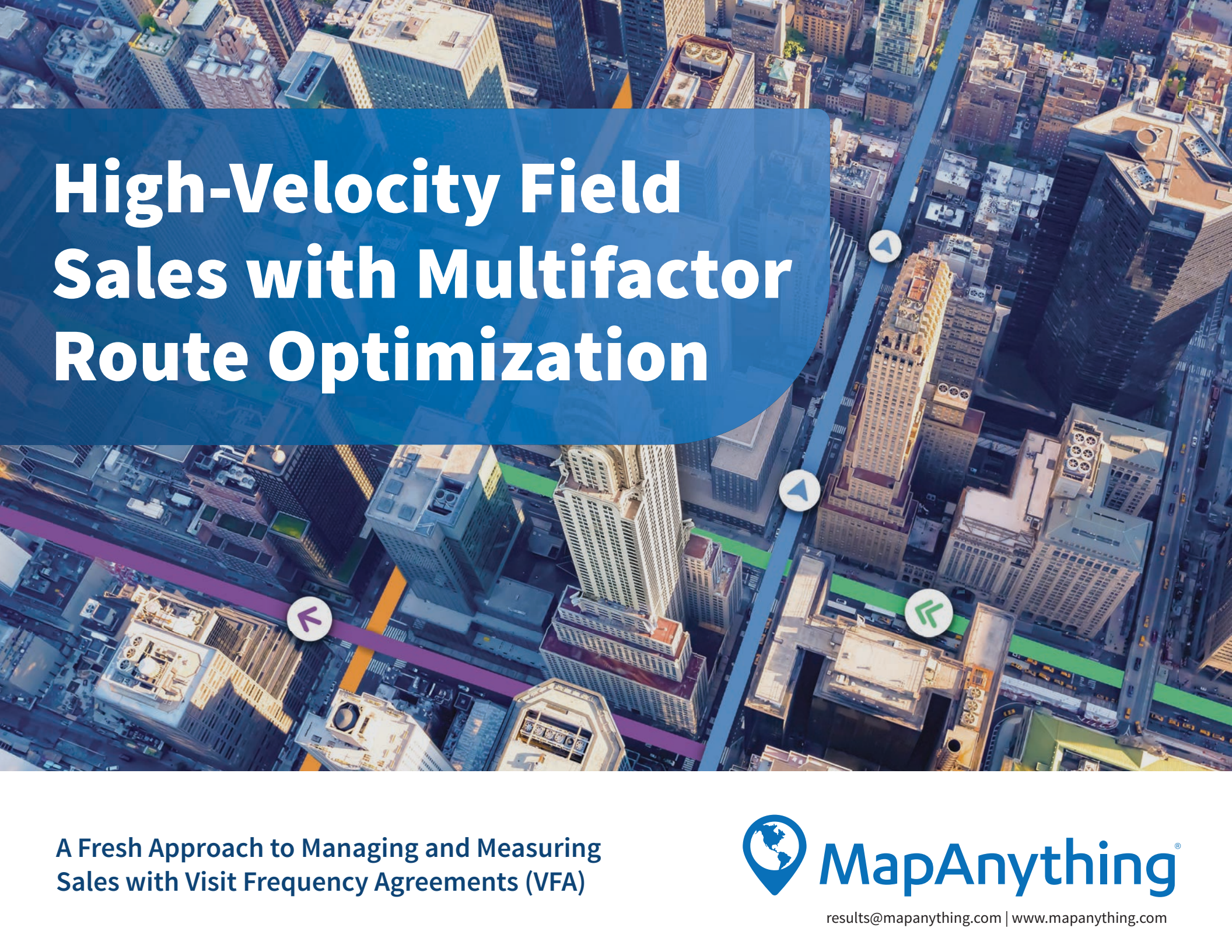


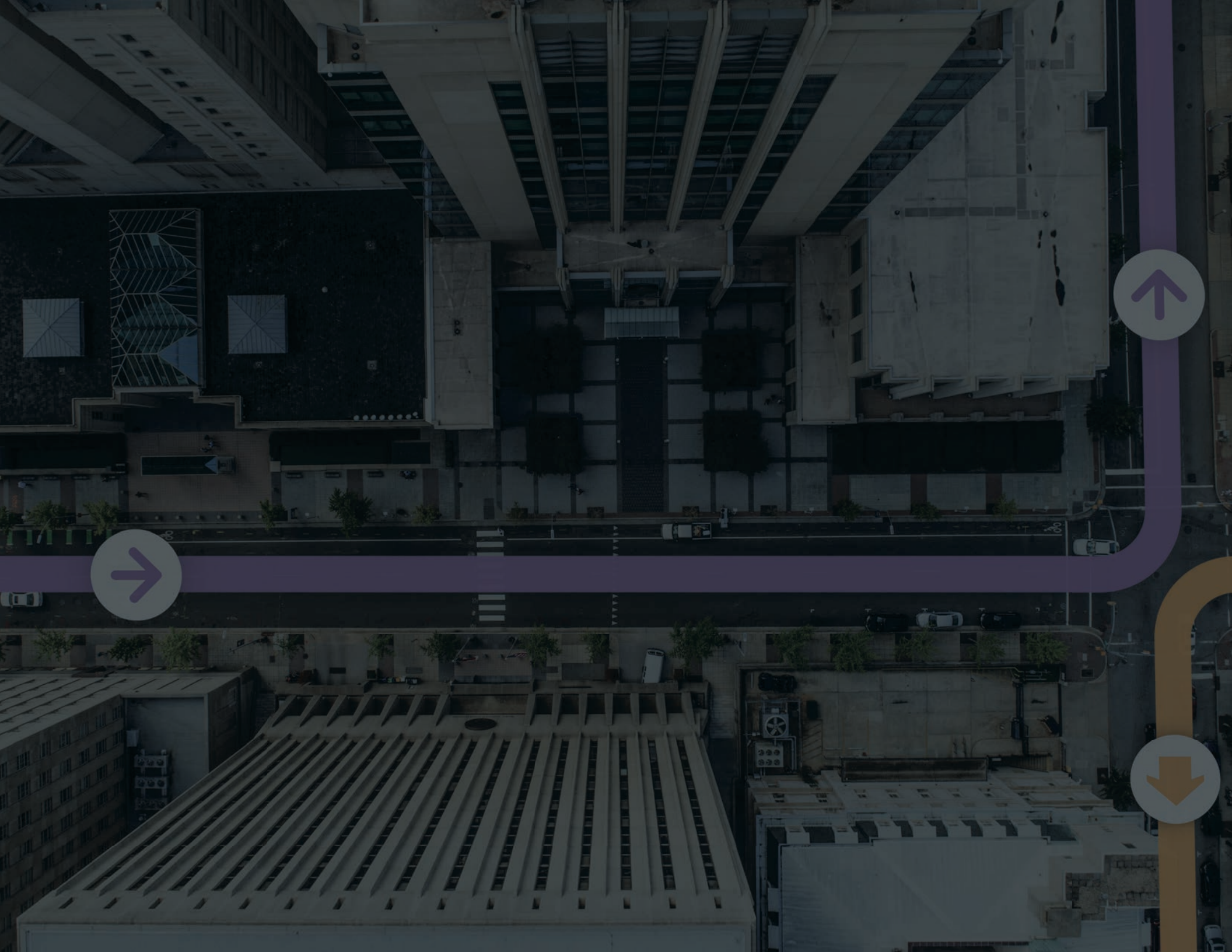


High-Velocity Field Sales with Multifactor Route Optimization

A Fresh Approach to Managing and Measuring
Sales with Visit Frequency Agreements (VFA)



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This ebook is a good use of your time if:

- 1 Your field reps are missing opportunities or only visiting their “regulars”.
- 2 Your sales plan looks great on paper, but doesn’t track action or measurement of sales outputs.
- 3 You’re not sure whether your reps have too many accounts, or too few.
- 4 You need to make your CFO love you by reducing mileage reimbursement, fuel and maintenance costs.

Introduction

Let's face it. Managing a field sales team that visits customers at appropriate intervals, doesn't cost too much, and actually meets revenue and customer satisfaction goals is high art! Intelligent routing and scheduling, integrated with CRM can help. These solutions must be as real-time, responsive, and as focused on revenue as your reps must be. They must enable reps to maximize time with the right customers and prospects while minimizing travel or idle time and reducing mileage and fuel expense. Finally, they must enable the right sales activity and create accountability.

