

# Service Description Beest Sales Management Tool

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## Beest Introduction

Beest is a Sales Management Tool delivered to our customers as a cloud SaaS solution.

Beest offers a complete suite of modules and functionality to accommodate all the needs of your field sales and fundraising organization and all the tools needed for your sales administration. Ranging from employee onboarding, contracts and training to sales registration with customer id, payment on site and gamification for superior results in every sales organization out there.

Beest has been developed in close cooperation with one of the largest field sales agencies in the Nordics over the last decade or so and is now ready to support the rest of the field sales and fundraising organizations out there.

Beest will continue to be developed together with our customers to meet the demands and the need for smoother and more efficient sales operations.

With a subscription on Beest you will always have the latest updates and we will push new releases with features and functionality to our customers continuously – Beest is a cloud native software and is delivered from our state-of-the-art datacenters in Green Mountain, Norway, and backed up to Microsoft Azure in Amsterdam.

In this document you will get an overview of some of the cool features and functionality Beest provides. For the full Beest experience – we suggest you book a demo with us.

## Beest Modules & packaging

Beest is available in three different subscriptions that consist of different modules, features and functionality to meet the variety of needs of the different organizations out there.

In addition, our customer will have access to our dedicated on-boarding team, first class support and a 99,5% SLA

## Beest Features and functionality

Beest offers a wide range of features and functionality to meet the needs of our clients and are also in constant development – releasing new features continuously.

### **Overall list of features and functionality:**

- Sales Management and leads generation
- Live maps and tracking
- Campaign Management
- In-app digital presentations
- Gamification with badges/rewards and challenges
- Social and Messaging center

- Mobile Signing
- Digital Contracts
- In-app payments (one-time and recurring)
- Secure identification and verification

- Advanced dashboards with data pivoting
- Address lists and route planning

- Employee contracts and timesheets
- Training and certification
- Knowledge tests
- In-app recruiting for reps

- Customer Survey Tool
- Real Time Fraud Control

API's and integration  
GDPR Compliant  
PCI Compliant  
Encrypted Data  
Two-factor authentication  
IP Security  
Webapp, IOS and Android

Support  
On-boarding  
Beest Training  
In-person training

## Leads generation and customer acquisition

### Beest Live Maps:

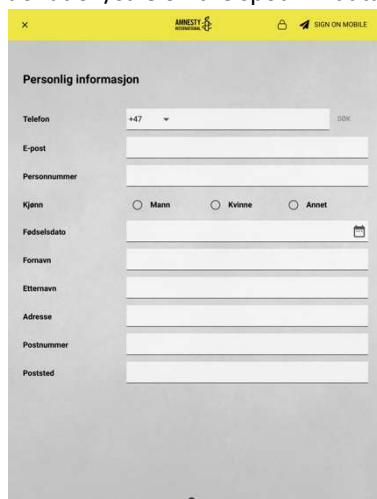
With Beest Live Maps you can track all movement and activities in real time making sure you can collect and analyze data from a specific geographic area in real-time.

Our Live Map can be used to gather data about a specific geographical area, such as a city or an area within a city. This can include information about population density, customer preferences, and other relevant information for sales purposes.

Another benefit of live mapping is that it allows reps to optimize their route planning based on actual data on traffic conditions, customer patterns, and other factors that can affect the effectiveness of sales work. This can reduce the time your people spend traveling and give them more time to spend with customers, increasing productivity and sales.

### Lead generation/Data collection

Collect valuable data on your customers and use it for analysing your past and current efforts and plan your future efforts. The history of the address will be saved for better planning and making sure you are working the best areas. You also have customizable forms to collect the necessary data for leads generation or a donation/sale on the spot. All data gathered in Beest can be sent to any CRM/ERP system.

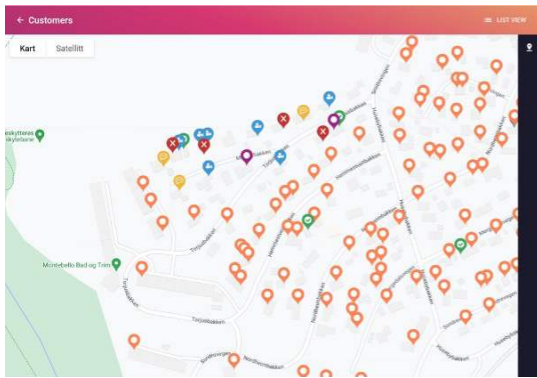


The image shows a mobile application interface for data collection. At the top, there is a yellow header with the Beest logo and a 'SIGN ON MOBILE' button. Below the header, the form is titled 'Personlig informasjon'. The form fields include: 'Telefon' with a dropdown for '+47' and a 'SØK' button; 'E-post'; 'Personnummer'; 'Kjønn' with radio buttons for 'Mann', 'Kvinn', and 'Annet'; 'Fødselsdato' with a calendar icon; 'Fornavn'; 'Etternavn'; 'Adresse'; 'Postnummer'; and 'Poststed'.

### List or Map planning

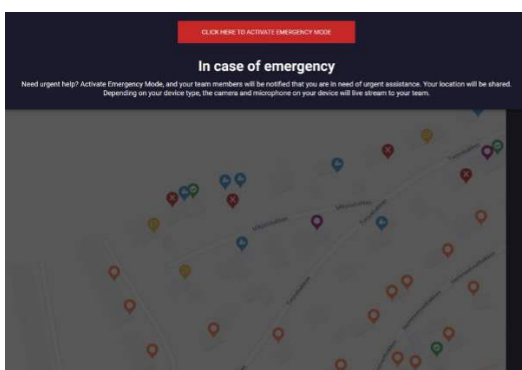
With Beest you can plan ahead with imported lists of addresses to visit in specific areas.

