Objective

You now have the ability to pull all of the essential pieces of a territory plan together in one place – using existing information that you already have in Salesforce.com. This way you can create and implement territory plans and strategies to win greater share of the potential business in your territory!

This is a step-by-step manual to help you get up-to-speed fast and begin benefiting from improved territory planning.

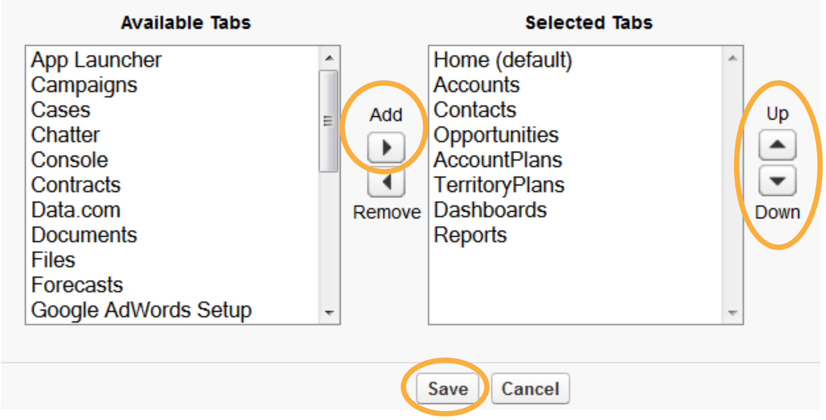
The TerritoryPlan Tab

One of your tabs should be setup to display: TerritoryPlans

Note: If you do not see this in your tab list, you can add the tab with these steps:

1) Click the "+" icon at the end of the tab list.
2) Click the "Customize my tabs" button on the 

far right.
3) Locate the "TerritoryPlans" item in the Available Tabs box on the left
4) Click the "Add" > button
5) Position the item in the "Selected Tabs" list in the order preferred using the up/down buttons. (optional)

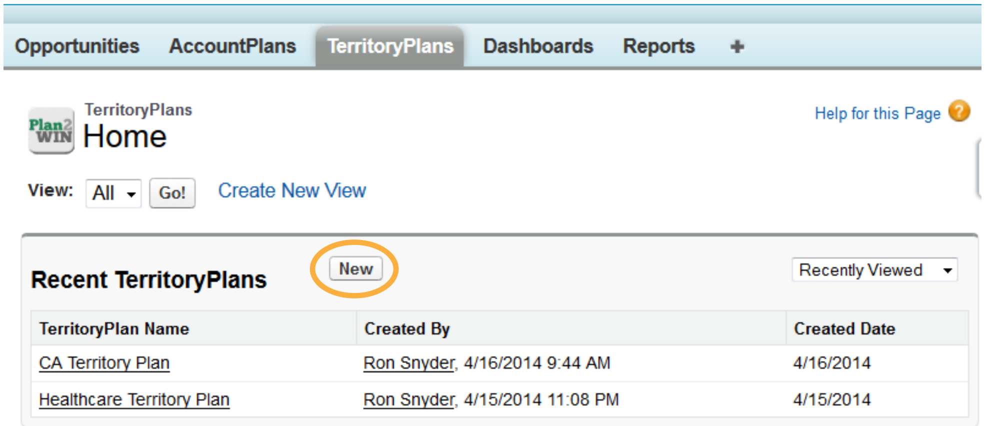


6) Save changes

You will now see the tab at the top of your Salesforce screen.

Creating a Territory Plan

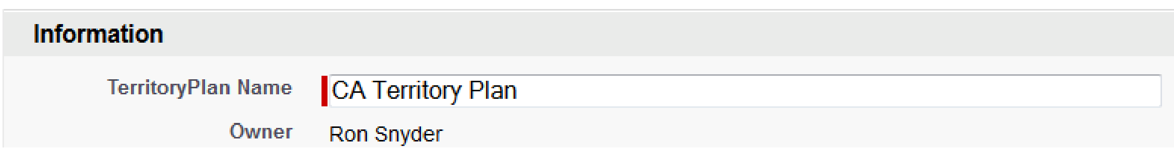
From the new TerritoryPlans tab, click the "New" button to create your plan.



After clicking the "New" button, you will be brought to an edit screen where you can begin to fill in several details. Fill in as much as you can initially; you will be able to update the information again later by clicking "edit" in the top menu.

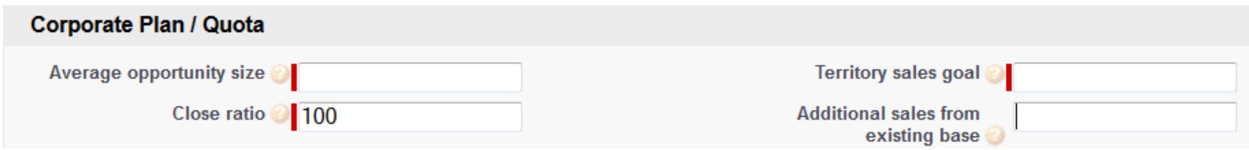
Plan Name

First, give your plan a name, like "FY2014 Territory Plan – your name or territory name".