We need a new way to manage and measure field sales activity. Old-style key performance indicators (KPIs), often built only on customer visits and service level agreements, fall short. The most effective sales organizations are using Visit Frequency Agreements (VFA) to plan and track sales activities. This new KPI is informed by customer data and multifactor routing and scheduling solutions that are integrated with CRM.

This guide to multifactor schedule and route optimization explores how to build optimal territories, prioritize sales activities, build complex schedules and routes based on performance goals and customer priority, and unlock savings while generating revenue. You'll learn:

- 1 How multifactor routing and scheduling can unlock revenue.
- 2 How to build customer-centric territories that maximize sales rather than those based on spatial or geographic factors.
- 3 How sophisticated, real-time routes and schedules maximize face-to-face visits with the right customers and reduce wasted time and expenses.
- 4 How to add accountability and predictability to field sales activities through Visit Frequency Agreements (VFA).
- 5 How to minimize the impact of real-time schedule changes and constraints.
- 6 How to reduce field sales expense including mileage, fuel, and maintenance costs.
- 7 How to select a route and schedule optimization solution for your high-velocity sales team.

“

“Research shows that field reps can increase stops by as much as 17% by leveraging route optimization, therefore increasing productivity and revenue while reducing costs.”

*-Texas A&M
Transportation Institute*

Multifactor Routing and Scheduling Defined

Building a Data-Driven Schedule and Route Plan

Multifactor routing and scheduling considers real-time data from CRM, historic traffic patterns, customer- or business-defined goals or objectives, and sales priorities to build an optimal, multi-day schedule and route plan. It is most effective for field sales and service organizations who manage large or congested sales territories. It uses a map-based mobile interface that is completely integrated with CRM, such as Salesforce®, and provides all the information reps need on-the-go.

Multifactor scheduling and routing can increase face-to-face selling time by as much as 20%. Built on real-time data, it reduces wasted time and expense due to traffic, weather, dead-time, cancelled meetings, or inefficient routes. Constraint-based routing and scheduling helps field sales and service leaders:

- Define and manage productive sales territories based on customer value and potential.
- Plan efficient sales routes and schedules that are actually followed by field reps.
- Deal with real-time changes and schedule constraints.
- Reduce mileage, fuel and maintenance expense.

“MapAnything is a great tool for our sales team to go out and interact with prospects. We have a plan of attack to prospecting now as opposed to just driving around like we were doing before. This will save our team a week a month in cold-calling and prospecting. Being able to plug all of our data directly into Salesforce®, and having all of the data match up perfectly, is key to our success with this product. This is entirely better than what we were doing before!”

-Paul Williams, Marketing Manager, U.S. Oil, a division of U.S. Ventures

How Many Reps and Where Should They Be?

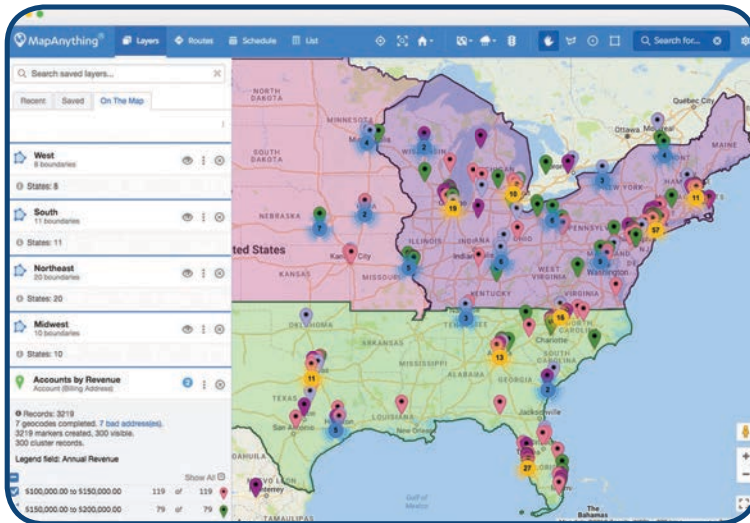
Building a Data-Driven Schedule and Route Plan

Every field sales leader asks: “How many reps do I need, and where should I put them?” Defining territories and optimizing for productivity is an ongoing challenge as products, sales goals, and accounts change. Once a territory is defined, sales leaders must find a way to ensure that it is covered effectively. They need a way to ensure that reps don’t just “cherry pick” the best customers or the accounts that are most convenient to visit—leaving valuable accounts and prospects untouched.

