

WINNING TERRITORY MANAGEMENT

IN SALESFORCE

salesforce

Introduction

Territories are a Big Deal

You could make a strong case that sales professionals are the most valuable of a company's human resources. Without detailing their involvement in all the parts of the customer experience, it suffices to say: successful sales teams usually mean successful companies.

It follows that a company would be wise to make sure their sales people have the best chance at being successful. That's where territories become a key focus.

Territories, when managed well and aligned with the strategic goals of the company, help make your sales teams more efficient and focused, reduce costs (travel, productivity, etc.), allow for more accurate forecasting and performance metrics, and increase employee satisfaction/reduce turnover.

Ultimately, sales reps and their leadership have similar goals for how to approach selling with territories. They want:

- Zero ambiguity about who owns which areas, segments or accounts and how to focus efforts
- Confidence that there is sufficient and fair opportunity to reach the goals/quotas they've been given
- Alignment with the rest of the company and assurance that they're making an impact on the business

How to Win at Territory Management

CRM is perhaps the most important tool you give your sales teams to help them succeed, so it's no surprise that Salesforce emphasizes territory management as one of its critical functions for unlocking customer success. This e-book will show you some of the powerful features, solutions, and resources in the Salesforce portfolio that combine to enable a winning territory management strategy.



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Chapter 1

Get Your Data in Shape

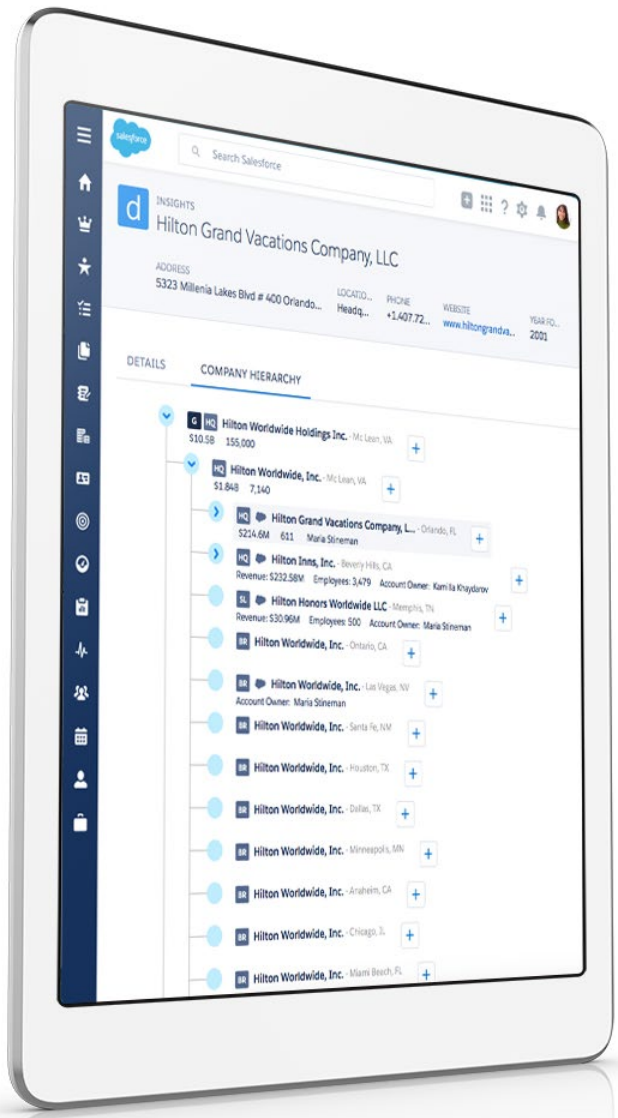
A critical first step to territory management is getting a handle on the total addressable market for your products and services. You need to understand how many and which companies are your current or potential customers. You need to know basic details about each account including: size (employees, revenue, etc.), industry (SIC and/or NAICs), financial details, corporate relationships/hierarchies, and–perhaps most crucial to many territory models–geographic location.

All of this relies on an accurate, complete and usable set of account data. Duplicate, inaccurate and/or incomplete records can completely destroy reps' confidence in their territory, not to mention their ability to reach goals.