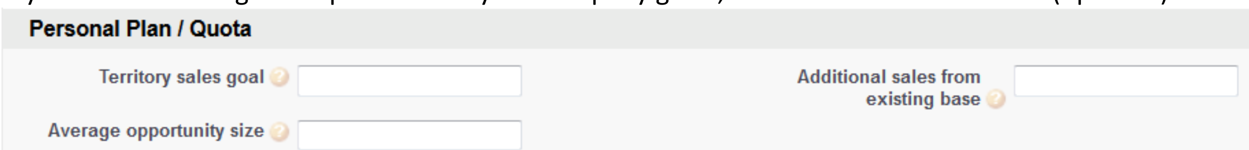
Corporate Plan/Quota

In this section, fill in the required fields (those with a red line to the left of the text fill in box).
Your Territory Sales Goal should come from your assigned sales goal, comp plan.
Adjust your close ratio to reflect your best estimate. 100% close ratio is the default.



Personal Plan/Quota

If you wish to track goals separate from your company goals, enter them in this section. (optional)

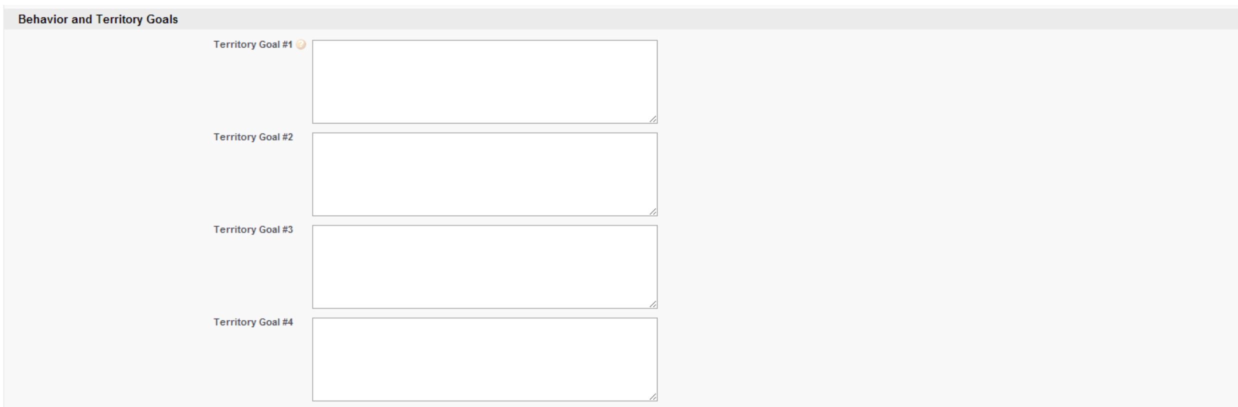


Territory Overview

In this section, include any facts or strategies regarding your territory.

Behavior and Territory Goals

The plan allows you to track up to four key goals regarding your territory. Enter them here.

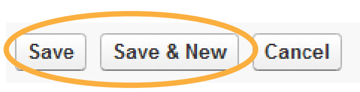


Narrative

The narrative is a description of your territory. You can also include any additional issues or factors regarding your territory in this section.

Save

Once you have added your information, save your plan or click save and new to save and create a new plan.



Note to User

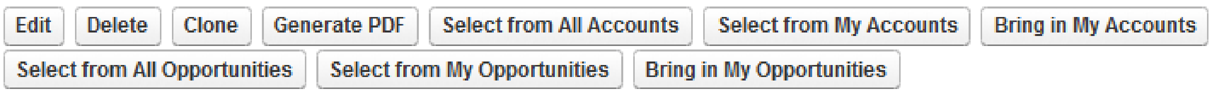
A few items to note:

- The "Sum of Closed Opportunities" and "Sum of Open Opportunities" simply sums of the values you have entered into the opportunity amount.
- "Close Ratio" (close rate) is the percentage of deals that go from opportunity to close.
- The information in your territory plan must be maintained on a regular basis in order to remain accurate and beneficial.

Buttons

These buttons, at the top and middle of the Territory Plan page, enable you to:

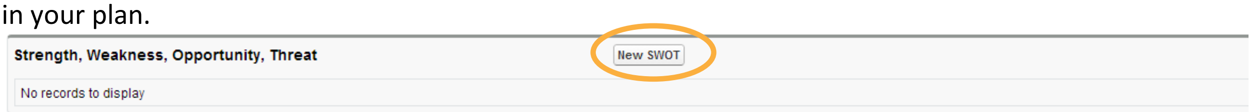
- Edit or Delete the plan
- Clone the top section of the plan
- Generate a pdf of the plan that can be saved or sent to an appropriate person
- Select which Accounts and Opportunities you want to include in the plan
- Note: the Select from All Accounts and All Opportunities buttons are optional. See you Salesforce.com admin if you want to use them.



