

OVERVIEW

Territory Plan Pro for Salesforce.com is an integrated application that enables Territory Managers to create and execute Territory Plans to improve sales results.

It is designed to respond to the 7 requirements of an Effective Sales Planning app:

1. Enable creation of strategic plans - shifting from a tactical approach
2. Prioritize accounts and opportunities
3. Execute plans by having them in Salesforce.com
4. Provide visibility for Sales Management and Territory Managers via reports and dashboard
5. Straight-forward, easy to use and learn
6. Works with your sales approach
7. Good Value in dollars and training time

DESCRIPTION

Territory Planning is designed to enable Territory Managers to create and implement territory plans to improve sales results. Typically, the planning process is performed at least once per quarter. It is used to guide the sales executive through all of the activities and pitfalls with running his or her top territory. Just as useful for a vertical focus, Territory Plan Pro provides the focus needed to achieve sales goals.

KEY FEATURES

Account Plan Pro enables improved Account Management by providing the following features:

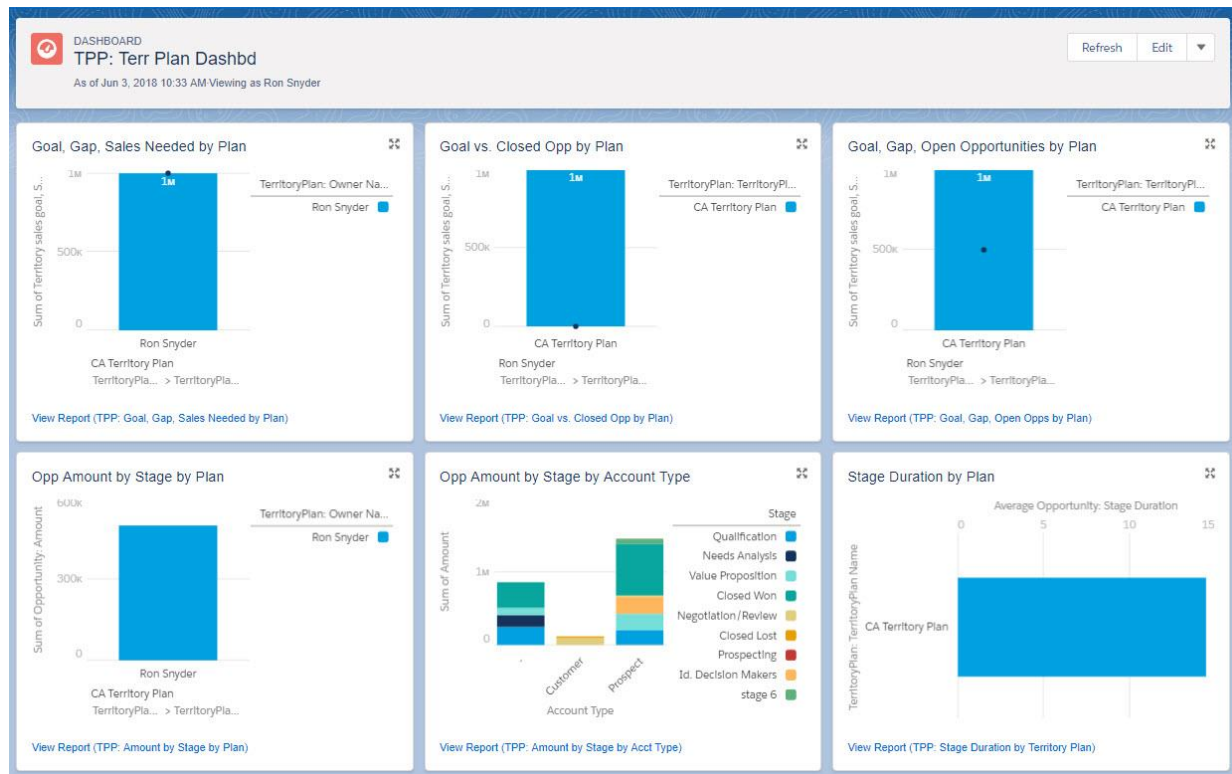
- Template for creating a sales territory plan that covers all key topics for effective territory management
- Pipeline information updates and shows progress vs. sales goals
- Dashboard and Reports enable account managers and sales managers to monitor progress and direct activities to achieve goals
- Generates pdf of plan to share with others
- Access the app via web browser or Salesforce 1 Mobile
- Works in both Lightning and Classic user interfaces