Clean, Enrich and Fill Out Your Territories with Data.com

Data.com is the Salesforce solution for managing and improving the quality of your account, contact and lead data. There are several Data.com features that make a dramatic impact on your ability to create and manage territories, particularly in this initial phase where you need to understand and define your universe.





Data.com Clean

It's crucial to establish a foundation of clean and complete data for effective territory planning and alignment. Data.com Clean is the only continuous data management solution native to Sales Cloud, and allows you to automatically clean and maintain all your account, lead, and contact records. With cleaner and more complete account records, you can be confident that you're getting an accurate picture of your current customers and opportunities to prepare for analysis and territory carving. You get the Dun & Bradstreet D-U-N-S™ number on accounts that helps you better track and identify the account, and also enables a reliable corporate hierarchy structure for assigning parents and subsidiaries.

Duplicate Alerts & Blocking

Duplicate records can mean big problems for Sales and Sales Ops. They can cause inaccurate views of the market and territory potential. Dupes can also create conflict between reps resulting in bad customer experience.

The Data.com Duplicate Alerts and Blocking feature is included with Sales Cloud, and allows you to block the creation of duplicate records and/or alert an admin when one is detected. With these rules enabled, you'll worry less about multiple reps working the same account, get fewer complaints about bad data cluttering the system, and have more accurate territories that everyone trusts.

Data.com Prospector

A big part of building out territories is making sure you've included all the potential accounts in your markets. Rather than scouring outside sources then doing cumbersome importing (or worse, manual entry), Data.com Prospector gives you the ability to search for and add new, complete account and contact data right within Sales Cloud. You also get the Company Hierarchy view to help you visually navigate key account families, see white space, and add children and subsidiaries to the system. You can ensure that each territory has the right amount of new accounts to target and prospect into, with reliable and trusted data.

Chapter 2

Analyze & Find Balance

Once you've cleaned and established complete and usable account records, you'll want to analyze your data to help inform your territory strategy. Your goal should be to uncover insights that best show how to match sales strategy and business goals with resources (sales reps and support staff). Ultimately, you want to be able to judge what mix of territories will best strike that balance.

One of the most common ways to carve sales territories is geographically. Analyze the number of accounts by country, region, state, market, or even ZIP code to equitably divide patches by location. Use the data from geographic analysis to create maps (try the Google "My Maps" app) to help you visually understand the distribution of your accounts.

Company size is often a secondary overlay to a geographic cut of territories. For example, you may have teams divided to cover accounts in different employee ranges, and then reps for each of those teams in different regions (e.g. Mid-Market South East). You don't always need to take traditional size divisions as gospel. though. Gether data and analyze the distribution of accounts across markets based on employees or revenue. You may decide to adjust the size thresholds that define your segments from year to year as goals and market dynamics change.

Other attributes for segmenting the market could include: industry/vertical, named or strategic accounts, customer status or contract type, propensity to buy/predictive scoring, sales channel, and many more. Analyze the data across these attributes to determine the revenue potential available and divvy up amongst your sales people.





Analyze With Ease Inside Salesforce

You may be a Salesforce report and dashboard wizard, but there are new, advanced analytics tools that can get you even deeper insight, making your territory planning sessions feel less like solving a 10,000 piece jigsaw puzzle, and more like hitting the "easy" button.

Sales Wave Analytics

Sales Wave is the first app built on the Wave Analytics Platform for Sales Cloud customers. It is a collection of prebuilt dashboards that are personalized to your business. These dashboards are designed to help guide you down a path to uncovering insights unique to your job function. With Sales Wave, the entire team – sales managers, reps, and ops – has the power to dive deep and explore data down to the individual record.

In particular, the **Business Review Dashboard** quickly gives you a high-level view of how your business is performing by every key metric. See closed/won business by owner, customer, geography, product, and source, then drill into the details in the related dashboards.

From the Business Review dashboard, customers have the ability to analyze the winning trends of the business even further by clicking on the "Analyze by" link for customer, geography, owner, product, and source. The Analyze By dashboards allow customers to see more details on the winning trends, quarterly/monthly breakdown of the year over year growth rate, product mix by sales teams or reps, win-loss rates trends, and more. Additionally, this can be sliced and diced by the different levels of the territory hierarchy. You can even compare 2-3 values against each other. All of these dashboards provide easy access to data and the powerful insights you need to do better strategic territory planning.