Or you can give your reps an area and they will use their live map to select the houses they are visiting.



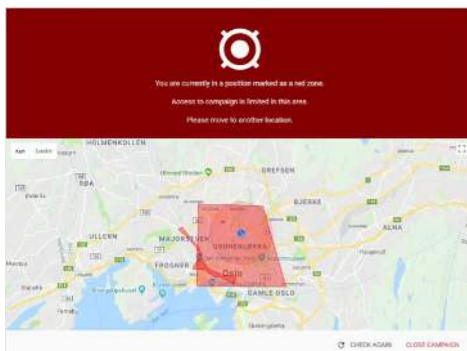
## Emergency button

If anything happens your reps can push the emergency button to alert and get help



## NO GO/Red Zones

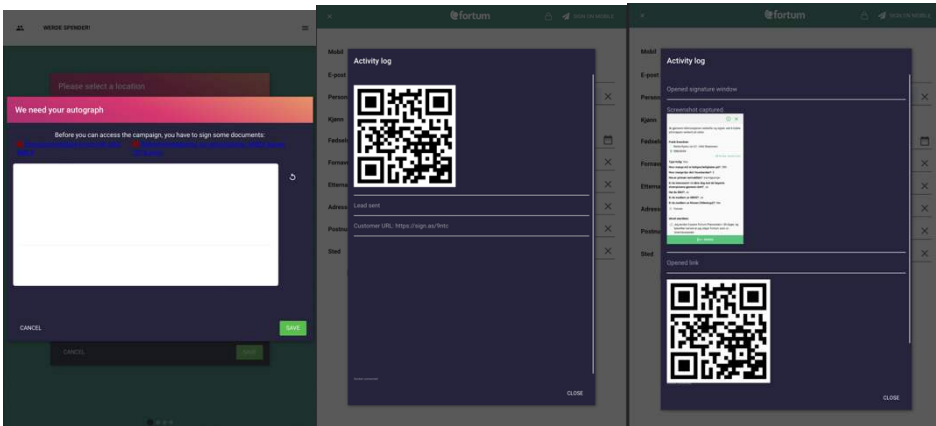
Make sure your reps are not entering the no-go zones and have them focus on the most important areas where you are likely to succeed



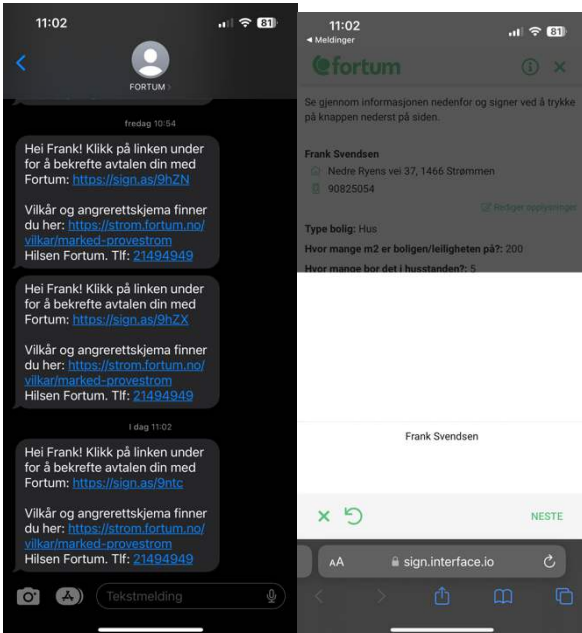
## Digital signing, contracts and verification

### Digital signing

With Beest you can have the customer sign the digital contracts on their own device or through mobile signing/verification. And although the customer does the signing on his/her device (link sent by SMS) - the rep can follow all the steps on their device – as seen under.



On the customer/donor device:



## Mobile look-up and ID verification

With the donor/client's mobile phone number we do address look-up and we also verify customer information through social security number and email control/check to minimize errors and streamline the process. We also do modulus check and bank account verification (where available).

fortum

MOBIL

Mobile: +47 90825054

E-post: \_\_\_\_\_

Personnummer: \_\_\_\_\_

Kjønn:  Mann  Kvinne

Fødselsdato: \_\_\_\_\_

Fornavn: Frank

Etternavn: Svendsen

Adresse: Nedre Ryems vei 37

Postnummer: 1466

Stad: Strømmen

Skal leveres til en annen adresse

In addition, we do look-up on Social Security Number and e-mail control.

fortum

MOBIL

Mobile: +47 90825054

E-post: \_\_\_\_\_

Personnummer: 23007743131

Kjønn:  Mann  Kvinne

Fødselsdato: 1977-05-23

Fornavn: Frank

Etternavn: Svendsen

Adresse: Nedre Ryems vei 37

Postnummer: 1466

Stad: Strømmen

Skal leveres til en annen adresse

## Gamification

Gamification is an important concept in sales organizations because it can help increase motivation, engagement, performance, skills and help build stronger, better teams. All in a fun and engaging way where they become self-motivated.

By leveraging the power of game mechanics, sales organizations can improve the effectiveness and productivity of their sales teams, leading to increased revenue and growth.

## Points

In Beest all reps are getting points for their efforts (a signed contract, a worked shift, a generated lead or whatever our client wants to measure). This feature lets you measure and award across teams, cities, campaigns etc on equal ground.

These points and/or activities is the basis for our gamification module that will give people awards based on their achievements.

## Top lists

In the app used by the reps they will see the top-list for the organization and divided by country/region, how many points they have scored and the badges they have earned.



