

Move deals forward with better team access to sales info

Give your sales team a boost with the one tool to stay on top of every sale. Whether you're behind the desk or in the field, Evernote is the indispensable hub that keeps all the collateral you need to close the deal. Manage the sales process, track customer updates, and keep important files together in one place where it's easy to search and share.

EVERNOTE FOR SALES



Gather external information on prospects from their websites, LinkedIn, and recent news

Contribute your own intel from phone calls and meeting notes, business cards, and your inbox

Publish it all to shared notebooks for the rest of the sales and marketing teams

Accumulate and iterate work for ongoing team discovery

BENEFITS

Centralize lead information

Sales are easier to close when information is all kept together. Capture the bits and pieces that are vital to the sale in Evernote. There, it's all searchable and sales agents can access the relevant communications, notes, and research for the proper context to engage customers.

Keep stakeholders in the loop

Skip the meeting. When everything is in Evernote, it's easy to make it available to everyone who should see it. Managing a sales team's progress is easier, and shared notebooks make it easy to give feedback and stay updated.

“Evernote Business is a game changer. Our team can be anywhere and still have the sales information they need in an instant, from reports to visual snapshots of each account in any region.”

Mateo Sluder | Sales Team Leader,
Guayakí

FEATURES FOR RESEARCH

Work from the field

PDFs and sales templates can be annotated and edited from mobile without leaving Evernote.

Access intel anywhere

Evernote syncs to all your devices. Have notes on the road, in the air, and even places with no internet at all.

Smart categorization

Notebooks, tags, or both—build an organization system that works with your team's flow.

Additional features:

Collaborative team notebooks	✓
Share and discuss in Evernote	✓
In-app discussions	✓
Sync across phones and computers	✓
Offline access on mobile	✓
Search inside Office docs and attachments	✓
Turn notes into presentations	✓
Annotate attached PDFs	✓
Scan and digitize business cards	✓
View previous versions of notes	✓
View previous versions of notes	✓
Single sign-on (SSO)	✓
TLS/SSL encryption	✓

ACCOUNT MANAGEMENT

Teams of 25+ get dedicated account management

Sign up for 25 licenses and receive personalized service from an Evernote Account Executive. Get customized onboarding and the ongoing support you need to make Evernote work within your team's research process.

ADMINISTRATION

Administrative control for group deployment

Evernote Business' admin console is an all-in-one destination for team administration. With it:

- Add or manage users
- Check billing history
- Manage note and notebook content
- Toggle security preferences
- Integrate Evernote Business with external services

Ensure data continuity over time and get the peace of mind you need with admin tools that make managing Evernote Business straightforward.

MORE INFORMATION

To purchase Evernote Business for your team or learn more, visit [Evernote.com/business](https://evernote.com/business)