Chapter 3

Carve & Implement the Territories

Having shored up your account data, and analyzed it to determine the best segmentation strategy, it's time to put the plan into action. For Sales Ops and CRM Admins, the annual process of carving and implementing territories in the CRM can be as stressful and dreaded as tax season for a CPA. But it doesn't have to be...

There are many methods for assigning accounts to sales reps inside Salesforce. Some use complicated algorithms in custom fields or objects. Others might translate an offline, spreadsheet, or paper-based plan into account owner fields or account teams with a data loading utility...or heaven forbid, record-by-record. When companies grow, with an increasing number of reps and accounts, managing all these planning tasks separately from sales execution in a CRM app, without automation, would often mean months of back and forth discussion, changes, adjustment, and reconciliation. Even then there'd be no true guarantee that the territory assignment results would be accurately reflected in CRM. Often, with these obstacles, territory planning can become a bottleneck for effective sales management and execution. But, Sales Cloud has powerful features for helping you create territory models and assignment rules that make management and implementation much easier, quicker, and more effective.

Don't let territory management become a bottleneck for effective sales management and execution.



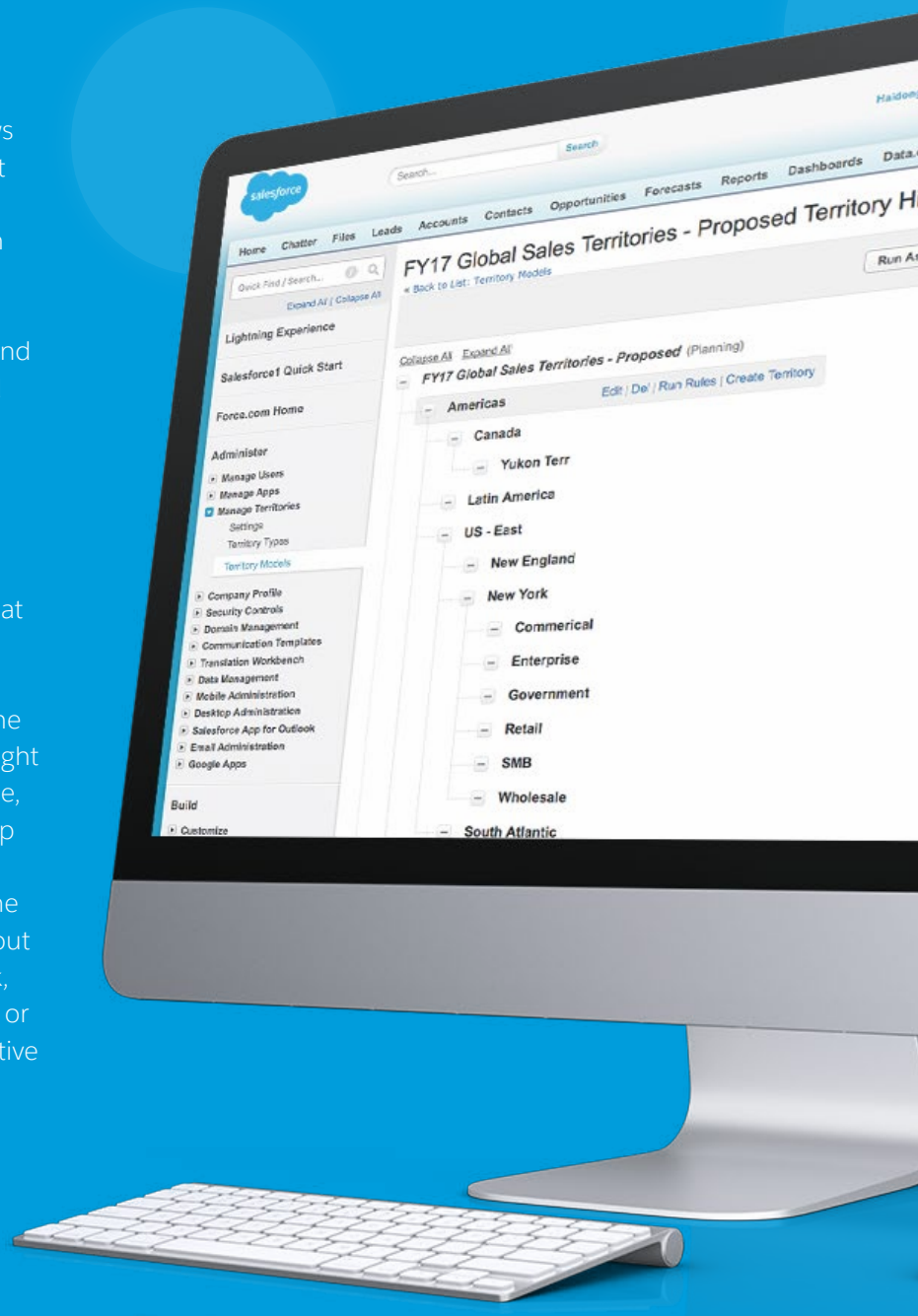
Sales Cloud: Enterprise Territory Management