FEATURES & BENEFITS

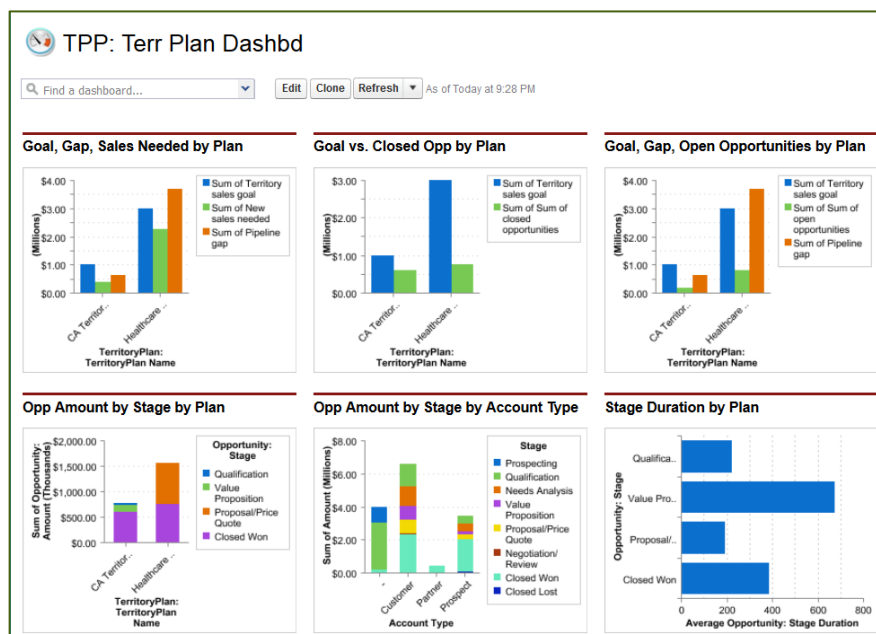
- ✓ **Standardize** the planning process across the entire sales force
- ✓ Enter quota, opportunity size; **app calculates number of deals needed**
- ✓ **The app calculates** sum of closed and open opportunities
- ✓ **Funnel requirement** and gap calculated by app- based on close ratio
- ✓ **Easily bring accounts and opportunities** into the plan via Select Account and Select Opportunity functions
- ✓ **Build a territory strategy and plan**; leveraging SWOT analysis
- ✓ Create a list of **target accounts and opportunities**
- ✓ **Create partner relationship strategies**
- ✓ **Generate tasks and events for each strategy**
- ✓ **Route** the plan to the manager for review, approval
- ✓ **Generate a PDF of the plan**
- ✓ **Reports and dashboards** to track and guide progress
- ✓ **Access plans** via a web browser or Salesforce 1 Mobile
- ✓ **User Interfaces:** both Classic and Lightning user interfaces

Dashboard for effective Territory Management

LIGHTNING UI DASHBOARD



CLASSIC UI DASHBOARD



Reports provide insight for plan implementation and management.

