

SOLUTION BRIEF:

Managing Sales Territories with a Unified Sales Operations Platform

GAIN THE ABILITY TO MAKE AGILE & OPTIMAL TERRITORY ADJUSTMENTS



In today's highly competitive environment, sales organizations face various challenges. And sales operations teams are typically tasked with navigating all of them. As a single, unified platform, Optymyze Sales Operations helps navigate challenges efficiently, deal with ongoing changes and maintain a strategic focus on maximizing sales performance. There are many benefits to implementing the Optymyze platform, but this solution brief focuses on those derived from its territory adjustment capabilities.

CHALLENGES

Ongoing market changes and internal company events can result in inequitable sales territories and unbalanced workloads for sales reps. To adapt sales territories to ongoing changes, sales operations need to make territory adjustments quickly, without impacting related sales performance processes negatively. However, making optimal adjustments in a timely manner requires the ability to analyze their overall impact before actually implementing them. And many companies still lack the necessary data, modeling capabilities and process expertise to make advanced analyses and ensure optimal territory coverage at all times.



SOLUTION

To address these challenges, Optimize has developed powerful territory adjustment capabilities integrated with analytics, data modeling, and SPM capabilities. Paired with proven business process expertise, they enable sales operations to create adjustment scenarios and quickly implement optimal ones – all through a single, unified platform. This solution helps sales operations become more agile and capitalize on change.



BENEFITS

- Increase the efficiency of territory management.
- Increase agility in responding to changing market conditions.
- Make better informed decisions.
- Improve overall sales outcomes.
- Gain a competitive edge.



Sales territory management is one of the key business processes that can make or break a successful sales organization. If done right, it can improve customer coverage, increase overall sales, and reduce sales costs. If not handled properly, it can cause inefficiencies that hinder sales operations' ability to respond to changes in a timely manner, and lower sales reps' motivation and performance.

When designing territory plans, sales operations create a coverage model that segments the company's total available market into tiers based on key factors such as customers, opportunity cost, revenue, sales roles, and number of reps available to cover the market. As if territory planning wasn't already difficult to get right, the actual management of the resulting territory plans proves extremely challenging for most sales operations teams, for various reasons.

Changes in sales conditions. For one thing, a sales organization's performance is influenced by ongoing market-driven and internal company changes: innovations disrupt industry verticals; mergers and acquisitions alter addressable markets and sales strategies; key sales staff, customers, business partners, and even competitors come and go – and the list can go on. Faced with so many changes in sales conditions, sales operations need to make ongoing adjustments to sales territories, to ensure optimal territory coverage at all times.

Ongoing adjustments are labor-intensive and time-consuming; when mishandled, they can lead to inequitable sales territories, unbalanced workloads, or duplicate efforts for sales reps. To avoid such territory management inefficiencies, sales operations need to work with sales managers to assess the impact of potential adjustments on sales territories before actually implementing them.

Integration with other sales processes. Given that territory management is interrelated with other sales operations processes, such as compensation and quota management, sales operations professionals and sales managers need to take into consideration the impact that ongoing territory adjustments will have on the outcomes of these processes as well. This means they have to create adjustment scenarios and forecast the outcomes of each scenario to determine which one will bring the best results.

This can be a challenging exercise, as it requires the availability of accurate and up-to-date sales performance data, as well as the ability to handle and model large data volumes.



Lack of accurate data and modeling capabilities.

In many companies, sales data is scattered across various databases, and sales operations have a hard time collecting it. When not properly integrated, these databases can generate duplicate or conflicting records that raise further data management challenges, such as data cleanup or data consolidation.

Moreover, many companies also lack the tools and expertise to perform advanced sales territory modeling – they either use generic spreadsheet applications, or none at all.

All these challenges can seriously hinder their ability to make timely decisions on optimal territory adjustments. As a result, sales organizations can lose out on momentum and opportunities.

To help them overcome these challenges and gain the ability to make optimal territory adjustments in a timely manner, Optymyze has developed powerful territory adjustment capabilities integrated with:

- Key sales performance management (SPM) capabilities, to ensure compensation and other processes are aligned when territory changes occur.
- Embedded extract-transform-load (ETL) capabilities, to streamline data management from other related sales systems like sales force automation (SFA).
- Data modeling and analytics capabilities, to help sales managers and business analysts make better informed decisions.



