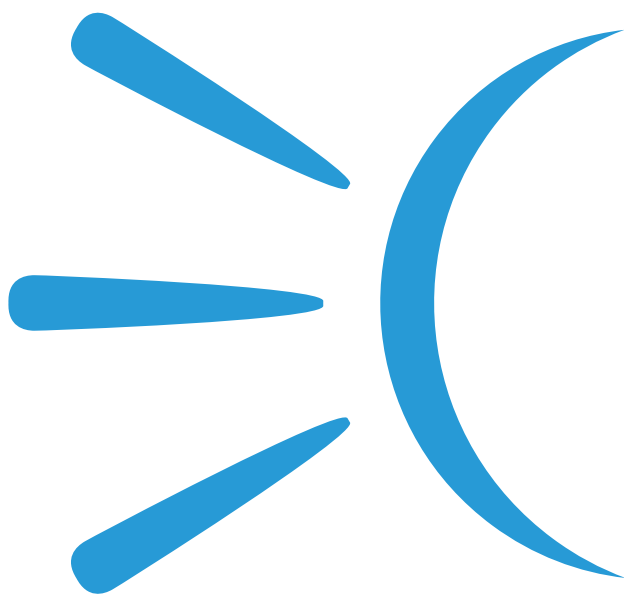


Geo-optimization performance

Whitepaper



Optimizing sales force mobility



Presentation

Optimizing movements, before, during and after they are undertaken, remains without a shadow of a doubt one of the main levers for improving mobile sales force operations.

The stakes are high, knowing that mobile workers frequently spend more than a third of their time on the road. Beyond the simple matter of time saving and transport costs, the stakes relate to other effects such as improving the company's carbon footprint, improving management efficiency, reducing stress at work, reducing team turnover...

This white paper provides a global perspective on this problem, a perspective that goes far beyond merely looking for the best route between two appointments or even taking it to the next level of the best visit schedule.

In the process, it aims to identify the chain of operations involved and establish the broad principles of the solutions that make it possible to optimize mobile sales force efficiency by better managing the territorial aspects of movements and business organizations.

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Sales force mobility

■ Before, during and after the business relationship

Paying a business visit is not a definite event that occurs at a single moment in time. It is the result of preparation, frequently has to be rescheduled and gives rise to different actions, analyses and follow-up.

One process, four phases

Undertaking business appointments is a veritable process with much of its effectiveness depending on what is done before or after the visit: choosing an appropriate time slot, determining a call sequence and travel time that limit the risk of being late or of cancellation, ability to reschedule in the event of a problem, continuous process improvement by analyzing the calls made (more or fewer calls, travel slots...)...

It is therefore possible to differentiate four phases within this process:



Specific participants, timelines and difficulties appear at each stage in this process:

- Mobile worker **organization** assumes a strategic dimension. It is within management's area of responsibility and sometimes involves the employees' representatives. The major principles of a business organization (by portfolio or sector, territory...) are generally stable over time. The modifications encountered are frequently to do with variations in the number of customers, call type and duration, the number of sales staff or else the setting up of support structures or ones that have a partially substitutional effect (telesales, e-commerce site, customer relationship service).
- Call **planning** is a matter for operational managers or the sales staff themselves. Based on the organization as defined, it aims to enable and optimize the creation of a call schedule tailored to the company's economic targets and the customers' service requirements.

Sales force mobility

- **Operations** management is the phase of actually making the calls. It calls for the previously established schedule to be revisited in real time. It is the responsibility of the sales staff themselves.
- Call monitoring and **analysis** is essentially down to the sales managers, the aim being to highlight areas for improving the process and its tools.

The role of geography

Geography is a very important dimension in the efficiency of the mobile sales force call process. Its role can be highlighted in each phase of the process:

Sectorisation

Balanced territories in terms of the number of customers, prospects or call locations and realistic in terms of the travel capacity combine to ensure operational efficiency.

Mobile assistance

On the ground, access to information on calls and itineraries and real time movement routing using geolocation tools provide organizational and planning activities with a seamless logic.



Geo-optimization of itineraries

Based on an organization which makes it possible, generating call schedules that minimize travel and maximize productive time cultivating the customer relationship delivers an unquestionable competitive advantage.