LIGHTNING UI REPORTS

Reports
All Folders > Territory Plan Reports
15 Items • Sorted by Report Name

New Report

REPORTS	REPORT NAME ↑	DESCRIPTION	FOLDER	LAST MODIFIED BY	SUBSCRIBED
Recent	TPP: Activities, Strategy by ...		Territory Plan Reports	Ron Snyder	☐ ▾
Created by Me	TPP: Amount by Opp Type ...		Territory Plan Reports	Ron Snyder	☐ ▾
Private Reports	TPP: Amount by Stage by A...		Territory Plan Reports	Ron Snyder	☐ ▾
Public Reports	TPP: Amount by Stage by P...		Territory Plan Reports	Ron Snyder	☐ ▾
All Reports	TPP: Goal vs. Closed Opp b...		Territory Plan Reports	Ron Snyder	☐ ▾
FOLDERS	TPP: Goal, Gap, Additional ...		Territory Plan Reports	Ron Snyder	☐ ▾
Created by Me	TPP: Goal, Gap, Open Opp...		Territory Plan Reports	Ron Snyder	☐ ▾
Shared with Me	TPP: Goal, Gap, Sales Nee...		Territory Plan Reports	Ron Snyder	☐ ▾
All Folders	TPP: Stage Duration by Ter...		Territory Plan Reports	Ron Snyder	☐ ▾
FAVORITES	TPP: Stage Duration Histor...		Territory Plan Reports	Ron Snyder	☐ ▾
All Favorites	TPP: Territory Plan Summary		Territory Plan Reports	Ron Snyder	☐ ▾
	TPP: Territory Plan Summa...		Territory Plan Reports	Ron Snyder	☐ ▾
	TPP: Top Opportunities by ...		Territory Plan Reports	Ron Snyder	☐ ▾
	TPP: Top Opps by Type by ...		Territory Plan Reports	Ron Snyder	☐ ▾
	TPP: Usage Report		Territory Plan Reports	Ron Snyder	☐ ▾

CLASSIC UI REPORTS

Reports & Dashboards

New Report... New Dashboard...

Folders

Find a folder...

All Folders

- Unfiled Public Reports
- My Personal Custom Reports
- My Personal Dashboards
- Account Plan Dashbds (Installed Package: Territory Plan Reports)
- Account Plan Reports (Installed Package: Territory Plan Reports)
- Company Dashboards
- Google AdWords Dashboards (Installed Package: Territory Plan Reports)
- Google AdWords Reports (Installed Package: Territory Plan Reports)
- Territory Plan Dashbds (Installed Package: Territory Plan Reports)
- Territory Plan Reports (Installed Package: Territory Plan Reports)
- Account and Contact Reports
- Opportunity Reports
- Sales Reports
- Lead Reports
- Support Reports
- Campaign Reports
- Self-Service Reports
- Administrative Reports
- Activity Reports
- Product and Asset Reports
- Call Center Reports

Territory Plan Reports (Installed Package: Territory Plan)

Find reports and dashboards...

Action	Name ↑
▾	TPP: Activities, Strategy by Plan
▾	TPP: Amount by Opp Type by Plan
▾	TPP: Amount by Stage by Acct Type
▾	TPP: Amount by Stage by Plan
▾	TPP: Goal vs. Closed Opp by Plan
▾	TPP: Goal, Gap, Additional Sales by Plan
▾	TPP: Goal, Gap, Open Opps by Plan
▾	TPP: Goal, Gap, Sales Needed by Plan
▾	TPP: Stage Duration by Territory Plan
▾	TPP: Stage Duration History by Stage
▾	TPP: Territory Plan Summary
▾	TPP: Territory Plan Summary By Date
▾	TPP: Top Opportunities by Plan
▾	TPP: Top Opps by Type by Plan
▾	TPP: Usage Report

1-15 of 15 ▾

LIGHTNING UI TERRITORY PLAN SCREEN

Bring in Opportunities, Contacts, Generate PDF

DETAILS

TerritoryPlan
CA Territory Plan

+ Follow Edit Select from My Accounts Select from My Opportunities Generate PDF Select from All Accounts

Related List Quick Links

- Strength, Weakness, Opportunity, Threat (4)
- Strategies (3)
- Target Accounts (3)
- Target Opportunities (4)
- Partners in your territory (1)

TerritoryPlan Name
CA Territory Plan

Owner
Ron Snyder

Corporate Plan / Quota

Average opportunity size	\$50,000
Close ratio	25%
Number of new wins needed	19
Territory sales goal	\$1,000,000
Sum of closed opportunities	\$60,000
Additional sales from existing base	\$0
New sales needed	\$940,000.00
Pipeline needed	\$3,760,000
Sum of open opportunities	\$250,000
Pipeline gap	\$3,510,000