Optymyze delivers all these capabilities in a single, unified sales operations platform. In what follows, we will look at how they work as part of this platform, to empower [sales operations](#) to make agile and optimal territory adjustments.

OPTIMIZE SALES OPERATIONS:

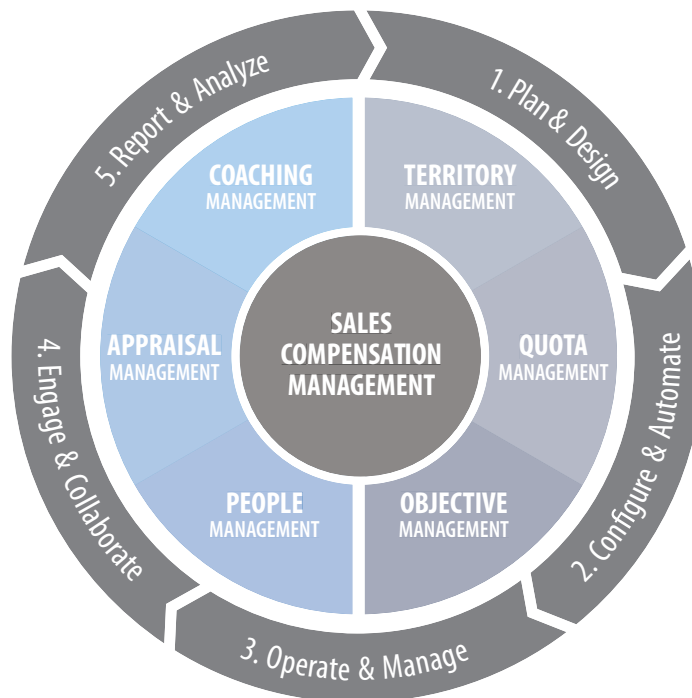
A single, unified platform powering agile territory adjustments

Combining business-process-as-a-service delivered by the industry's most experienced professionals, and award-winning technology in a single, unified platform, Optimize helps sales operations teams gain the ability to quickly address changing sales conditions, increase process efficiency, and improve overall sales outcomes.

FULLY INTEGRATED TECHNOLOGY AND BUSINESS PROCESSES

From a business-process-as-a-service perspective, Optimize experts don't simply lift and shift sales operations processes, but work closely with your sales operations team to tailor them to your corporate objectives. This collaborative process management model follows five steps, as outlined below: *Plan & Design, Configure & Automate, Operate & Manage, Engage & Collaborate, Report & Analyze*, allowing for agility and continuous improvements in sales operations.

From a technology perspective, the Optimize Sales Operations platform leverages the elasticity and cost benefits of cloud deployments to effectively deliver on everything from sales performance management, to sales planning, sales analytics and reporting. Unlike traditional vendors patching together SPM applications and offering standard reporting and dashboard features, Optimize has built this robust solution from the ground up, integrating core SPM capabilities with analytics, modeling and ETL functions.



