

With Geopointe, Benefit Bank Distributors Eliminated Hours of Manual Territory Planning.



With Geopointe, our reps save 20 hours a week on territory planning — it's completely changed how we operate in the field.

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The Challenge:

- The company managed thousands of advisors' territory plans manually, relying on spreadsheets and guesswork.
- Reps spent hours identifying prospects without geographic visibility or easy mobile access to relevant data.
- There was no streamlined way to visualize advisor activities or territory coverage for leadership.
- Executives needed quick, impactful visuals to understand team coverage and opportunities.

Why Geopointe?

- **All-in-One Salesforce Integration:** Geopointe seamlessly integrates with Salesforce, streamlining prospecting, routing, and reporting for the sales team and executives.
- **Ease of Use and Setup:** Fast implementation and a user-friendly interface drove adoption across desktop and mobile users, streamlining trip planning and execution.
- **Time-Saving Automation:** Routing, assignment plans, and thematic maps replaced manual work, enabling smarter workflows.
- **Exceptional Support:** Geopointe's responsive support made troubleshooting and advanced use cases simple.

The Results

- ✓ **Massive Time Savings:** Top users save up to 20 hours each week, focusing on high-value meetings.
- ✓ **Better Prospect Targeting:** Reps find untouched advisors and schedule smarter meetings with geographic insights.
- ✓ **Executive Visibility:** Leadership gains clearer insights with tools like shapes and thematic maps for faster decision making.
- ✓ **Enhanced Sales Strategy:** Assignment plans, routing, and mobile access keep reps flexible and productive.
- ✓ **Operational Growth:** Geopointe scales with the organization, supporting territory changes and expansion.