Personal Plan / Quota

Territory sales goal	\$1,200,000
Average opportunity size	\$60,000
New sales needed	\$1,140,000
Additional sales from existing base	\$0

Territory Overview

Industry trends Impacting your territory
Challenges in meeting sales goals

Key trends In your geography
Economy still sluggish- except tech sector

App calculates Sales Needed, Pipeline Gap

Territory History, Trends

LIGHTNING UI TERRITORY PLAN SCREEN (CONTINUED)

Behavior and Territory Goals

Territory Goal #1 ⓘ

Increase sales to tech sector

Territory Goal #2

Build funnel by 30%

Territory Goal #3

Leverage current customer successes

Territory Goal #4

Build partner network

Territory Goals

Narrative

Territory narrative ⓘ

Leverage current successes and build partner network

Additional Issue / Info to consider ⓘ

How to build partner network

System Information

Created By

 Ron Snyder, 5/31/2018 10:26 PM

Last Modified By

 Ron Snyder, 6/2/2018 2:12 PM

New Task

New Event

Tasks, Events

Create new...

Add

Activity Timeline

▼ ↺ Expand All

Next Steps

More Steps

>  ☐ leverage current customers

You have an upcoming Task

Jun 15 ▼

>  ☐ Create list of top influencers

You have an upcoming Task

Today ▼

Past Activity

>  Call key contacts

You had a Task

Today ▼

Load More Past Activities ▼

LIGHTNING UI TERRITORY PLAN SCREEN (CONTINUED)

Strength, Weakness, Opportunity, Threat (4)

SWOT Analysis

[New](#)

TYPE	SWOT DESCRIPTION	
Strength	New rev provides unique capabilities	▼
Weakness	Need to build visibility in market place	▼
Opportunity	Need for our new product in Tech Sector	▼
Threat	New, larger competitors entering market segment	▼
View All		

Strategies (3)

Strategies and Tactics

[New](#)

STRATEGY	TACTIC	
Build funnel	Generate email campaign	▼
leverage current customers	call current customers	▼
win top influencers	list of top influencers	▼
View All		

Target Accounts (3)

Target Accounts

[New](#)

ACCOUNT NAME	PRIORITY	TYPE	ACCOUNT'S COMPELLING NEEDS
Global Media	A	Prospect	Need to improve sales effectiveness
General Motors	B		Need better territory management
American Airlines	B		Need to increase sales to existing accou...
View All			

Target Opportunities (3)

Target Opportunities

[New](#)

OPPORTUNITY NAME	ACCOUNT NAME	STAGE	AMOUNT
Global Media Sales Planning Apps	Global Media	Id. Decision Makers	\$90,000.00
American Airlines: Account Plan Pro	American Airlines	Needs Analysis	\$100,000.00
GM: Territory Plan Pro	General Motors	Needs Analysis	\$60,000.00
View All			

Partners in your territory (1)

Partners

[New](#)

ACCOUNT NAME	CONTACT	PARTNER RELATIONSHIP	OUR VALUE TO THEM
IBM Local	Linda Hunt		We provide products IBM customers need
View All			

CLASSIC UI TERRITORY PLAN SCREEN: GOALS, NUMBERS, TERRITORY OVERVIEW

TerritoryPlan

[Customize Page](#) | [Printable View](#) | [Help](#)

[Show Feed](#)

[Strength, Weakness, Opportunity, Threat \[4\]](#) | [Strategies \[3\]](#) | [Open Activities \[3\]](#) | [Target Accounts \[3\]](#) | [Target Opportunities \[3\]](#) | [Partners in your territory \[1\]](#) | [Activity History \[3\]](#) | [App](#)

TerritoryPlan Detail

[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](#)

TerritoryPlan Name
CA Territory Plan

Owner
 Ron Snyder [\[Change\]](#)