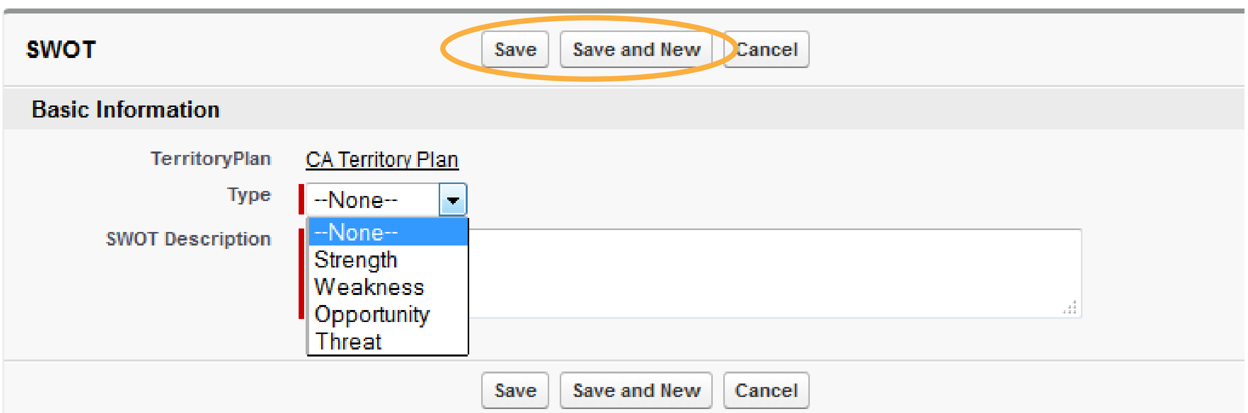
SWOT, Strategies, Activities

SWOT (Strength, Weakness, Opportunity, Threat)

Here you can track overall SWOT items for your territory. Click the "New SWOT" button create new items in your plan.

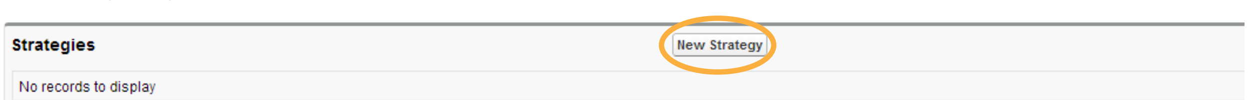


On the SWOT screen, select the correct type (Strength, Weakness, Opportunity, Threat) and then add your description. Save each item when finished. You can choose "save and new" to create a new SWOT.

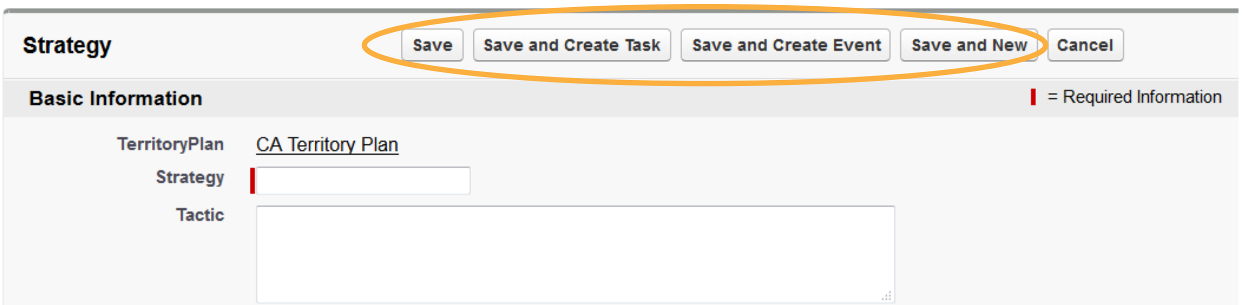


Strategies

Here you can track overall territory strategies and tactics. Click the "New Strategy" button create new items in your plan.

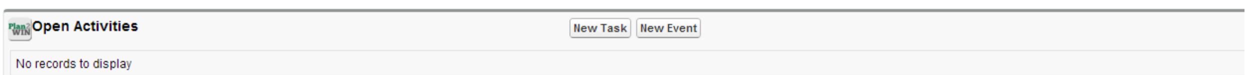


On the Strategy item screen, enter your strategy name and then add the associated tactic. Save each item when finished and repeat as needed. In order to create a follow up task or event, use the “Save and Create Task” or Save and Create Event” buttons. These will show up as Tasks and Events in your plan- in the section below- and Salesforce.com home screen.



Activities

The Territory Plan allows you to track Tasks and Events attributed to your plan. These function just like the activities elsewhere in Salesforce.