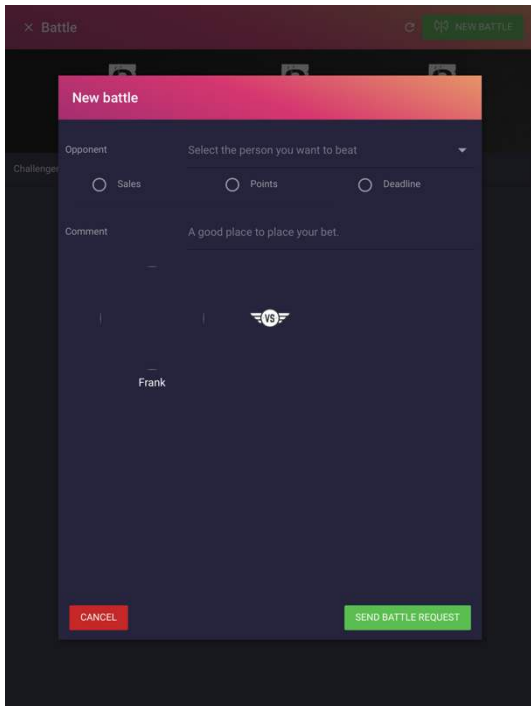
## Awards/Badges

Beest has a set of predefined badges and awards that are ready to use. These will automatically be awarded upon achievement and visible for the person who earned it and colleagues. Customer specific badges can be created upon request.



## Challenge

In Beest colleagues can challenge each other for an informal competition. We will keep score and you will have full control if you are on top – or not. Who wants to lose against their colleagues?



## Campaign Management

Campaign management is an essential component of running a field sales organization.

It involves planning, executing, and measuring the effectiveness of targeted sales and marketing campaigns. Campaign management allows organizations to maximize the impact of their outreach efforts and drive more revenue and growth.

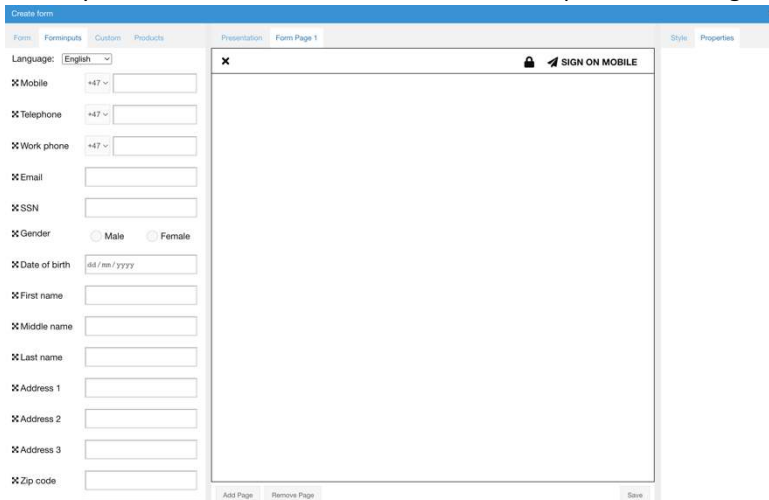
Beest Campaign Management make sure you run your campaigns as effective as possible and let you have multiple campaigns running at the same time.

### Create campaigns

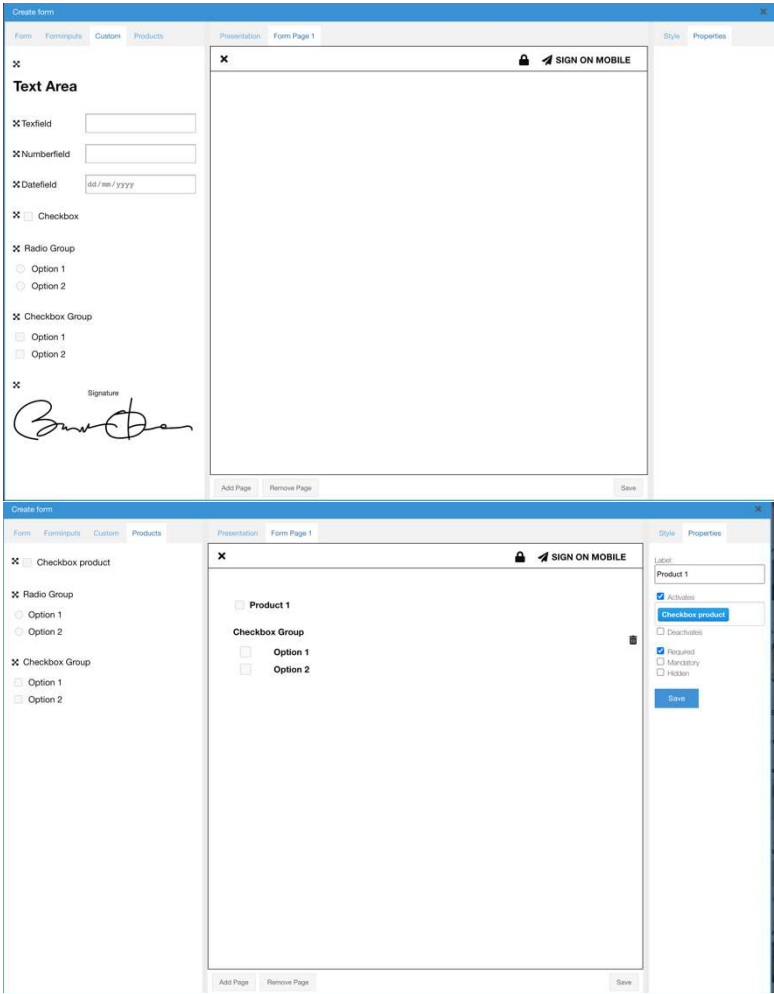
Beest lets you create your own campaigns with ease. Our campaign wizard guides you through the whole process of creating the best campaigns to fit your purpose.