Today’s high-velocity sales organizations are using data-driven territory design technology with map-based data visualization, multi-objective routing technology, and real-time schedule optimization capabilities. This enables productive territory and sales planning, route optimization and schedule management, and field-level sales execution and accountability.

Harvard Business Review research shows that optimizing territory design can increase sales by 2 to 7%, without any change in total resources or sales strategy.

- HBR, Why Sales Teams Should Reexamine Territory Design



Designed for the Field Sales Manager, and the CFO, MapAnything optimizes performance and maximizes revenue with balanced territories based on opportunity size, customer or account priority, optimal routes and cost efficiency.

MapAnything territory design balances sales potential, workload, and routes among each territory, creating maximum sales potential, territory equity, and focus for reps.

Balanced territories enable sales leaders to create and manage Visit Frequency Agreements (VFA) with reps to ensure that all customers and prospects are touched at the right interval, and with the right level of focus, to maximize results.

Planning Routes and Schedules Manually Stinks!

Efficient Scheduling and Routing that Actually Gets Used in the Field

Field teams often have daily, weekly, or even monthly schedules to meet customer service agreements and to keep up with sales objectives. Many have large territories with a large volume of geographically distributed customers. Using siloed tools or tackling schedules and routes manually is inefficient and often results in plans that aren't followed because they're derailed by real-world constraints like weather, traffic, or standing meetings.

Multifactor route optimization offers the ability to build multi-day schedules with built-in visit frequency, consideration for fixed schedules or customer requirements, historic traffic patterns, and sales goals. It also uses CRM data to prioritize customer visits based on value, and adjusts real-time as conditions change.

Map-based route and schedule optimization software increases face-to-face selling time by as much as 20%, reduces wasted time and expense due to traffic, weather, dead-time, cancelled meetings or inefficient routes.

- MapAnything Research

**Increase face-to-face
selling time by**

20%

MapAnything Guide



MapAnything Guide

MapAnything Guide calculates optimal schedules and routes considering all factors that affect revenue and efficiency. Its powerful route optimization engine adjusts schedules and routes dynamically, or as meetings are cancelled or moved. Guide ensures that field sales leaders are always addressing the most valuable customers and prospects in the most efficient way possible.



Multifactor Routing & Scheduling

Gives field managers the ability to manage complex objectives and optimize routes by customer priority or score, urgency, visit sequence, time windows, travel time, match attributes, or other constraints.



A 90-Day Success Plan

Gives field managers and field reps the ability to build a plan for up to 90 days at a time. Reps look at their calendar to see a recommended plan of sales calls. All they need to do is execute.



Integration with MapAnything Schedule and Salesforce® Calendar

Considers Salesforce® calendar appointments in scheduling and routing avoiding schedule conflict.



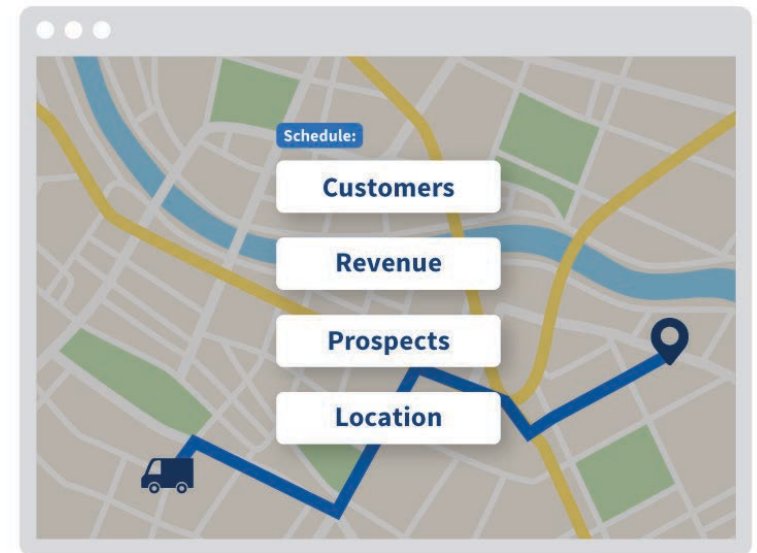
Intelligent routing based on customer value, score, or custom factors

Prioritizes high-value customer or prospect meetings first to optimize for revenue, not just time. Custom constraints can also be considered such as visit frequency agreements, service agreements, marketing campaigns or specialized customer or prospect scores.