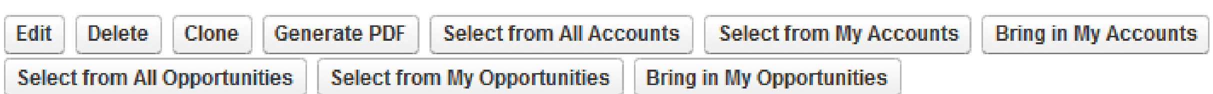


Target Accounts

Bringing in Your Target Accounts

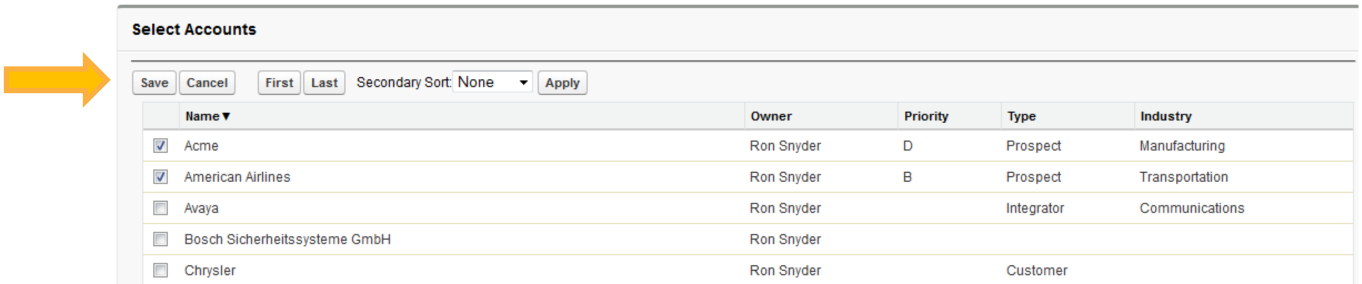
As part of your territory plan, you will be selecting your key accounts and “bringing them into the plan.”

At the top and middle of the territory plan main page, there are buttons that enable you to perform important functions. You may use either the “Select from All Accounts” button (if you are not the owner of the account in Salesforce.com) or the “Select from My Accounts” button if you are the Salesforce.com owner. ONLY use the “Bring in My Accounts” button if you want to bring in all of your accounts (this is not usually the case).



Selecting Target Accounts

Once you have clicked one of the select buttons for accounts, you will be given the "Select Accounts" screen. From here choose your account by clicking the checkbox on the left side of the screen for each account. The columns are sortable. Click on the column you wish to sort the list by. You can also choose a secondary sort by selecting the option at the top of the screen. There are buttons to go to the "First", "Next" (if there are more than 2 pages), and "Last" pages of the account list.



Select Accounts

Save | Cancel | First | Last | Secondary Sort: None | Apply

	Name ▼	Owner	Priority	Type	Industry
☑	Acme	Ron Snyder	D	Prospect	Manufacturing
☑	American Airlines	Ron Snyder	B	Prospect	Transportation
☐	Avaya	Ron Snyder		Integrator	Communications
☐	Bosch Sicherheitssysteme GmbH	Ron Snyder			
☐	Chrysler	Ron Snyder		Customer	

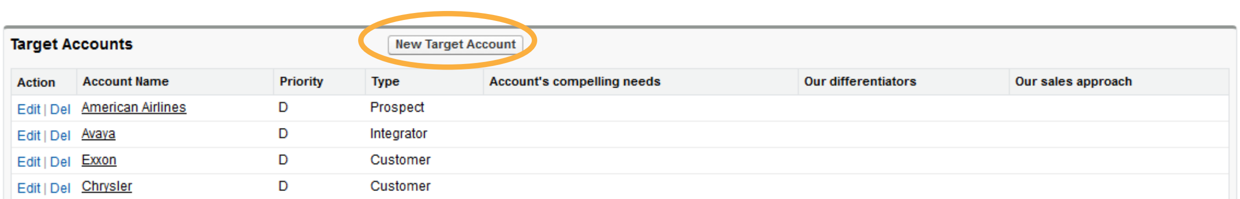
Save

When finished, click "Save".

Target Accounts

Back on the territory plan screen, scroll down to the "Target Accounts" section. Here you can review the list of accounts that you selected. This list allows you to see more detail about your accounts. If you selected any incorrectly, click the "Del" link to remove the record or go to the select account careen and "de-select" any that don't belong. Then repeat the selection step above again until you have your complete list of target accounts.

You can also click the "New Target Account" button and bring in one new account into the plan.



Target Accounts — New Target Account

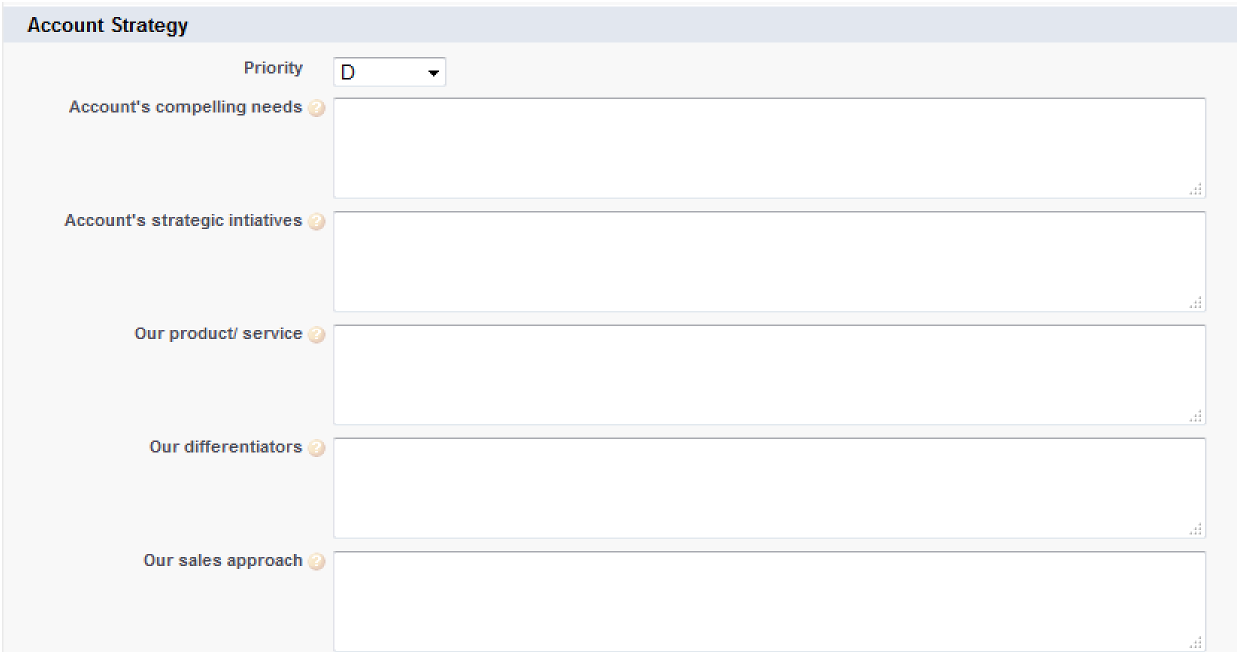
Action	Account Name	Priority	Type	Account's compelling needs	Our differentiators	Our sales approach
Edit | Del	American Airlines	D	Prospect			
Edit | Del	Avaya	D	Integrator			
Edit | Del	Exxon	D	Customer			
Edit | Del	Chrysler	D	Customer			

