Territory Management implemented for a Medical Device company

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Salesforce Practice

Who Are We?

SP Tech is a Salesforce success partner, helping businesses across the globe-to Develop, Sustain, and Manage the digital ecosystem for years now.

We were established in 2015, currently working across the USA & India. Our major expertise and 20 years of combined knowledge can promise you robust solutions across the healthcare and financial domain.

Our experts focus on your problem areas to figure out solutions, which can leverage the best of the Salesforce Cloud Computing platform. In turn helping you get more Sales, drive better revenues, and focus on exponential business growth.

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Project Description

SP Tech implemented Territory Management solution in Salesforce Sales Cloud for a Medical Device Company, enabling them to efficiently monitor their sales teams in different regions for better revenue generation.

Industry
Healthcare Services

Products
Salesforce Sales Cloud

About Our Client

The Client is a medical technology Organization based out of Minneapolis. They aim at bringing disruptive innovation to minimally invasive surgical devices. They work towards better engineering designs and smart manufacturing to deliver breakthrough technologies to medical world.

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Challenges

➤ Sales Team management

The client wanted a mechanism for efficient monitoring of their sales teams in different regions for better revenue generation.

The client also looks forward to achieving these points:

➤ See territory setup/teams across different regions.
➤ Visibility into sales team of every region.
➤ Automatically assign clients/contacts/opportunities to region.
➤ Group territories according to a common denominator.

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Solutions

➢ Salesforce Territory Management is the holistic solution to achieve all the above challenges. We studied the client's geographic presence and analyzed their team structure to set up territories.

➢ The territory model provides a very clear tree like structure to show all the territories. One can use + option to expand the region to see further divisions (if any).

➢ Just by clicking on any of the territories in the territory model, one can see all the details of that territory. It shows the list of users assigned to that territory. One can add/remove users from the list as needed.

➢ Most of the times there are criteria to define under which territory should the account/contact/opportunity fall. Using the assignment rules one can easily setup predefined rules to assign territories automatically.

➢ Territory type helps group territories according to a common denominator such as core reps versus overlay or named accounts versus geographic territories. Every territory created has a territory type. One can use territory types only to organize & create territories. They don't appear on territory model hierarchies.

Results

➢ **Analyzing Sales Territories**

Analyzing Sales territories as to how they are individually and collectively performing, and how they get distributed, became easier.

➢ **Increasing Sales and Reducing Cost**

Increased Sales and Reduced Cost with Enhanced Coverage and Aligned Territories.

➢ **Increased Productivity**

Increased Productivity and Customer Satisfaction.

➢ **Quick and Accurate**

Quick and Accurate Measurement of performance through Analytics and Reporting.

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