Natively built on and Integrated with Salesforce®

One system of record with automatic updates to Salesforce® minimizes data input, increases adoption and reduces time spent on CRM.



It's a Real-Time World

Dealing with Issues Like Cancellations, Meetings that Run Long, Traffic, Weather, Sick Time.

Even the most experienced planners can't accommodate real-time issues that come up daily. Unforeseen changes frustrate customers, cause inefficiency, cost money in fuel and time, and hurt revenue. **Real-time route or schedule changes are not a matter of *if* but rather *when*.**

When a plan is interrupted, reps are forced to make in-the-moment decisions that could hurt overall productivity and undermine sales goals. For this reason, modern routing and optimization must be continuously monitored, updated, and adjusted. And, real-time schedule and route changes must seamlessly appear in both the map-based mobile interface and in Salesforce®.

MapAnything Guide manages changes dynamically and reveals an adjusted schedule and route plan through the map-based interface. Mobile sales teams don't lose time manually adjusting routes or schedules and are able to meet expectations without interruption. Missed or rescheduled meetings or appointments are automatically re-inserted into the schedule at an appropriate time.

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“MapAnything enabled us to track time spent travelling from case to case as our service engineers checked in and out of their respective stores. Using the Routes tool, we maximized our engineers' time on the road, leading to improvements in fuel consumption and better time management.”

- Paul Carass, Salesforce®
Administrator, Essence Coffee

A photograph of a Valvoline building and a large 3D sign. The building in the background has a long, low profile with a series of windows and the Valvoline logo on the roof. In the foreground, a large 3D sign features the Valvoline logo (a stylized 'V' with red, blue, and purple sections) and the address '100 Valvoline Way'. The scene is set outdoors with trees and a grassy area.

Case Study: Valvoline

100 Valvoline Way

Case Study: Driving Sales

Multifactor Routing and Scheduling Drives High-Velocity Sales for Valvoline: CPG Leader Achieves 60% Improvement in Sales



For more than 150 years Valvoline™ has been on the leading edge of motor oil technology and is a worldwide producer and distributor of premium branded automotive, commercial and industrial lubricants, and automotive chemicals. Valvoline ranks as the #2 quick-lube chain by number of stores and #3 passenger car motor oil brand in the DIY market by volume in the United States. Valvoline operates close to 1,100 different stores across the United States, with a sales team upwards of 40 individuals in differing territories.

Valvoline's Sales Team needed Sell New Accounts and Expand the Product Line Within Existing Customers

Valvoline needed to gain more visibility to grow revenue while balancing territories, selling to new accounts, and maintaining a positive customer experience for existing customers. After training and implementation, Valvoline hit the ground running and increased their overall Salesforce® adoption through visualization of their territories and customer data.

Prospecting and Lead Generation

- Prequalify before going into the marketplace for increased effectiveness.
- Generate more leads and find nearby prospects with proximity circles.
- Automate entry tasks using Click2Create to input a new lead in seconds.



“With MapAnything I can plot every opportunity or account I want. And then I can say ‘Ok, based on the number of opportunities and the number of accounts in a given zone, how many sales people will it take to effectively cover that? Our territories are getting optimized simply because of our visibility into what’s there is increasing. It’s made us much more efficient.”

**- Les Reed,
Director of Quick Lube Sales**

Case Study: Driving Sales (continued)

Multifactor Routing and Scheduling Drives High-Velocity Sales for Valvoline: CPG Leader Achieves 60% Improvement in Sales

Existing Account Management

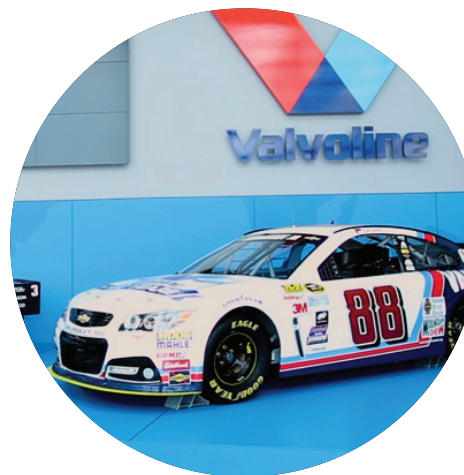
- Maintain a 360 degree view of their customers to upsell and introduce new products.
- Fill schedule gaps due to prospect cancellations to create a better customer service for Valvoline partners.
- Optimize pre-planned schedules to hit as many existing customer accounts as efficiently as possible.