Updating Target Account Details

With your accounts selected, it is time to update the details. From the Target Account list, click the "Edit" link next to the account you wish to update.

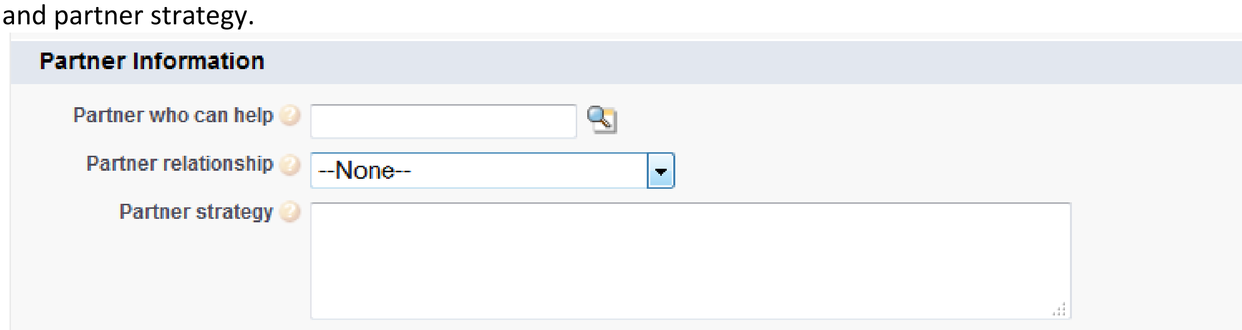
Account Strategy

In this section, you will need to select a priority for this account (the default is D) and then fill in several strategic fields regarding the account. Help tips are provided to guide your input.



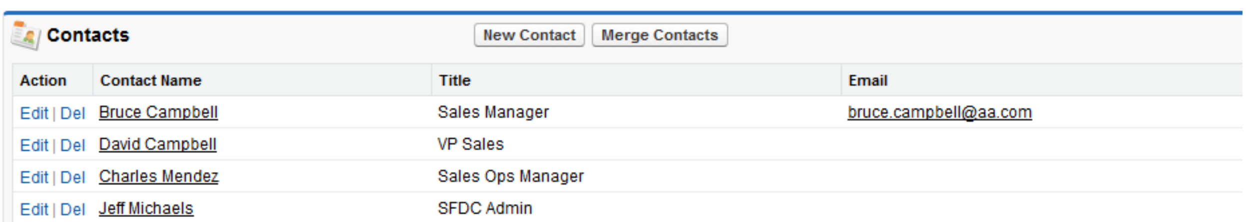
Account Partners

If you have a partner that you work with on the selected account, this section will show their information and partner strategy.



Account Contacts

If you have contacts identified in the contacts section of selected account, this section will show their information.



Action	Contact Name	Title	Email
Edit | Del	Bruce Campbell	Sales Manager	bruce.campbell@aa.com
Edit | Del	David Campbell	VP Sales	
Edit | Del	Charles Mendez	Sales Ops Manager	
Edit | Del	Jeff Michaels	SFDC Admin	

When you have added the information, it will be reflected in the Target Account section on the Territory Plan page.

Target Accounts New Target Account

Action	Account Name	Priority	Type	Account's compelling needs	Our differentiators	Our sales approach
Edit | Del	General Motors	A	Customer	Need better territory management	Improves visibility across territories Enables effective territory plan implementation	Leverage success elsewhere in the industry and partner contacts
Edit | Del	Global Media	B	Prospect	Need to improve sales effectiveness	Sales Planning capability Easy to use and learn Cost effective	Contact key decision makers and discuss needs and our solution
Edit | Del	American Airlines	B	Prospect	Need to increase sales to existing accounts	Provides greater insight Ensures successful plan implementation Leverages market insights	Leverage current contacts to meet with decision makers

Target Opportunities

Bringing in Your Target Opportunities

As part of your territory plan, you will be selecting your key opportunities to "bring into the plan."