Sales Operations Process Management

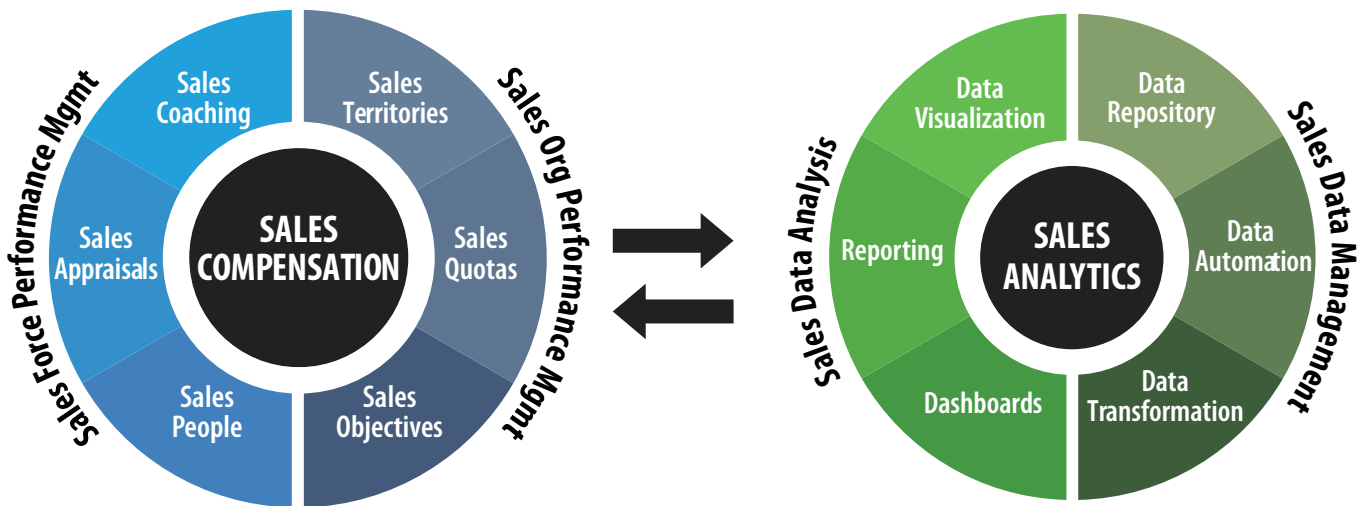
This innovative approach increases process efficiency and enables sales operations to:

- Manage high volumes of data.
- Extract and correlate data from various sources.
- Model and visualize data scenarios in real time.
- Draw powerful insights for better and faster decision making.

Noteworthy, for every sales operations process, Optimize experts apply the best practice process management model described above, and support each of its steps with enabling technology.

Applied to territory management, the Optimize business process management model translates to the following steps:

- Determine the optimal size and structure of your sales force to support your workload and capacity plan.
- Enable your sales operations team to build a flexible and accurate territory model against key business factors.
- Collaborate with your sales team to validate and improve your territory management plans.
- Ensure a successful rollout of your territory management plan and communicate it to all stakeholders.
- Continually analyze ongoing territory activity to pinpoint areas of improvement.



Optimize Sales Performance and Optimize Sales Analytics

To support each of these steps, Optimize provides integrated technology capabilities and features, such as: **Optimize Data Repository™** to ensure a single database for sales-related data, **Optimize Sales Analytics™** to provide integrated data management and analytics you can use to assess territory performance, **Optimize Sales Territories™** to easily visualize territory alignments and see historical information about territory performance, and more.