Included with all editions of Sales Cloud, the native Enterprise Territory Management (ETM) features can model your territories into a logical and flexible structure that maps the right sales reps to the right customers to maximize revenue. With Enterprise Territory Management you can create territory models and define rules for how accounts get assigned within your enterprise. You can preview multiple territory strategies, plan for future territory alignment, and review past territory definitions and assignments all without having to disturb your current org or waste any paper. You can collaborate with various stakeholders to adjust, optimize and activate the one territory model that works best, then continuously refine and balance existing territories until your next major realignment. In short, Enterprise Territory Management in Sales Cloud can help you manage the entire life cycle of territories in your enterprise.

As mentioned earlier, you may have multiple ways to segment your markets: by geography, size, industry, product, or other account attributes. ETM allows you to create territory hierarchies that overlay and even cross over accounts (an account can sit in multiple territories). You can even define multiple roles in a territory and assign different users.

After you've created your territory rules, and built the desired model(s), ETM allows you to run simulations and reports against different models. You get reports that show the accounts in each territory, which accounts have no territory assigned, and how much revenue you can expect from different territories. Then you can adjust and refine to reach equitable and goal-aligned patches.

When you're locked in on your territory model you simply activate the winning model, and accounts get assigned across your org. ETM gives you a territory page that you can customize and use to collaborate with the stakeholders involved in sales planning via Chatter. Over the course of the year sales reps or territory assignments might change. But, with a territory model in place, you can easily and quickly assign a new rep at the territory level instead of reassigning individual accounts one-by-one. And as the sales teams work their territories throughout the year, you can start collecting feedback, begin building next year's territory model, or even make in-flight adjustments to the active model and seamlessly implement them across the org.



Conclusion

A winning territory management strategy is one of the most critical components of a successful sales organization. And, Salesforce has made sure you have all the technology and tools to be able to develop a strategy, build territories, and adjust and maintain them as you grow.

Start by using Data.com to make sure your account data is in shape and that you have your addressable market defined and represented in your CRM. Next, take a close look at the data with Sales Wave to determine the best way to segment territories, finding balance between sales resources and market opportunities. Finally, use Sales Cloud territory management features to better organize models and rules for easier carving, implementation and maintenance.

A strong territory plan not only helps you make the most of your sales resources, but also puts you in a better position to be a customer-focused company. With better aligned territories you can more effectively serve customers. As the front line of your organization, sales people are more likely to be happy and energized, helping deliver positive customer experiences, with healthy territories.



RESOURCES YOU MAY ALSO LIKE:



Learn how healthy your data is with the free Data.com Assessment App.

DOWNLOAD

Learn how to get actionable insights from Sales Cloud with Sales Wave Analytics.

GET THE E-BOOK

See how companies of all sizes can use Salesforce to drive success.

TAKE THE TOUR

Or, to talk to an expert, call us at 1-800-NO-SOFTWARE.



THE CUSTOMER SUCCESS PLATFORM



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