

More Revenue. More Predictably. Above Market.



What is SPOTIO?

SPOTIO is the field sales execution platform that turns disconnected field operations into a governed, integrated revenue engine. It's the operational backbone your field team runs on every day---giving reps a purpose-built mobile CRM for territories, accounts, and routes, while giving leaders the visibility, process, and pipeline intelligence they need to forecast accurately and grow above market.

Use SPOTIO as your complete field sales system, or integrate with Salesforce, HubSpot, or Dynamics. Either way, you get clean, location-verified field data and trusted revenue intelligence---without chasing it down.

Why do you need it?

Your CRM tracks deals and pipeline. It wasn't built for mobile field workflows, territory execution, or location-verified activity. Trying to fill the gap with Google Maps, spreadsheets, and delayed manual updates creates territory chaos, invisible reps, and zero real-time visibility.

Key Stats

25%

of a B2B field rep's week lost to admin tasks

33%

of the workday actually spent selling in the field

Source: SPOTIO State of Field Sales 2026

Visibility Into Field Sales Activities

See what's actually happening in the field---by territory, by rep, by day.

- Location-verified activities: every visit, call, and outcome captured with one tap and GPS confirmation
- Territory coverage tracking: see which accounts are worked, untouched, or going dormant
- Activity data that predicts revenue outcomes months in advance---not just reports on what already happened
- Live performance dashboards via SalesScreen integration

Run Tighter Territories

Turn territory management from a spreadsheet problem into a governed system.

- Map-based territory design and enforcement---prevent overlap, close coverage gaps
- Tap businesses on a map to pull contact info from Google Places for B2B prospect discovery
- Route planning in SPOTIO, navigate with Google Maps or Waze
- Calculated mileage based on planned routes

▶ Repeatable Processes that Scale

Turn what your best reps do intuitively into teachable, systematic execution.

- New reps productive in days with guided mobile workflows and pre-mapped territories
- Account history stays in the platform when reps leave---no lost intel, no blind handoffs
- Enrollment-based AutoPlays structure follow-up cadences so nothing falls through
- DASH AI co-pilot: 10-second account brief before every visit; update records by voice between stops, with a confirmation preview before anything is written
- Middle 80% of reps become predictable---not dependent on heroics or tribal knowledge

▶ Works The Way Your Team Sells

- **Prospect-led:** Tap businesses on a map, pull info from Google Places, build territory lists on the go
- **Account-based:** Route to existing accounts, log activities, enroll in AutoPlays---one app, one dashboard
- **Hybrid teams:** Inside reps and field reps share data; no duplication, no gaps in account history

▶ Intergrations That Keep Your Stack Honest

- Salesforce, HubSpot, Pipedrive: Real-time, bi-directional sync---field activity flows into your CRM automatically, so it remains the system of record fed by clean, verified data
- **Microsoft Dynamics:** Seamless sync between field activity and your enterprise CRM; reps stay in SPOTIO, data flows where you need it
- **Download My Day:** Pre-download territories and work offline for up to 24 hours---no signal required
- **Email + Calendar:** Sync Outlook and Google to unify appointments, account visits, and prospect follow-ups
- **SalesScreen:** Gamify field performance and celebrate wins across the team in real time
- **Zapier:** Connect to the tools your team already uses (sync frequency depends on your Zap configuration)

▶ Customer Spotlight: Wholesale Payments



Wholesale Payments, a nationwide merchant services provider with 500 independent reps across all 50 states, was running field operations on spreadsheets with no visibility into rep activity, rampant lead duplication, and no consistent process across their 1099 sales force.

After deploying SPOTIO, they unified all 500 reps on a single platform — eliminating double bookings, giving managers real-time coaching visibility, and making SPOTIO a core part of new rep onboarding. Top producers adopted it universally.

Executive VP Avery Lawson called it ***“a bedrock of success.”***