It includes everything from addresses/map zones, branding, content/presentations, products, customer information forms, payment solutions, reporting, employee management etc.

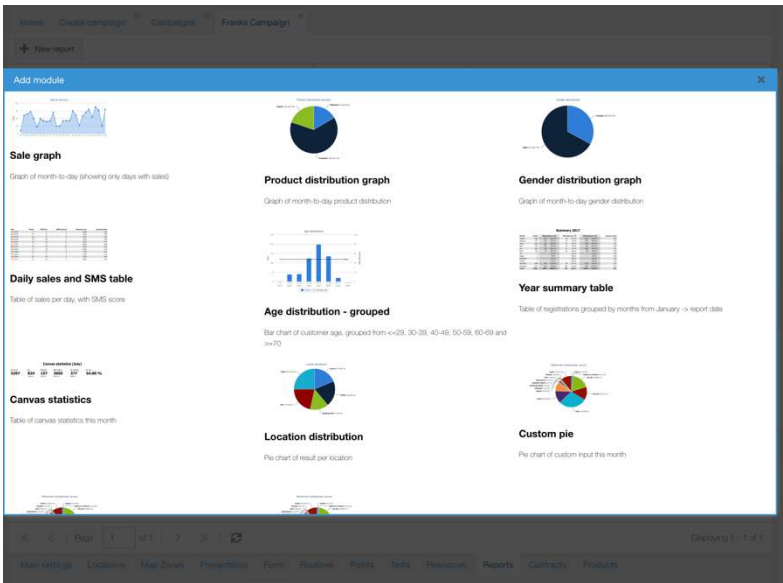
Create your own forms with customer information, products and signature fields:



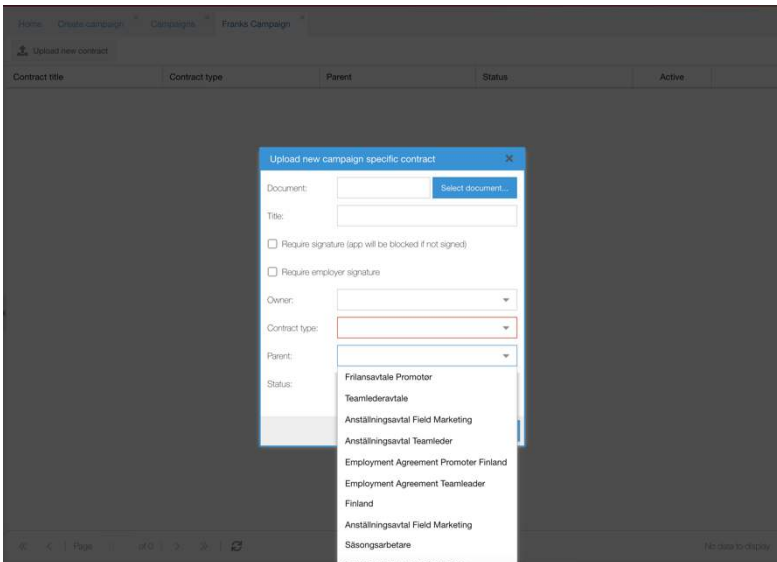




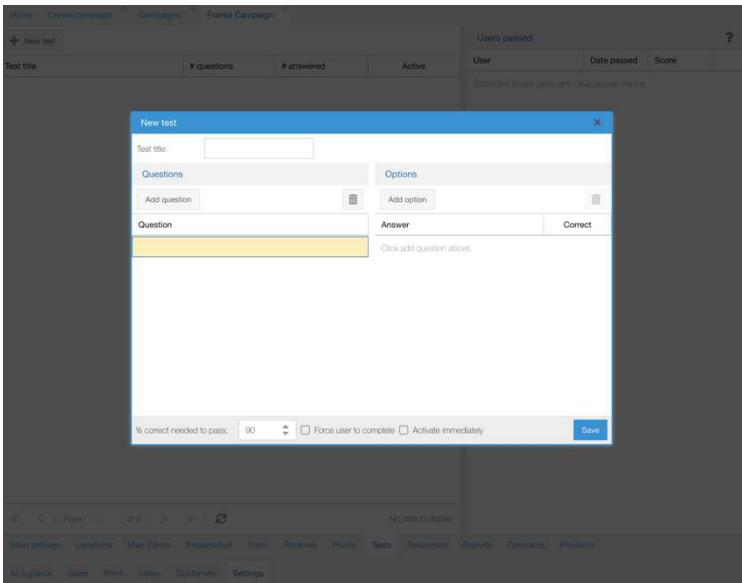
Set up your reports and automatic send outs:



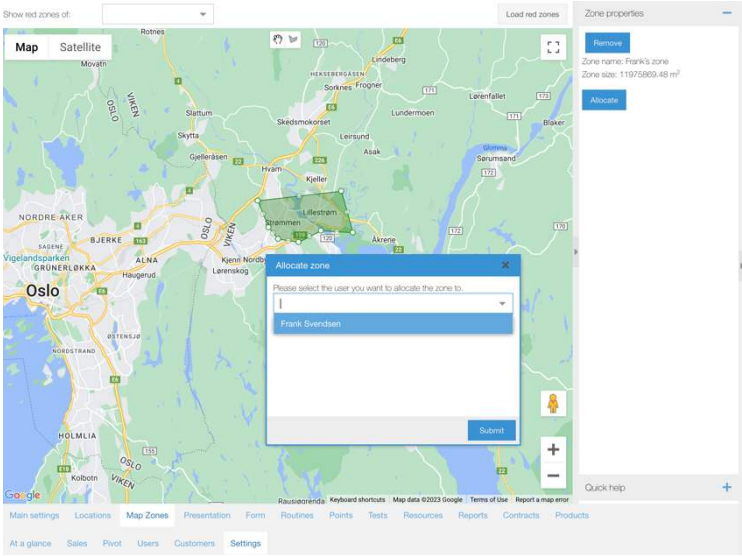
Set up your campaign specific contracts – both for employees and customers