At the top and middle of the territory plan main page, there are buttons that enable you to perform important functions. You may use either the "Select from All Opportunities" button (if you are not the owner of the opportunity in Salesforce.com) or the "Select from My Opportunities" button if you are the Salesforce.com owner. ONLY use the "Bring in My Opportunities" button if you want to bring in all of your opportunities (this is not usually the case).

Edit | Delete | Clone | Generate PDF | Select from All Accounts | Select from My Accounts | Bring in My Accounts
Select from All Opportunities | Select from My Opportunities | Bring in My Opportunities

Selecting Target Opportunities

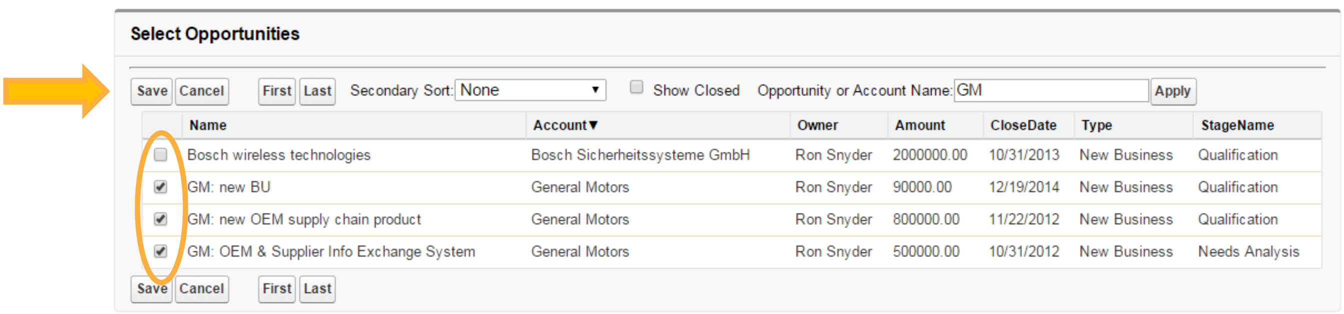
Once you have clicked the select button for opportunities, you will be given the "Select Opportunities" screen. From here choose each opportunity by clicking the checkbox on the left side of the screen for each record. Include all relevant opportunities (open, won, and lost) so as to show a complete picture of how your territory is performing. In this screen, the columns are sortable. For example, the example below has been sorted by the opportunity "Type" column. You can also choose a secondary sort by selecting the option at the top of the screen.

You can check the box "Show Closed" to have closed opportunities shown in the page list. Otherwise only open opportunities are shown.

In addition, in the search box to the right of "Opportunity or Account Name," you can enter a string of characters that you want to search on in the account or opportunity name fields and it will return a list that meet that criteria.

The "First", "Next", and "Last" buttons will navigate the appropriate pages of the opportunity list.

When finished, click "Save".



Important Note:

Add opportunities into your plan as you create new opportunities to keep your plan up to date.

Target Opportunities

Back on the territory plan screen, scroll down to the “Target Opportunities” section. Here you can review the list of opportunities that you selected. This list allows you to see more detail about your opportunities. If you selected any incorrectly, click the “Del” link to remove the record or you can go back to the select opportunity screen and “de-select” any that don’t belong. Then repeat the selection step above again until you have your complete list of opportunities.
You can also click the “New Target Opportunity” button and bring in one new account into the plan.

Target Opportunities New Target Opportunity

Action	Opportunity Name	Account Name	Type	Amount	Stage	Probability (%)	Close Date
Edit | Del	Global Media- 500 parts	Global Media	Existing Business	$50,000.00	Value Proposition	50	9/12/2012
Edit | Del	salesforce.com	salesforce.com	Existing Business	$350,000.00	Qualification	10	9/21/2012
Edit | Del	Hawaii Med Ctr Network	Hawaii Med Center	Existing Business	$800,000.00	Proposal/Price Quote	75	1/31/2014
Edit | Del	Global Media: new product 4	Global Media	Existing Business	$30,000.00	Qualification	10	4/30/2014
Edit | Del	salesforce 4000 widgetts	salesforce.com	Existing Business	$40,000.00	Needs Analysis	20	4/30/2014

Updating Target Opportunity Details

With your opportunities selected, it is time to update the details. From the Target Opportunity list, click the “Edit” link next to the opportunity you wish to update (see above).

Target Opportunity Strategy

In this section, you will need to fill in several strategic fields regarding the opportunity. Help tips are provided to guide your input.

Important Note:

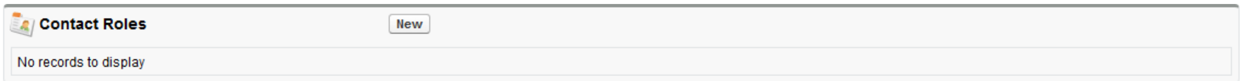
After you save the Opportunity Strategy for the first time, 3 additional sections will appear below (see next page).
When you edit your Opportunity Strategy, be sure to update and save your strategy information (above) before entering information in the screen section below… as indicated on the page:

Please save your edits to the above Opportunity Strategy section before making changes to the sections below.