Corporate Plan / Quota

Average opportunity size \$100,000	Territory sales goal \$1,000,000	Bring in Accounts and Opportunities. Generate PDF.
Close ratio 50%	Sum of closed opportunities \$600,000	
Number of new wins needed 4	Additional sales from existing base \$0	
	New sales needed \$400,000.00	
	Pipeline needed \$800,000	
	Sum of open opportunities \$30,000	
	Pipeline gap \$770,000	

Personal Plan / Quota

Territory sales goal \$1,250,000	New sales needed \$650,000
Average opportunity size \$100,000	Additional sales from existing base \$0

Territory Overview

Industry trends impacting your territory	Challenges in meeting sales goals	App calculates Sales Needed, Pipeline Gap.
Key trends in your geography	Economy still sluggish- except tech sector	

Behavior and Territory Goals

Territory Goal #1	Increase sales to tech sector	Identify Trends.
Territory Goal #2	Build funnel by 30%	
Territory Goal #3	Leverage current customer successes	
Territory Goal #4	Build partner network	

Narrative

Territory narrative	Leverage current successes and build partner network	Identify Goals.
Additional issue / info to consider	How to build partner network	

TERRITORY PLAN SCREEN: SWOT, STRATEGIES, ACTIVITIES

Strength, Weakness, Opportunity, Threat
New SWOT

Action	Type	SWOT Description
Edit Del	Strength	New rev provides unique capabilities
Edit Del	Weakness	Need to build visibility in market place
Edit Del	Opportunity	Need for our new product in Tech Sector
Edit Del	Threat	New, larger competitors entering market segment

Strategies
New Strategy

Action	Strategy	Tactic
Edit Del	Build funnel	Generate email campaign
Edit Del	Create Tech Sector focus program	Generate Tech Sector plan
Edit Del	win top influencers	list of top influencers


Open Activities
New Task
New Event

Action	Subject	Name	Task	Due Date	Status	Priority
Edit Cls	Generate email campaign: Build funnel		☒	1/22/2016	Waiting on someone else	Normal
Edit Del	Meet re Tech Sector focus program	Charles Mendez	☐	1/29/2016 10:30 AM		
Edit Cls	win top influencers: create list		☒	2/5/2016	Not Started	Normal

Conduct
SWOT Analysis.

Generate Strategies
and Tactics.

From Strategies, generate Tasks & Events; connecting strategies to action.

TERRITORY PLAN SCREEN: OPPORTUNITIES, RELATIONSHIPS, TEAM, PARTNERS, ACTIVITIES

Target Accounts

New Target Account

Action	Account Name	Priority	Type	Account's compelling needs	Our differentiators	Our sales approach
Edit Del	Global Media	A	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	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	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

New Target Opportunity

Action	Opportunity Name	Account Name	Type	Amount	Stage	Probability (%)	Close Date
Edit Del	GM: Territory Plan Pro	General Motors	Existing Business	\$600,000.00	Closed Won	100	9/16/2012
Edit Del	American Airlines: Account Plan Pro	American Airlines	New Business	\$20,000.00	Qualification	10	9/30/2013
Edit Del	Global Media: Sales Planning apps	Global Media	New Business	\$10,000.00	Qualification	10	4/30/2014

Partners in your territory

New Partner

Action	Account Name	Contact	Partner relationship	Our Value to them	Their Value to us	Partner strategy
Edit Del	IBM Local	Linda Hunt	Strategic Alliance (Local)	We provide products IBM customers need	IBM has great contacts	Leverage IBM contacts to sell into their accounts

Activity History

[Log a Call](#)
[Mail Merge](#)
[Send an Email](#)
[View All](#)

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	ID x-sell opp list		☒	7/18/2014	Ron Snyder	7/10/2014 10:13 PM
Edit Del	Meet with Linda Hunt re collaboration	Linda Hunt	☐	4/29/2014 11:30 AM	Ron Snyder	4/16/2014 9:48 AM
Edit Del	sell new service: ID candidates- list		☒	4/18/2014	Ron Snyder	7/10/2014 10:12 PM

Prioritize and include Target Accounts, Opportunities, and Partners.