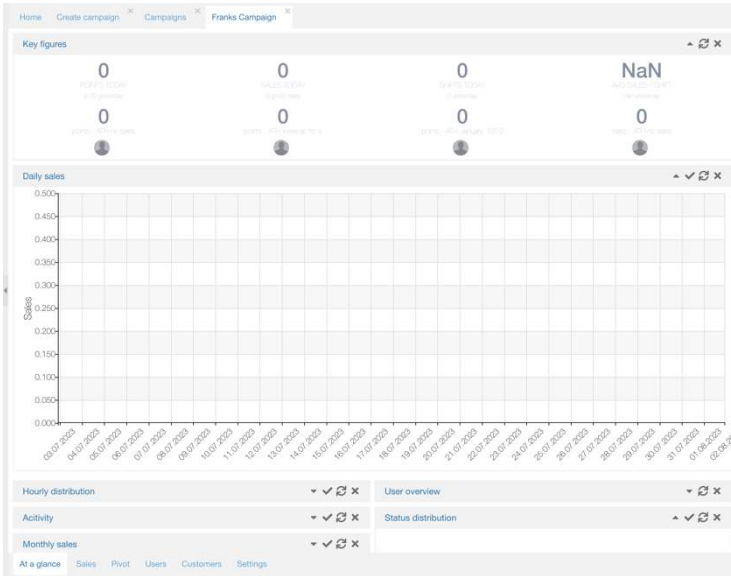
Create Knowledge tests for the actual campaign – reps need to pass to access and work on the campaign:



Create your zones and allocate them to your reps – or you can import your list of addresses:



Campaign Performance – your campaign dashboard will give you direct access to your KPI's.



## List or Map planning

A vital part of your campaigns is the areas, locations or addresses you want to work on.

With Beest you can plan with imported lists of addresses to visit in specific areas. Or you can give your reps an area and they will use their live map to select the houses they are visiting.

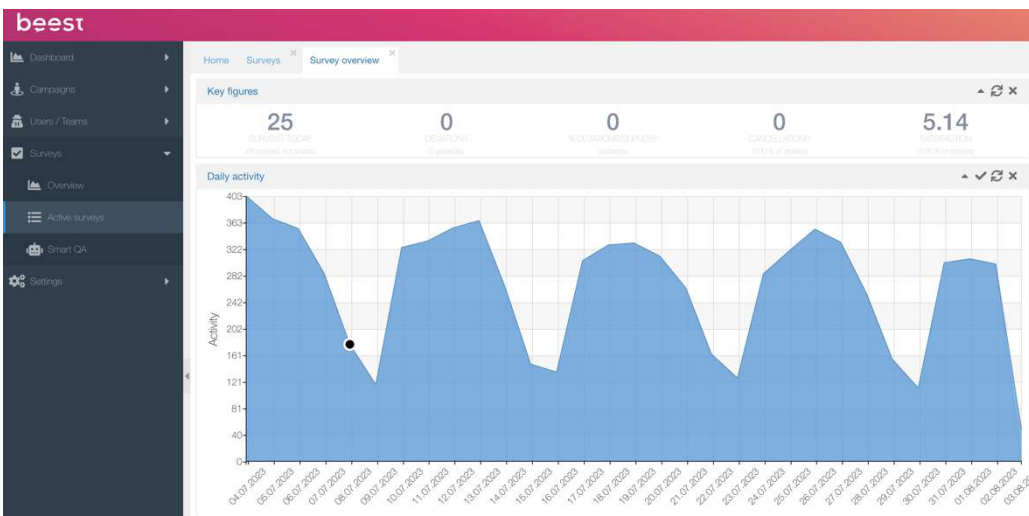
## Quality Assurance

### Customer Surveys

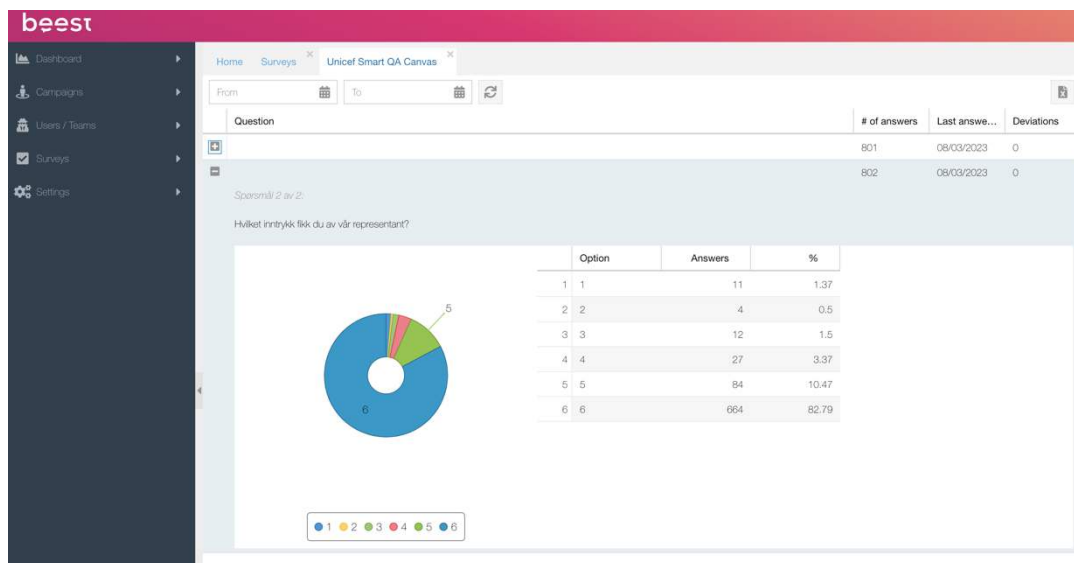
Send SMS/Email after visiting a client/new order and make sure that your reps are performing as they should. If any low scores (threshold set by client) - a red flag will automatically be raised, and a team leader or manager can close the loop and contact the customer.