Target Opportunity Details continued

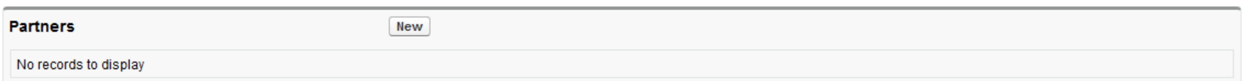
Target Opportunity Contact Roles

This section will bring in Contact Roles from the Opportunity object and you can add new contact roles that will show up on this screen.
Click Save when done.



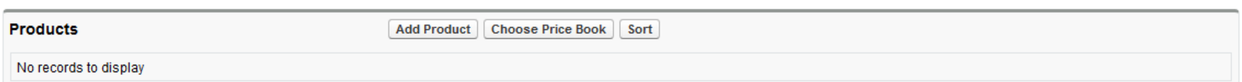
Target Opportunity Partners

This section is the same on the Opportunity itself. Any changes here will reflect on your opportunity as well (and vice versa).
Click Save when done.



Target Opportunity Products

This will mirror the products listed on your opportunity.
Click Save when done.

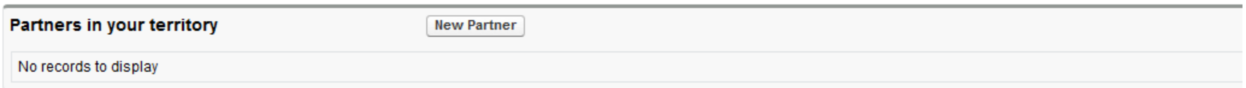


Other Features of the Territory Plan

From the main Territory Plan screen, there are a few other features.

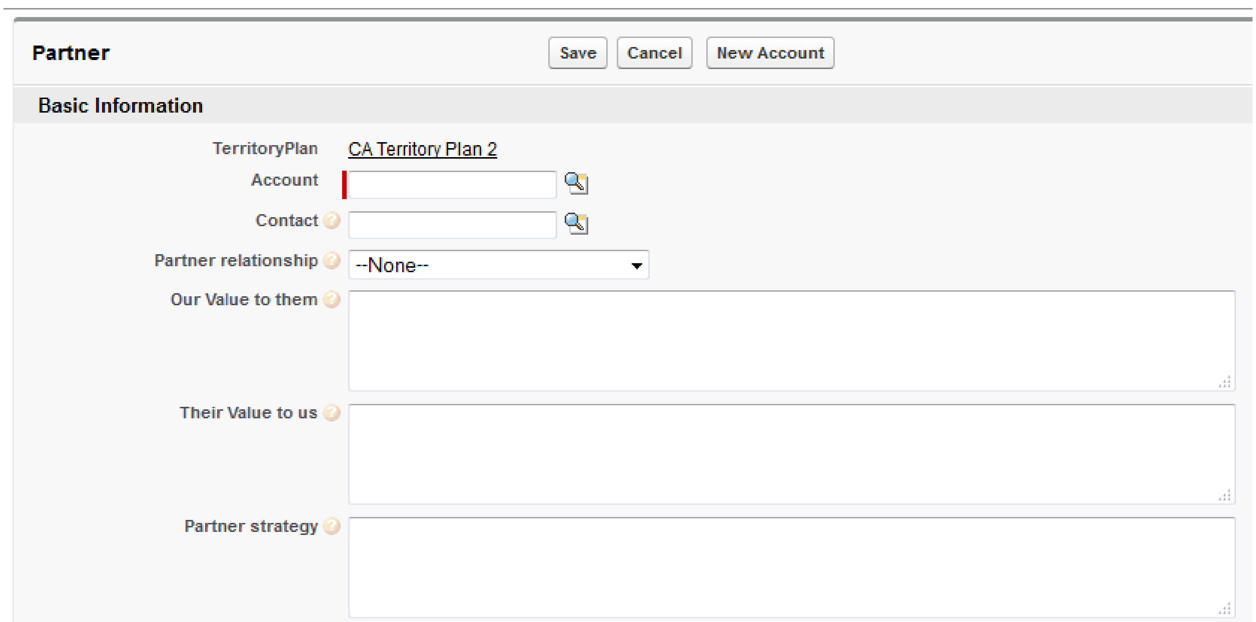
Partners in your territory

Similar to tracking partners on specific accounts and opportunities, you can also track partners more broadly as applied to your Territory. To add a new Partner to your plan, click the "New Partner" button in the Partners in your territory section.



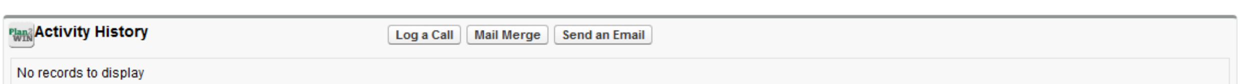
Partner Information

Note: the partner must be an account in Salesforce. If the partner is already an account in Salesforce, select it in the Account field- you can use the look up. If it is not an account in Salesforce, you can click New Account and enter a new "partner" account.
You can also select your main contact at this partner. Identify your relationship, value, and strategy, and then save your changes. Save and repeat for all partners you wish to track. Click Save when done.