Activity History

TARGET ACCOUNT STRATEGY

Target Account

[Save](#)
[Cancel](#)
[New Account](#)

Plan Information

TerritoryPlan: [CA Territory Plan](#)
Account: [Global Media](#)

Account Strategy

Priority: [A](#)

Account's compelling needs: [Need to improve sales effectiveness](#)

Account's strategic initiatives: [Bring in sales planning tools in SFDC](#)

Our product/ service: [Account and Territory Planning apps in SFDC](#)

Our differentiators: [Sales Planning capability
Easy to use and learn
Cost effective](#)

Our sales approach: [Contact key decision makers and discuss needs and our solution](#)

Partner Information

Partner who can help: [IBM Local](#)

Partner relationship: [Strategic Alliance \(Local\)](#)

Partner strategy: [Have Linda Hunt introduce us to VP of Sales](#)

Generate Strategy for each Target Account

TARGET OPPORTUNITY STRATEGY

Target Opportunity

Save

Cancel

New Opportunity

Plan Information

TerritoryPlan

CA Territory Plan

Opportunity

Global Media: Sales Planning apps

Opportunity Strategy

Account's compelling needs/ events

Need to improve sales effectiveness to increase sales results by 20%

Our product / service

Account Plan Pro
Territory Plan Pro

Account's decision criteria

Apps in SFDC
Help sales team do better sales planning

Our differentiators

Sales Planning in SFDC
Easy to use and learn
Cost effective

Account's decision process

Search for sales planning apps
Review apps
Team decides

Account's funding/ budget process

VP Sales submits to President
President approves

Next steps

Contact key decision makers and discuss needs and our solution

Generate Opportunity Strategy for each Opportunity.

SELECT ACCOUNTS OPPORTUNITIES SCREEN

SELECT ACCOUNT AND OPPORTUNITIES:

1. Check the box on the left of the name of the accounts or opportunities you want to include in the plan.
2. Click on the column header (Name, Owner, etc.) to sort the table by that parameter.
You can do a secondary sort by selecting the secondary sort and then apply. You can search by Account Name.

You can choose to show closed opportunities. Otherwise only open opportunities are shown.
You can search by Opportunity or Account Name.

Save

Cancel

First

Last

Secondary Sort: None

Account Name: American

Apply

Name ▼	Owner	Priority	Type	Industry
☒ American Airlines	Ron Snyder	B	Prospect	Transportation
☐ American Cement Co	Ron Snyder			Construction

Save

Cancel

First

Last

Select Accounts to include in plan.

Select Opportunities to include in plan.

Can show closed opportunities or only open opportunities.

Can show opportunities based on a string of characters.

Save

Cancel

First

Last

Secondary Sort: None

☒ Show Closed

GM

Apply

Name	Account ▼	Owner	Amount	CloseDate	Type	StageName
☒ GM: new BU	General Motors	Ron Snyder	90000.00	3/31/2016	New Business	Qualification
☒ GM: Territory Plan Pro	General Motors	Ron Snyder	60000.00	1/8/2016	Existing Business	Closed Won
☒ GM: OEM & Supplier Info Exchange System	General Motors	Ron Snyder	500000.00	2/26/2016	New Business	Needs Analysis
☒ GM: new OEM supply chain product	General Motors	Ron Snyder	800000.00	11/22/2012	New Business	Qualification

Save

Cancel

First

Last

ADD ACCOUNTS AND OPPORTUNITIES INTO TERRITORY PLANS FROM ACCOUNT, OPPORTUNITY PAGES

Your Salesforce.com Admin can add the following sections to your Account and Opportunity pages. See our Set Up Guide.

Add Accounts into Territory Plans from the Account Page

The Account page will now have this section in it. Users can add the account into the Territory Plan from the Account page using this section.