Geo-reporting

Analyzing operations as they unfold and their compliance with the work as it was planned makes it possible to identify problem territories and movements and define process improvements, which may extend to changing the organization itself.

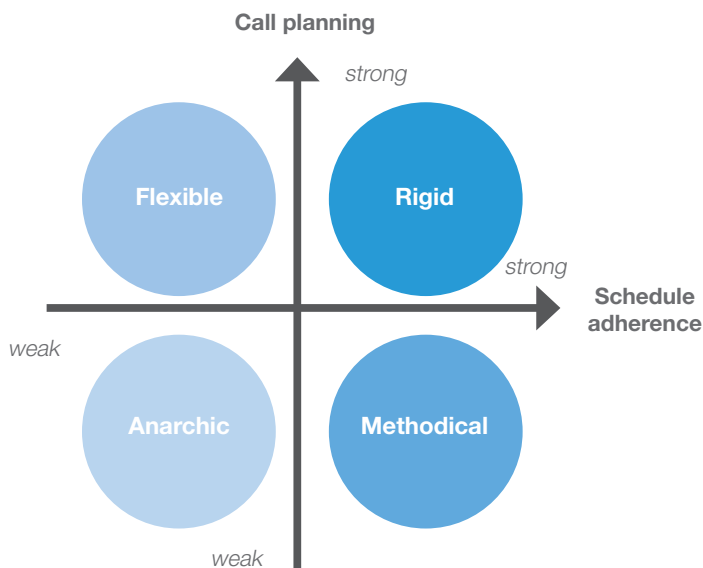
■ Practice and organization of mobile sales

Reality, both as it is experienced by organizations and in the running of mobile sales forces, differs markedly from one company to another and from one market to another. It is strongly influenced by the market itself, namely how the customers operate and the way in which they interact with the sales personnel, but also by the company's history and type of management.

Customer influence

The types of practices customers generate are defined by two variables: their ability (or desire) to plan calls in advance and their ability (or desire) to adhere to scheduled appointments.

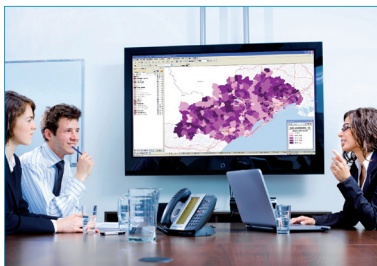
These variables generate four types of practices associated with the customers' profiles:



Sales force mobility

When it comes down to detail, these profiles frequently correspond to identifiable types of company and organization:

- **Anarchic:** the call is not really planned. The customer is generally present and available and has no predetermined agenda to which he adheres, apart from a number of “red lines” (opening hours, delivery hours, peaks in activity...). This is, for example, frequently the case for certain small businesses.
- **Flexible:** calls have to be planned but they are however fairly frequently modified. They can therefore cause significant waiting time or time overruns. The salesperson must be able to adapt. This is the case, for example, of small and medium enterprises that favour operational reactivity. This practice is also frequently as a result of a company “culture”.
- **Methodical:** the time and date is of minor importance just as long as it is scheduled and adhered. In this case, planning is possible, along with any adjustments provided they are thought of sufficiently in advance. The level of planning is low inasmuch as there is no recurrence. Examples are to be found in large companies and administrative organizations.
- **Rigid:** here, sticking to a schedule frequently imposed by the customer is an important condition of his satisfaction. This case is to be found in companies with a strong process culture. It also occurs when the call is a highly committing act for the customer. This is especially the case with appointments associated with an end to end business transaction: taking an order and merchandising in the retailing sector, signing a contract or installing a service in the home.



The three main types of organization

The way in which mobile sales forces are organised can differ greatly from one company to another. This difference is driven by two factors: the freedom of action granted to the sales people and, correspondingly, the level of support provided by associated tools or services (telesales or customer relationship, for example).

Ultimately, three types of organization can be distinguished depending on the share of the overall process for which the sales forces are responsible:



The less the responsibility, the greater the number of assistance and management tools required, in particular with a view to facilitating communication to do with call scheduling. In the most restrictive case ("the operators"), the organization is therefore handed over to the operations managers and support services (planners and call centre, for example).

