

IMPROVE FIELD SALES RESULTS WITH ROUTE OPTIMIZATION

A FRESH APPROACH TO MANAGING AND MEASURING
SALES WITH VISIT FREQUENCY AGREEMENTS (VFA)





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

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 challenging. Location-intelligent routing and scheduling, integrated with CRM can help.

Location-intelligent routes and schedules must be as real-time, responsive, and 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.

This guide to multi-objective 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 multi-objective 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 Service Level Agreements (SLAs).
- 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*

Multi-objective Routing and Scheduling Defined

Building a Data-Driven Schedule and Route Plan

Multi-objective routing and scheduling considers real-time data from Salesforce®, 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 which provides all the information reps need on-the-go.

Multi-objective scheduling and routing, through Salesforce Maps Advanced, 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.

“This 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?

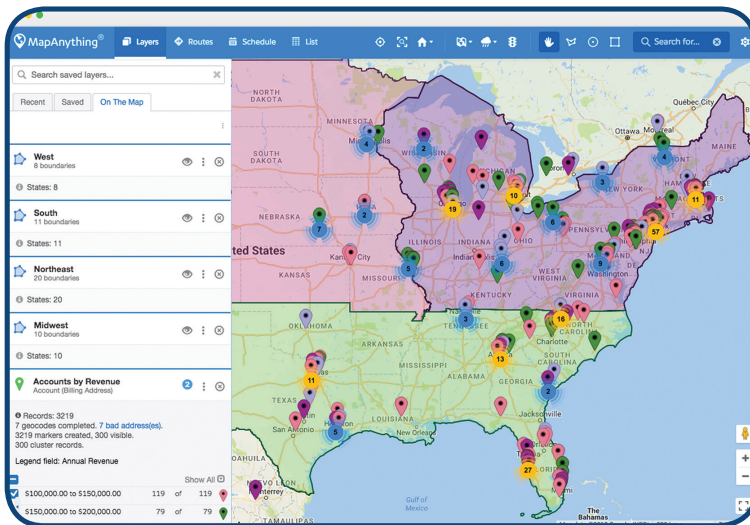
Building a Data-Driven Schedule and Route Plan

Every field sales leader asks: “How many reps do I need, and where should I put them?” Once a territory is defined, sales leaders must find a way to ensure that it is covered effectively, but optimizing routes for territory success is an ongoing challenge as products, sales goals, and accounts change. 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 map-based data visualization for productive territory and sales planning, route optimization and schedule management, and field-level sales execution and accountability. Data-driven territory design technology, like Territory Planner, in conjunction with multi-objective routing technology and real-time schedule optimization capabilities, like Salesforce Maps Advanced, ensures the plan is not only set, but worked in the field.

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 field teams with large territories, Territory Planner optimizes performance and maximizes revenue with territories based on opportunity size, customer or account priority, optimal routes and cost efficiency to maximize sales potential, territory equity, and focus for reps.

Balanced territories enable sales leaders to create and manage visit requirements 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.

Multi-objective 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.

- Salesforce Maps Research



Salesforce Maps Advanced



What is Salesforce Maps Advanced?

Salesforce Maps Advanced includes the Location Intelligence value brought through Salesforce Maps with the addition of powerful constraint-based route optimization technology, thematic mapping, and the ability to visualize any self-hosted data.

Built for fast-moving industries, such as Consumer Goods, Transportation, Service Providers, Salesforce Maps Advanced allows sales managers to build optimized plans for their field reps to follow to ensure all goals are met through:

Continuous Route Optimization

Empower field teams with large geographic territories that may require overnight trips with routes starting and ending at different locations each day.

Complex Configuration

Configure complex business constraints and reinsert missed or cancelled appointments to be optimized at a later date.

Constraint-based Routing

Solve traveling salesperson problems (TSPs) and last-mile delivery obstacles with constraint-based routing. Consider multi-objective business needs, like time windows or distance limits, to build the most optimal route and schedule for complex field teams.