Target Accounts (Account)		New Target Account	Target Accounts (Account) Help ?
Action	Target Account: Potential Account	TerritoryPlan Name	
Edit Del	0039	BT Mid Mkt Phoenix	

Insert Account into Territory Plan from Account page

Target Opportunities		New Target Opportunity	Target Opportunities Help ?
Action	Target Opportunity: Top Potential Prospect	TerritoryPlan Name	
Edit Del	0033	BT Mid Mkt Phoenix	

Insert Opportunity into Territory Plan from Opportunity page

REPORT: STRATEGY - ACTIVITY STATUS

Report tracks Strategy to Actions

ACTIVITY

STRATEGY & TACTIC

Subject	Comments	Priority ↑	Status	Date
☐ TerritoryPlan: Owner Name: Ron Snyder (3 records)				
TerritoryPlan: TerritoryPlan Name: CA Territory Plan (3 records)				
Meet re Tech Sector focus program	Strategy:Create Tech Sector focus program Tactic:Generate Tech Sector plan	-	-	1/29/2016
Generate email campaign: Build funnel	Strategy:Build funnel Tactic:Generate email campaign	Normal	Waiting on someone else	1/22/2016
win top influencers: create list	Strategy:win top influencers Tactic:list of top influencers	Normal	Not Started	2/5/2016
Grand Totals (3 records)				

PDF OF GOALS, NUMBERS, OVERVIEW

PDF provides time-stamped record of plan

Territory Plan: CA Territory Plan

Generated:01-14-2016

Corporate Plan/Quota

Average opportunity size	\$50,000	Territory sales goal	\$1,000,000
Close ratio	50%	Sum of closed opportunities	\$60,000
Number of new wins needed	19	Additional sales from existing base	\$0
		New sales needed	\$940,000.00
		Pipeline needed	\$1,880,000
		Sum of open opportunities	\$1,240,000
		Pipeline gap	\$640,000

Territory Overview

Industry trends impacting your business
Challenges in meeting sales goals

Key trends in your geography
Economy still sluggish- except tech

Behavior and Territory Goals

Territory Goal #1
Increase sales to tech sector

Territory Goal #2
Build funnel by 30%

Territory Goal #3
Leverage current customer success

Territory Goal #4
Build partner network

Narrative

Territory narrative
Leverage current successes and build partner network

Additional issue / info to consider
How to build partner network

SWOT

Strengths New product provides unique capabilities Opportunities Need for our new product in Tech Sector	Weaknesses Need to build visibility in market place Threats Entrenched competition
--	--

Target Accounts

Account	General Motors
Priority	A
Type	Customer
Account's compelling needs	Need better territory management

Strategies

Strategy	Build
Tactic	Generate
Strategy	Create

Opportunity

Account	General Motors
Amount	60000.0
Stage	Closed Won
Type	Existing Business
Close date	Jan 08 2016
Account's compelling needs/ events	Need to improve sales planning effectiveness
Our product / service	Territory Plan Pro
Account's decision criteria	Need Territory Planning app that works in SFDC
Our differentiators	Create plan easily, quickly Track strategies to action Manage plan implementation
Account's decision process	Review top 3 candidates Submit recommendation to VP Sales VP Sales decides
Account's funding/ budget process	Sales Manager submits to VP Sales VP Sales reviews with CFO for approval
Next steps	Meet with Sales Manager re solution to needs Meet with VP Sales and Sales Manager

SPECIFICATIONS

Publisher	Plan 2 Win Software
Type	Native Salesforce.com CRM application Works in both Lightning and Classic user interfaces Salesforce 1 Mobile ready
Salesforce.com AppExchange Partner	Yes
Pricing	\$170/year per user Ask about quantity discounts
	• 30 Day Site License, Free Trial by clicking “Get it now!” • Discounts available for purchases of 35 licenses and more... including Account Plan Pro • Includes user training for teams of 5 and more

REQUIREMENTS

Salesforce.com Edition	Professional Enterprise Unlimited
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Contact us to use our Territory Planning app for Group edition

Plan2Win Software

925-932-2007

info@Plan2WinSoftware.com