Understand Competitive Landscape

- Find where competitor stores are located, who owns them, and how they relate to geographically to Valvoline's stores.
- See more customers to ensure they presenting and selling their products effectively in certain zones.
- Target undersaturated territories with high volumes of competitors to increase brand awareness and promotion.
- Results

After implementing MapAnything, Valvoline has:

- Seen a 60% improvement in sales effectiveness
- Increased their daily call volume from 10 to 12
- Maintains a 98% license adoption rate



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“When you put something on a map, and have colors or logos, it’s much more impressive and it’s much easier when you’re trying to build a story and talk to customers. It’s amazing when you start [visualizing data] because you can show things and help your reps become more profitable by seeing more accounts. That’s what set MapAnything different from the other tools that might be out there.”

- Mike Murphy,
Manager of Process Improvement

Multifactor Route Optimization Checklist

When selecting a routing and optimization solution, it's important to start with your overall business objectives and consider the complexity of your field sales and service environment. Key considerations include:

- ✓ Does the solution consider sales objectives and customer size and value to enable balanced territory design?
- ✓ Is the solution capable for optimizing routes and schedules based on multiple factors or constraints such as customer value, traffic patterns, weather, fixed meeting times or pre-scheduled obligations?
- ✓ Does the solution support continuous routes and schedules that span multiple days and locations?
- ✓ Is the solution integrated with Salesforce®, and able to utilize customer data to prioritize sales visits by customer or prospect value, as well as optimal location?
- ✓ Is the solution dynamic and able to adjust routes and schedules when things change?
- ✓ Can reps visualize routes and schedules on a map-based interface on their mobile device?
- ✓ Does the solution provide a single system of record that creates accountability among field sales reps with automatic updates to Salesforce® as meetings are conducted?

Conclusion

MapAnything, the Leader in Location of Things (LoT) technology solutions, purpose-built MapAnything Guide to meet the most challenging routing and scheduling environments for field sales and service organizations.

By implementing MapAnything Guide, field reps can more easily and efficiently meet KPIs, SLAs, VFAs, and other stated business goals, while giving field sales and service organization leaders a platform on which to ensure they have the correct coverage to see accounts at all times.

With MapAnything Guide, field sales and service leaders are able to:

- ① Define and manage optimal sales territories based on coverage requirements to meet revenue goals.
- ② Plan efficient sales routes and schedules based on customer value and potential that field reps actually follow.
- ③ Confidently build route and schedule plans that accommodate real-time changes and schedule constraints.
- ④ Significantly reduce planning efforts and the time required to do so, while enabling efficient and effective long-term planning to meet future business goals.

To learn more, visit www.mapanything.com/products/guide

About MapAnything

Location has changed the way we live, it's time to change the way we work. With the Location of Things Platform, connected employees navigate their way to higher productivity and moving customer experiences. Envision a better world of work, with MapAnything.

Founded in 2009, MapAnything's Location of Things (LoT) Platform helps clients answer the hard questions that impede field-worker productivity: How many people do we need, where should we place our resources, how are we doing against our goals, and how do we improve over time?

With more than 75,000 users, ranging in all sizes and industries from small businesses to international enterprises, MapAnything powers field teams around the globe to make better, data-driven decisions from a map-based interface.

The company is the recipient of Ventana Research's 2016 Technology Innovation Award for Location Analytics, has been named a Customer's Choice – Highly Reviewed App by users of Salesforce®, and was named a 2018 Cool Vendor in CRM Customer Service and Support by Gartner. In addition, MapAnything has received the 2017 IDC Innovator Award, been a member of the 2017 Entrepreneur 360 List, and been named a G2Crowd Highly Rated App.



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