Depending on the situation, the sales person's mobility – and thus his ability to cover the territory to best effect - will therefore be his responsibility or entrusted to operators upstream or down. By the same token, depending on the type of customer he is up against, his ability to organise himself to best effect is greater or lesser. **In all such cases geographical optimization tools that enable journeys optimized, calls in a logical sequence, optimizing itineraries, adapting the organization and their performance monitored are proving to be powerful drivers of economic efficiency.**

Optimizing mobility

■ The potential benefits of geo-optimization

Geo-optimization of the way mobile sales forces are organised and operate consists in using techniques and tools that make it possible to optimize the geographical dimension evident in each phase of the commercial process. Specifically, the benefits accruing to companies that have developed this type of approach fall into three categories.

Improve customer satisfaction

This issue is now the main priority of companies concerned with enhancing their value through greater leveraging of their customer portfolio.

The resulting options are as follows:

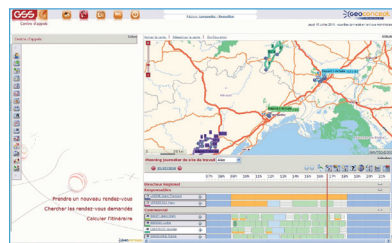
- complete the task on time, first time, every time ;
- ensure the best fit between the profile of the parties and the customers or prospects' needs ;
- reduce and adhere to appointment time windows ;
- cut times, delays and missed service levels ;
- cut the time between the appointment request and the appointment itself.

Increase the company's business efficiency

This internal objective is directly within the mobile sales' process area of responsibility.

It corresponds to the following options:

- increase the number of appointments per mobile worker within a given time slot ;
- reduce unproductive time and time spent in vehicles ;
- increase turnover by sales person ;
- invoice customers earlier by faster call planning ;
- improve the working conditions for the parties involved.



Ensure the company's economic, environmental and social objectives

Finally, and in a broader context, geo-optimization makes it possible to address a whole array of company objectives, such as:

- reducing mileage and time spent in vehicles (a gain of at least 30% for companies that have adopted this approach) for a given number of appointments ;
- reducing penalties resulting from failure to meet service levels ;
- reducing the time spent scheduling and confirming appointments ;
- the best sizing of the mobile workforce by means of variable hours contracts and subcontractors ;
- simulating planning in order to be able to optimize headcount, making it possible to deliver a given number of appointments ;
- reducing CO² emissions ;
- reducing stress and the accidents that go with it ;
- reducing turn-over.

■ The two principles of geo-optimization

■ Incorporating the geographical dimension into the very heart of the system

To derive the greatest possible benefit from the capacity for geographical optimization, work on this dimension must not be in isolation but at the very heart of the decision-making and operational business system.

Very simply: each customer and prospect must be assigned a geographical territory that allows analysis of market coverage, creation of an optimal sectorisation concept and the execution of perfectly designed call schedules. This geographical dimension can then be turned to advantage throughout the process and by all those involved in the debate. The telesales operator who will be able to locate appointments near to one another, the managers who are going to tailor territories to ensure realism and balance in the number of customers and prospects, the sales people who are going to be able to reschedule their itineraries in real time.

Optimizing mobility

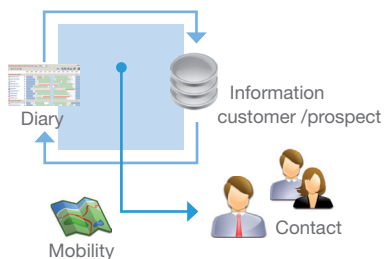
■ Going beyond geolocation

The key principle of geo-optimization is to integrate the geographical dimension into the process and put it at the very heart of the system.

Many companies have improved their mobility by providing their sales forces with tools enabling them to optimize – sometimes in real time – their movements or even itineraries. In these instances, however, the geographical dimension is edited downstream and without reference to the dimensions of time (the appointment diary) and customer's (the customer's attributes and value, explaining in particular the priority he has been given in the diary).