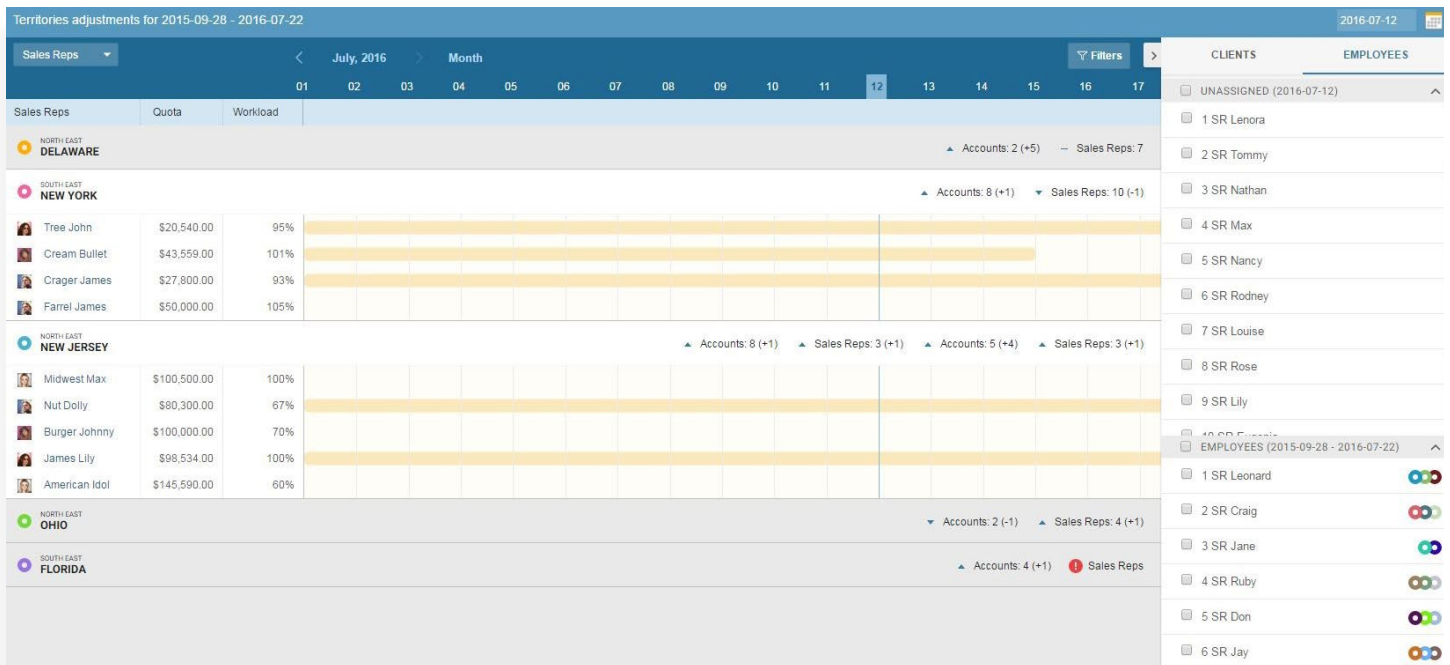
AGILE TERRITORY ADJUSTMENTS

With Optymyze Sales Territories we have taken a step further and integrated highly effective territory adjustment capabilities that empower sales operations to quickly adapt to ongoing changes.

Using the territory adjustment capabilities provided by Optymyze Sales Territories, sales operations teams can adapt territory coverage models to new sales conditions derived from situations such as: sales reps leaving the organization, new sales reps joining, territories not performing as expected, new channel sales partners coming on board, and new products being added to product portfolios.

They can also test out multiple adjustment scenarios, to make sure the adjustments they propose do not impact other business outcomes negatively.

For testing purposes, sales operations can create a copy of live data and perform various adjustments on it. Next, they can submit for approval those adjustments that result in the best outcomes. Simply put, they can visualize the impact of each adjustment before actually implementing it in the system.



Using a copy of live data, sales operations can create territory adjustment scenarios.

All in all, the Optymyze territory adjustment capabilities provide sales operations with the ability to:

- Model a set of adjustments over a particular period of time, and see their impact on each sales territory in real time.
- Analyze the impact of each adjustment model, decide which one will have the best impact, and then submit it for approval.
- Apply adjusted territory definition in the system, when approval is received.

Modeling lowers not only the risk of implementing an adjustment that could have a negative impact on related sales processes, but also the number of proposed adjustments. This translates to higher work efficiency, and eliminates guesswork. Overall, it improves sales operations' ability to address changing sales conditions quickly and accurately, **enabling them to become more agile.**



FINAL THOUGHTS

Reassigning sales reps to new territories or realigning their customers and prospects can be quite a sensitive topic, and can affect various business outcomes, such as quota attainment and equitable compensation. In such a challenging environment, sales operations is a vital function that needs to ensure optimal territory coverage at all times.

According to Gartner¹, territory management adoption has grown from 22% to 38% since 2013. Clearly, enterprises are starting to acknowledge the need for employing territory management tools.

Optimize helps enterprises meet this need, by providing powerful territory adjustment capabilities combined with SPM, modeling and analytics, all in a single, unified platform. This approach allows for higher process efficiency and faster decision making. At the same time, it provides sales operations with the agility to quickly respond to ongoing changes, make optimal adjustments to sales territories, and keep a competitive edge.

For more information, please visit the [Optimize Sales Territory Management](#) webpage. Or talk to a sales performance expert directly: – [click to engage](#).

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¹ Gartner Magic Quadrant for Sales Performance Management, 2016:
<http://optimize.com/learning/sales-performance-white-papers/gartner-spm-magic-quadrant-newsletter/>