Planned vs Actual Performance Reporting

Gain better visibility into rep performance with planned vs actual reports and custom configurations. Compare mileage planned vs driven for accurate budgeting; stops planned vs made to drive rep productivity; time spent prospecting vs visiting existing customers to drive accountability; and more.

Thematic Mapping

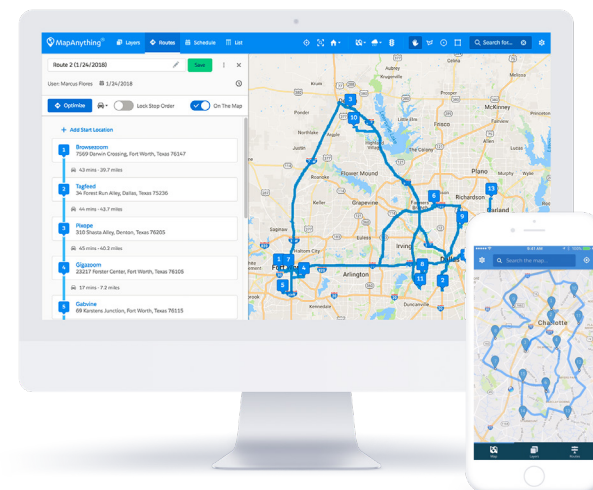
Utilize Thematic Mapping to quickly identify themes or trends in data and make large data sets understandable and actionable.

Self-hosted Data Visualization

Import and visualize self-hosted data to the map layers to engage in true large-scale geo-analysis across a virtually unlimited amount of data.

Sales & Marketing Alignment

Align field sales and marketing efforts by utilizing start and end dates on campaign objects to ensure visits coincide to when a marketing blitz is occurring in a certain territory.





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®.

Salesforce Maps Advanced 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.

“

“We can now 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 office building and a large outdoor sign. The building is a modern, multi-story structure with a glass facade and the Valvoline logo on the roof. The sign is a large, grey, three-dimensional structure with the Valvoline logo on top and the address "100 Valvoline Way" on the bottom. The background shows a grassy area with some trees and a clear sky.

Case Study: Valvoline

100 Valvoline Way

Case Study: Driving Sales

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



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

Valvoline operates close to 1,100 different stores across the United States, with a sales team upwards of 40 individuals in differing territories. 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

Valvoline is able to prequalify prospects before going into each market to increase effectiveness while in the field. With premium data, they can generate more leads and fill any schedule gaps while in each market, and create new leads in seconds with Click2Create.



Case Study: Driving Sales (continued)

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

Existing Account Management

The field teams at Valvoline are able to utilize thematic mapping to visualize customer trends and introduce new products. Schedule and route optimization allows field reps to hit as many existing customer accounts as efficiently as possible, and fill schedule gaps with any nearby prospects.

Understand Competitive Landscape

Sales leaders can now more easily locate competitor stores, who owns them, and how they relate geographically to Valvoline stores and partners. With this information at hand, leaders can target undersaturated territories with high volumes of competitors to increase brand awareness and promotion.

Results



“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 this different from the other tools that might be out there.”

- Mike Murphy,
Manager of Process Improvement

Multi-objective 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 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

Salesforce Maps allows users to optimize performance at every level of the sales process - from Territory Design and Planning, to Field Execution and Visualization of results.

By enabling users to create optimal schedules and map optimal routes through Salesforce Maps Advanced, companies can maximize resources, drive productivity and revenue, and increase territory control and visibility, all while reducing expenses.

By implementing Salesforce Maps Advanced, field reps can more easily and efficiently meet 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 Salesforce Maps Advanced, field 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.

About Salesforce Maps

Salesforce Maps, allows users to optimize performance at every level of the sales process - from Territory Design and Planning, to Field Execution and Visualization of results.

Salesforce Maps, enables customers to design optimal territories, create optimal schedules, map optimal routes, and view real time or historic location of assets, equipment, or vehicles. This helps companies to maximize resources, drive productivity and revenue, and increase territory control and visibility, all while reducing expenses.



results@mapanything.com | www.mapanything.com

© 2019 MapAnything. All Rights Reserved.