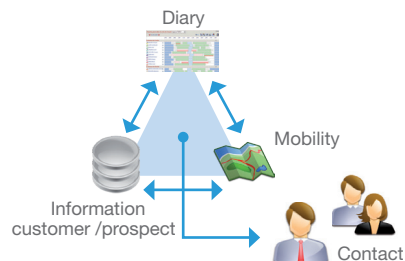
Conversely, geo-optimization aims to consider the three key dimensions of the sales process simultaneously: time, customers, geography.

From geolocation



The journey's geographical dimension is often not really optimized until after the journey (the sales and operations directors offer GPS devices to their mobile forces).

...to geo-optimization



Ideally, the geographical dimension is optimized concurrently with the journey decision. The improvement is greatly enhanced, inasmuch as the appointments are arranged from the outset in the order that facilitates geographical proximity.

■ Geo-optimization of mobility solutions

Mobile worker
organization

Call
Planning

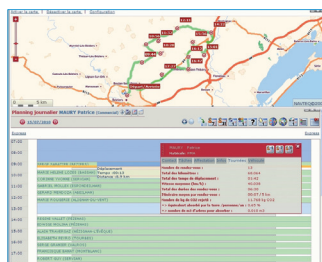
Operations
management

Monitoring and
analysis

Geomarketing solutions allow the potential of an area to be studied, current performance to be measured and to look at the required **sectorisation** and organization to address the market in the best possible way.

Combining the concepts of balanced potential, drive time between customers and prospects, history or even contiguous territories, automatic sectorisation tools facilitate the generation of an ideal **sales map**.

Combining diary, customer value and geography, **geo-scheduling** systems make it possible to create and modify itineraries while incorporating geographical considerations far upstream, from the moment the appointments are made...



Whether they feature geolocation components or not, **mobile assistance** systems provide all the necessary information for managing the geographical dimension in operation: directing movements, dynamic rerouting, searching for nearby customers/prospects...

Referred to as **geographical Business Intelligence**, reporting systems featuring a geographical function provide an ideal view of the geographical effectiveness of the way in which its activity is organised.

Feedback

■ Success factors in an optimization project

Optimizing mobile activities requires true integration of the geographical dimension into processes and business systems.

Users and experts present the major phases in facilitating this integration.

Their experience: **BHV, Atos Origin, JPGéo and GEOCONCEPT.**

Watch the video: https://www.youtube.com/watch?v=YVq_cTFuoeU

■ Sectorisation : the key to an efficient business organization

Out of balance, unrealistic...sales territories are usually unsuited to effective coverage of the market. Decision makers and experts present and discuss the critical factors in building and maintaining an efficient organization.

Their experience: **BERNER, IMS Health and GEOCONCEPT.**

Watch the video (only available in french):

https://www.youtube.com/watch?v=_glmDMNk5xY

Each profession has its own problems and solutions.

See the feedback from my sector:

<http://en.geoconcept.com/customer-references>

Geoptimization & Geomarketing

Knowing and analyzing its territory means taking the best advantage of it. Installation, targeting, sales development, delivery, customer loyalty... **Geomarketing puts the geographic intelligence at the heart of the processes and information systems.** GEOCONCEPT designs a complete range of expert solutions, rich of functionalities and web applications making easier exchanges between the parties involved within the enterprise.

Geoptimization & Mobility

The efficiency of the mobile forces is mainly based on the way they manage their space: **balanced and realistic sectoring, effective rounds, and optimized allocation of resources to sites.** GEOCONCEPT develops solutions which generate an important source of value, productivity and savings, and adapted to meet the different businesses and problems related to mobility.



For 24 years, GEOCONCEPT has been creating and deploying solutions for optimizing the geographical dimension of companies and organizations.

GEOCONCEPT SA's solutions have attracted more than 10,000 customers spanning very different sectors: Point P, Lyreco, Dell China, Système U, Société Générale, IMS Health, Berner, Osaka City Hall, Geneva Industrial Services, Paris Fire and Rescue Department, Darty, Pizza Hut, Citroën, BMW, L'Oréal, Orange...

Contact us for a presentation on implementing real life mobile sales force solutions:

www.geoconcept.com