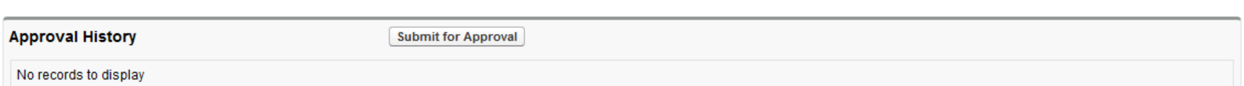
Activity History

A history of the activities that were registered in the plan will be saved in this section.



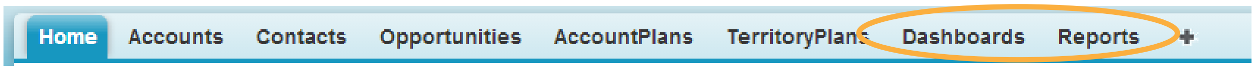
Approval

If your company requires you to submit your plan for review, that will be done in this bottom section.



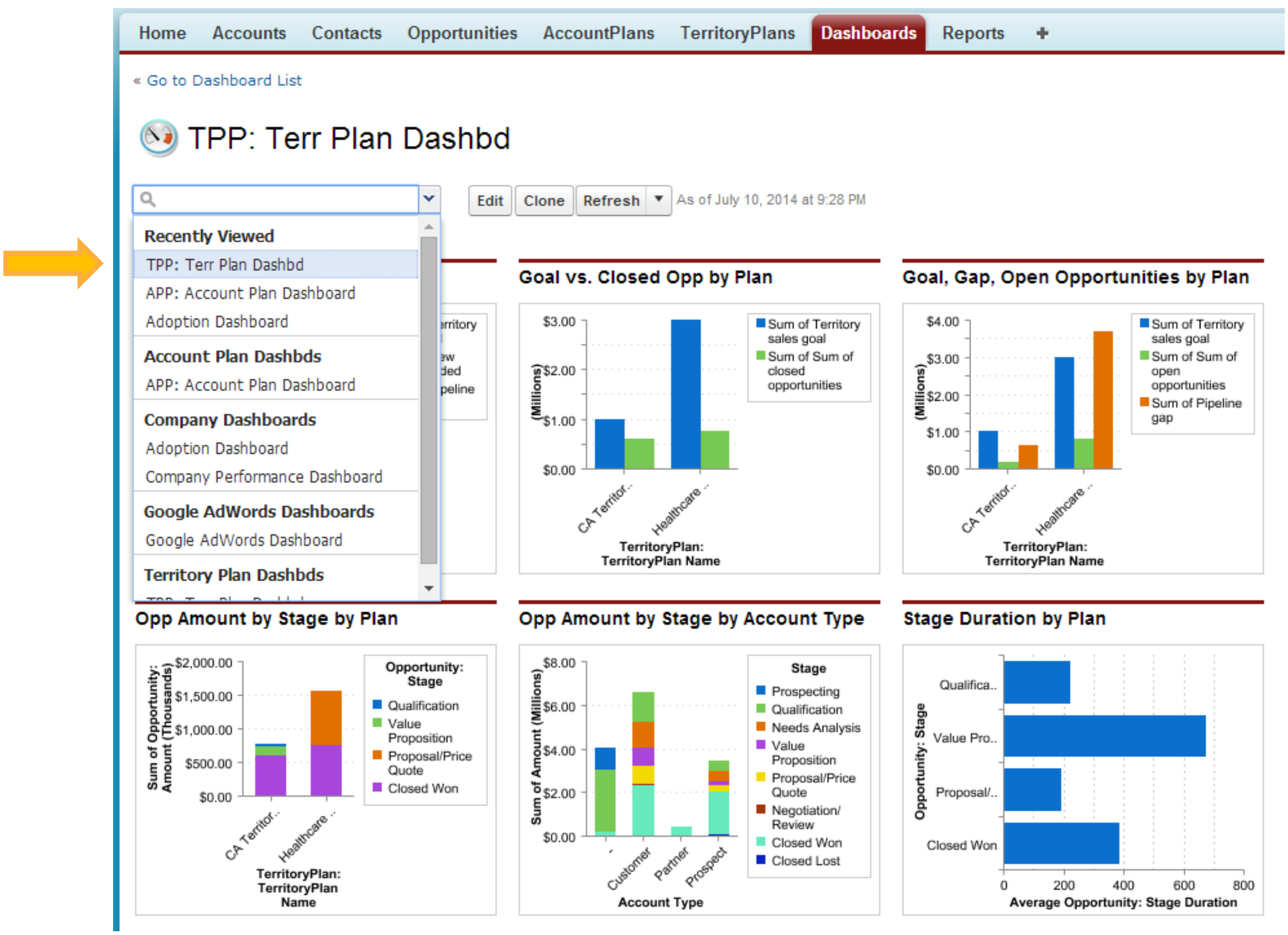
Dashboard and Reports

Access the Territory Plan Pro Dashboard and Reports via the menu at the top.



Dashboard

Select the Territory Plan Pro Dashboard by clicking the dashboard menu.
You can click on any of the graphs and it will take you to that report. You will be able to view the graph in larger format and the report details behind it.



Reports

Select the Territory Plan Pro Reports by clicking the Reports menu.
You can click on any of the reports and it will take you to that report. You will be able to view the graph and the report details behind it.