, and direct line. Fleet managers are rarely at their desk.

Tip: Label each number (Mobile, Office, Direct) so you always dial the right one.



Email Address

One tap to send a follow-up, quote, or recap — right from your contacts app.

Tip: Add both personal and work email if you have them.



Job Title + Department

Reminds you of their role before every call. Are they the decision-maker or an influencer?

Tip: Note their department (Fleet, Operations, Finance) to tailor your approach.



Physical Address

One tap opens Maps and gives you directions to their lot or office. No copy-pasting.

Tip: Add the dealership or business address for quick navigation on the road.



Notes Field (The Secret Weapon)

Store anything that doesn't fit elsewhere — fleet size, vehicle preferences, last conversation topic, spouse's name, kids' sports team.

Tip: **"Runs 40 units, cycles every 3 years, prefers trucks, mentioned expanding to new territory in Q3."**



Birthday / Anniversary

A quick "Happy Birthday" text builds more goodwill than a sales call ever will.

Tip: Add it when they mention it. Set a reminder. Be the rep who remembers.

"Your contacts app is your free CRM. Treat it like one."

PHONE TIPS: IPHONE + ANDROID

Pin Important Conversations

Most people lose customer conversations in a sea of texts. Your hottest contacts should always be one tap away.

How to pin / star across platforms —

Press & hold a conversation, tap Pin to keep it at the top of your messages

Right-click or long-press a chat in Messages and select Pin

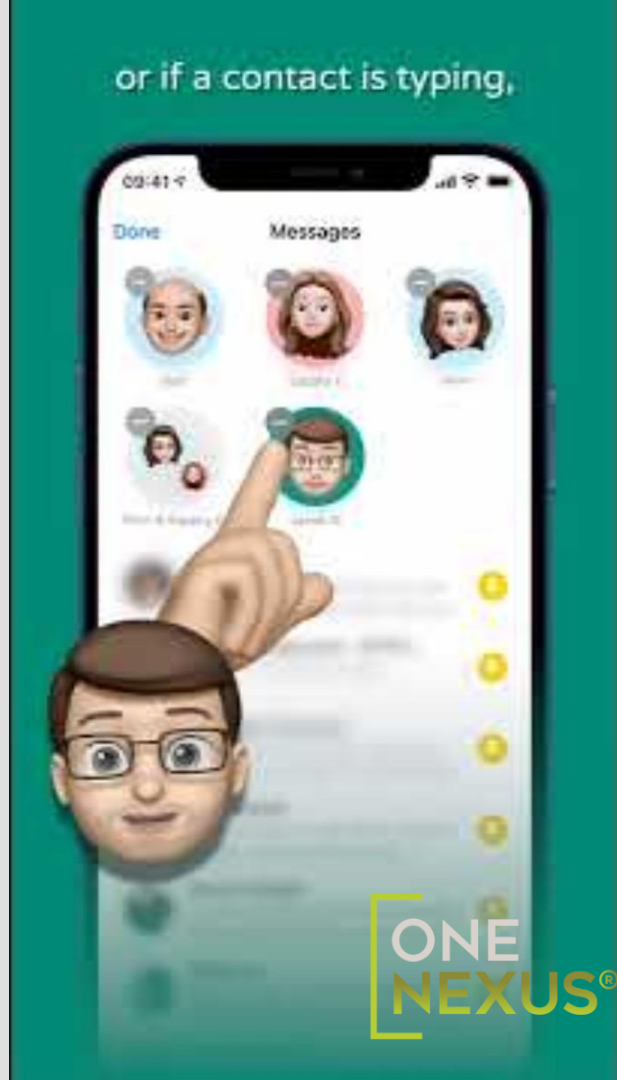
Tap the star icon on any email to flag it for quick access

Why It Matters:

Your hottest contacts should never be buried:

- Fleet prospect you're actively working
- Key vendor or upfitter
- Your manager
- Top service contact

"If you have to scroll to find them, you're already too slow."



Scan Documents with Your Phone

Most people STILL don't know their phone can become a scanner.

How to do it:

iPhone



Open the **Notes** app



Tap the **camera icon**



Select "**Scan Documents**"



Capture and save

Android



Open **Google Drive**



Tap the **+ button**



Select "**Scan**"



Capture and save

App - Files



Open the **Files** App



Tap the **... button**



Select "**Scan Documents**"



Capture and save

Use cases:

- Insurance cards
- Driver licenses
- Signed documents
- Business cards



Only save on company's apps/servers!

Mute + Camera Etiquette = Professionalism

This sounds basic — but poor video etiquette is one of the biggest credibility killers in virtual sales.

- **Stay Muted When Not Speaking**

Background noise kills focus. Mute by default, unmute to talk.

- **Camera at Eye Level**

Prop your laptop up. Nobody wants the up-the-nose angle.

- **Light Source in Front of You**

Face a window or lamp. Don't be a silhouette.

- **Ditch the Ceiling Fan**

Don't sit under a ceiling fan. It looks like an interrogation scene.

"Your camera angle shouldn't look like a security camera at a gas station."



Learn ONE Keyboard Shortcut That Saves Time

People LOVE this because it feels like a hack. Pick one. Master it. Then teach it to someone else.

Teams / Zoom — Mute/Unmute:

Spacebar (hold to talk)	Teams: Push-to-talk while muted
Alt + A	Zoom (Windows): Toggle mute on/off
Cmd + Shift + A	Zoom (Mac): Toggle mute on/off

Computer — Copy & Paste:

Ctrl + C	Copy
Ctrl + V	Paste
Ctrl + Z	Undo (bonus!)

Browser — Tab Recovery:

Ctrl + T	Opens a new tab
Ctrl + Shift + T	Reopens accidentally closed tabs (game changer)

"If you closed a tab by accident and didn't know this shortcut — you're welcome."



Stop Searching for Passwords

The average person wastes HOURS resetting passwords. There's a better way — and it takes 10 minutes to set up.

Face ID / Fingerprint

Enable biometric login on your phone and apps.

One glance or tap gets you in — no typing required.

Saved Logins in Browser

Let Chrome, Edge, or Safari remember your passwords.

They auto-fill on every visit and sync across devices.

"If you're still typing passwords from memory or resetting them weekly — you're losing time you can't get back."

Best Practice

✓ Use locked notes for:

- Wi-Fi passwords
- CRM logins
- Account reference numbers
- Emergency contacts
- Important business info

⚠ X Avoid storing:

- Banking passwords
- Social Security numbers
- Highly sensitive financial data

Locked Notes Setup

01

iPhone — Notes App

1. Open the Notes app
2. Create or open a note
3. Tap the Share icon (square with arrow)
4. Select "Lock Note"
5. Choose: Use iPhone Passcode or create a separate password
6. Tap the Lock icon to secure the note
7. Unlock later with: Face ID, Touch ID, or passcode

02

Android

Google Keep

1. Open Google Keep
2. Create or open a note
3. Tap the 3-dot menu → Select "Lock"
4. Use: Fingerprint, Face unlock, or device PIN

Samsung Notes (Best Android Option)

1. Open Samsung Notes
2. Move sensitive notes to Secure Folder
3. Enable: Fingerprint, Face unlock, or PIN protection