The customer surveys are easily created in the campaign module.

Customer survey overview in dashboard:



Detailed information per survey:



You will be notified when a low score is submitted, and you have all the relevant information in the same window:

The screenshot shows a detailed view of a survey response for 'Göran Sachs'. The response is for a 'Low score' and was submitted by 'Robin Kokkonen' on '2020-06-26 14:51:03'. The survey questions and their responses are as follows:

Field	Value
Önskat ålder	
125 kr	<input type="checkbox"/>
200 kr	<input checked="" type="checkbox"/>
Jag förstår att fadderskapet är ett löpande månadsbidrag och inte ett eng...	<input checked="" type="checkbox"/>
Varje månad den 27:e kommer bidraget dras från mitt konto	<input checked="" type="checkbox"/>
För dig som har blivit Barnfadder: Jag förstår att jag som Barnfadder får möjlighet att ha kontakt med ...	<input type="checkbox"/>
För dig som har blivit Flickafadder: Jag förstår att jag som Flickafadder stödjer projekt för flickors rättigheter. Just nu går bidraget bland annat till projekt mot barnäktenskap och könsstymning i Egypten, Pakistan och Guatemala. Som Flickafadder har jag inte kontakt med ett enskilt barn.	<input checked="" type="checkbox"/>
Jag har uppgitt korrekt information och visat giltig svensk legitimation	<input checked="" type="checkbox"/>
Jag bekräftar att jag har läst igenom och gått med på alla punkter samt att jag önskar att stötta Plan International genom att bli fadder	<input checked="" type="checkbox"/>

The response is signed by 'Göran Sachs'.

## Fraud Control

In Beest there are several different control mechanisms that will help you have total control over your team, sales and customers/donors.

Those mechanisms include, amongst others, GPS-tracking of device and customer address, verification mechanisms as described in this document, bank/phone/email/signature controls and making sure the customer and information is real/not used before.

All with access to all information on the transaction, like documents, signatures, answers to surveys, email/sms sent etc, etc.

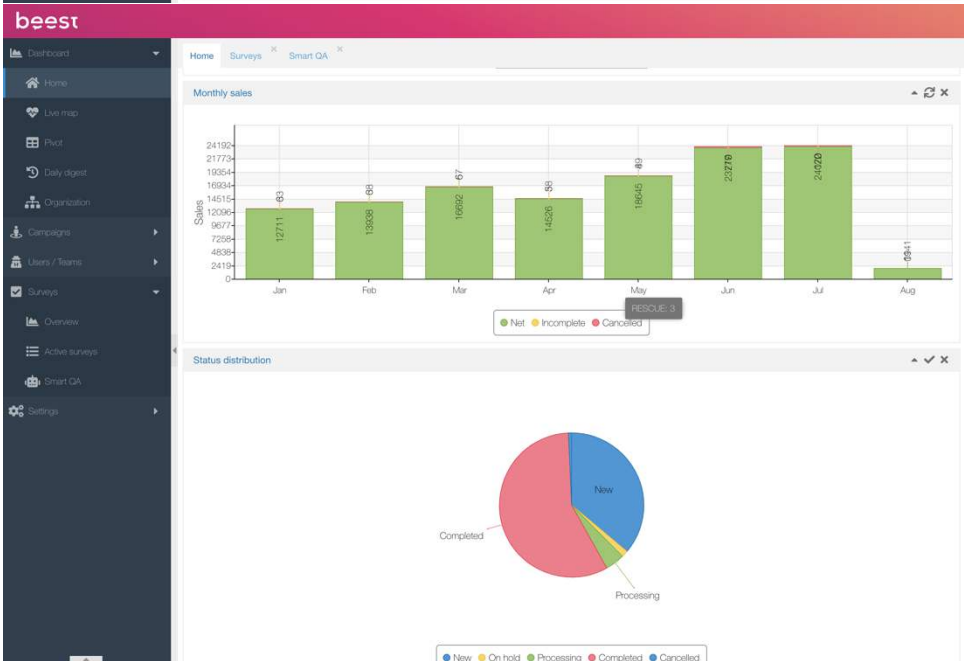
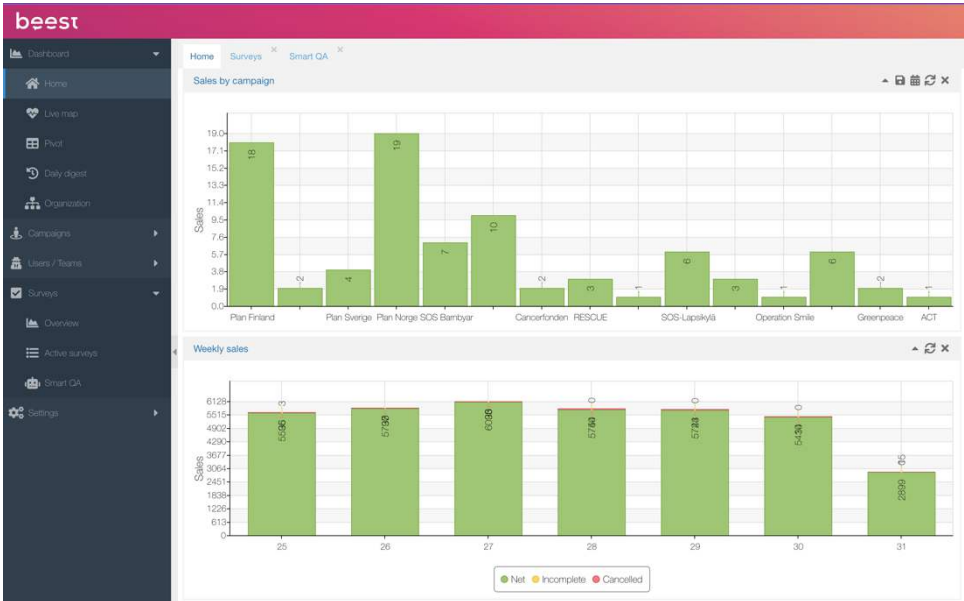
All red flags will be notified according to routines set and visible in the dashboard:

First name	Last name	Campaign	Date of sale	Main status	Substatus	User	Reason	Result
Lisa	Lind	NFC Fykingslipen	2020-07-01 ...	Cancelled	Cancel by partner	Louise Dannert SE	Fraud control	
Odd Eivind Koop...	Torp	Amnesty	2020-07-01 ...	Cancelled		Isac Marselius Bo...	Fraud control	
Anne	Leppinen	Plan Sverige	2020-07-01 ...	Cancelled		Selin Hedegaard...	Fraud control	
Mattias	Uusitala	Amnesty Internat...	2020-07-01 ...	Cancelled		Jasmin Hoti	Fraud control	
Andreas	Ahman	NFC Fykingslipen	2020-07-01 ...	Cancelled		Fredrik De Wall	Fraud control	
Pamila	Sundin	Plan Sverige	2020-07-01 ...	Cancelled		Rickard Kinga	Fraud control	
Kurt Emil	Knutsen	Amnesty - canvas	2020-07-01 ...	Cancelled		Magdalena Lindb...	Fraud control	
Zubaida	Khatoun	Fykingslipen C...	2020-07-01 ...	Cancelled		Torje Myrvåg	Random	
Wonche	Granvang	Kirkens Nædhjelp	2020-07-02 ...	Cancelled	Documents sent t...	Kristoffer Lernes	Random	
Sandra	Walberg	NFC Fykingslipen	2020-07-02 ...	Cancelled	Cancelled at welc...	Mohamed Maha...	Random	
Al-Idr Duprik	Iversen	Kirkens Nædhjelp	2020-07-02 ...	Cancelled	Documents sent t...	Kristoffer Lernes	Low score	
Marta Solweig	Lindbo	Plan Norge - Can...	2020-07-02 ...	Cancelled		Nidal Abu Matter	Fraud control	
Michaels	Kalermo	World Vision	2020-07-03 ...	Cancelled		Niklas Kalermo	Fraud control	
Sara	Himmetbos	World Vision	2020-07-03 ...	Cancelled		Aerne Vepsäläinen	Random	
Øystein	Farevåg	Amnesty	2020-07-03 ...	Cancelled	Cancel by partner	Philip Chohan	Random	
Linda	Tornikist	Plan Sverige	2020-07-03 ...	Cancelled		Selin Hedegaard...	Fraud control	
Karoline	Aslesen	Plan Norge - Can...	2020-07-03 ...	Cancelled		Peter Edmund Plus	Fraud control	
Henrik	Källbom	SOS Bambyar	2020-07-03 ...	Cancelled		Sabon Dilij	Fraud control	
Henrik	Källbom	SOS Bambyar	2020-07-03 ...	Cancelled		Sabon Dilij	Fraud control	
Thorstein	Baardsen	Amnesty - canvas	2020-07-03 ...	Cancelled		Sverre Skjeltås Dyr...	Fraud control	
Halge	Nilsen	Amnesty	2020-07-03 ...	Cancelled		Isac Marselius Bo...	Fraud control	
Tommy Thoresen	Sommerstad	Plan Norge - Can...	2020-07-03 ...	Cancelled		Nidal Abu Matter	Fraud control	
Jenny	Risberg	NFC Fykingslipen	2020-07-04 ...	Cancelled	Cancel by partner	Emil Sarajic	Fraud control	
Mats	Adolfsson	SOS Bambyar	2020-07-06 ...	Cancelled		Jasper Karlsson	Fraud control	

## Advanced dashboards and reporting

Beest Advanced Dashboards will give your team and team leaders / managers the tools they need to have the overview and data necessary to manage effective and productive teams in the field. From the dashboard you will manage all the users, campaigns, surveys, QA, reports, recruiting, campus/training, payroll/timesheets, employee contracts etc, etc.





Our Pivot is where you can really drill down in your numbers and performance and set up your reports to be exactly as you want them. And, of course, you can have them sent to you by email or exported to another tool for further processing.

**beest**

Dashboard | Home | Surveys | Pivot

Range: 2023-08-03 | 2023-09-03 | Reload

Country	Campaign	Team	User	Points	Shifts	Sales	Avg sales	Avg points	Avg value	% Budg
1	Finland			90.25	25.0	31	1.24	3.61	16.36	39
2	Norway			86.00	46.0	36	0.78	1.87	233.33	19
3	Sweden			199.10	137.0	77	0.56	1.45	164.78	15
4	Grand total			375.35	208.0	144	0.69	1.80	157.12	19

Conting presets: Sales per country

**beest**

Dashboard | Home | Surveys | Pivot

Range: 2023-08-03 | 2023-09-03 | Reload

Country	Campaign	Team	User	Points	Shifts	Sales	Avg sales	Avg points	Avg value	% Budget	Deviations	Cancellat...
1	Finland			90.25	25.0	31	1.24	3.61	16.36	39 %		
2	Norway			86.00	46.0	36	0.78	1.87	233.33	19 %		
3	Sweden			199.10	137.0	77	0.56	1.45	164.78	15 %		
4	Grand total			375.35	208.0	144	0.69	1.80	157.12	19 %		

Conting presets: Sales per country

**beest**

Dashboard | Home | Surveys | Pivot

Range: 2023-08-03 | 2023-09-03 | Reload

**Filter**

Hide incomplete sales

Only sales in target group

Partner affiliation:

Time from: 00:00:00

Time to: 23:59:59

Country	Campaign	Team	User	Sales	Avg sales	Avg points	Avg value	% Budg
1	Finland			31	1.24	3.61	16.36	39
2	Norway			36	0.78	1.87	233.33	19
3	Sweden			77	0.56	1.45	164.78	15
4	Grand total			144	0.69	1.80	157.12	19

Conting presets: Sales per country



	Campaign	Location	Team	2023			Grand total		
				Shifts	Sales	Avg product value	Shifts	Sales	Avg product value
1	ACTSE			6.0	2	100.00	6.0	2	100.00
2	AMSFJ			2.0		0.00	2.0		0.00
3	CNFSE			4.0	4	200.00	4.0	4	200.00
4	GESSE			21.0	12	0.00	21.0	12	0.00
5	GRNSE			8.0	6	166.67	8.0	6	166.67
6	HFSSE			6.0	7	0.00	6.0	7	0.00
7	IRCSSE			17.5	8	210.00	17.5	8	210.00
8	OPSSSE			2.0	2	0.00	2.0	2	0.00
9	PKLSE			5.0		0.00	5.0		0.00
10	PKSSE			11.5		0.00	11.5		0.00
11	PLSFJ			20.0	22	17.14	20.0	22	17.14
12	PLSNO			40.0	32	225.00	40.0	32	225.00
13	PLSSE			18.0	10	0.00	18.0	10	0.00
14	SE Talents Face2face					0.00			0.00
15	SOSFJ			3.0	9	15.00	3.0	9	15.00
16	SOSNO			4.0	4	300.00	4.0	4	300.00
17	SOSSE			14.0	9	150.00	14.0	9	150.00
18	UNINO			2.0		0.00	2.0		0.00
19	UNISE			24.0	17	150.00	24.0	17	150.00
20	Grand total			208.0	144	157.12	208.0	144	157.12

## Security and integrations

### GDPR and PCI

Beest is fully GDPR and PCI compliant.

With Beest you can anonymize any data and set individual triggers on when data should be deleted.

Beest integrates with payment gateways and doesn't process or store any payment data.

### Integrations

Beest has an open API and already supports a long range of integrations towards other systems like: Stripe, Nets, Adyen, Google Maps & Places, Elhub, Cornerstone, Fonecta, OrgSys, Salesforce etc.

New integrations are added to this list continuously and with our open API we can easily push/pull data to and from your CRM/ERP or other system.

### Encryption & two – factor authentication

All information in Beest is encrypted and Beest supports two factor authentication with SMS – code sent to mobile.

## Beest Pricing

With Beest you can choose two different pricing options: Subscription based or transaction based.

Subscription based pricing is per user per month and transaction based is per single signed customer using Beest.

### Subscription based pricing:

Features	Included
Sales and campaign management	Y
Live maps, route planning and tracking	Y
Gamification	Y
Advanced dashboards	Y
Social and messaging centre	Y

Employee contracts, recruiting and timesheets	Y
Customer Survey Tool (incl 1 SMS/email pr transaction)	Y
Training, knowledge test and certification	Y
Mobile signing	Y
Digital contracts	Y
Physical Signing (on tablet)	Y
In-app payments (one-time and recurring)	Y
Secure ID and verification	Y
Information Look-up	Y
Real time fraud control	Y
API's and integrations (standard)	Y
API's and integrations (custom)	Invoiced separately
GDPR and Security	Y
Support (standard)	Y
Support (extended)	Invoiced separately

Number of subscriptions are measured at the end of each month and invoiced with net 15 days payment.  
Subscription = active user the actual month

#### Transaction based pricing:

Number of transactions/Year	750	1 500	2 500	3 000
Price per transaction				

Transaction based pricing is post-paid with net 15 days payment.  
Transactions are counted and invoiced each month.  
With transaction-based pricing you get access to all the features and functionality as shown in the table above.

#### Set-up fee:

The set-up fee includes on-boarding, training and configuration of existing integrations that is found in Beest.

## Beest operational and technical stuff

### Best Service Levels

Beest offers an SLA of 99.5% measured Monday to Friday 8:00AM to 5:00 PM.

Our support is available Monday to Friday 8:00AM to 5:00 PM.

For detailed description see “Beest SLA\_EN”

### Beest prerequisites for service

IOS or Android based tablets or web-browser

4G/5G Data connection on mobile devices and internet connection on stationary computers and/or laptops.