

FloQast transforms territory planning with Geopointe, saving hours each week.



Geopointe's automation has saved us weeks—if not months—of manual work on territory planning and adjustments.

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The Challenge:

- FloQast's territory planning relied on manual Excel sheets, creating time-intensive work.
- Each territory update required batch processing by their business systems team, causing delays.
- The team's unique structure called for granular segmentation of territories by geography and account size.
- Without a visualization tool, it was difficult to interpret account distribution accurately.
- Managing around 50 territories across departments highlighted the need for a scalable solution.

Why Geopointe?

- **Native Salesforce Integration:** Geopointe, as a native Salesforce app, connected seamlessly with FloQast's Salesforce instance, consolidating data and creating a unified workflow.
- **Flexible and Customizable Territory Assignments:** With diverse assignment plan options, FloQast can set territory rules by city, zip code, and alphabetical splits, meeting unique needs, while Apex code capabilities allow for tailored automation, eliminating manual, after-hours processing.
- **Real-Time Territory Updates:** Geopointe's Assignment Areas feature enabled instant updates, allowing FloQast's Revenue Operations team to adjust territories as business needs evolved, supporting agile growth.
- **Data Visualization for Strategic Planning:** Geopointe's export and visualization tools provides their leadership with clear insights into territory performance, facilitating data-driven decision-making and strategic planning.

The Results

- ✓ FloQast saved significant time by automating account assignments and **reducing weeks of manual territory planning.**
- ✓ **Enabled quick territory updates with minimal clicks,** supporting fast responses to Internal changes.
- ✓ Delivered enhanced market insights, **helping FloQast visualize whitespace and prioritize growth areas.**
- ✓ Reduced errors with automated processes **ensuring consistent and accurate territory assignments.**
- ✓ Allowed the Customer Success team to create **territory assignments based on criteria beyond geographical boundaries.**
- ✓ Empowered leadership with **data-driven insights through visualizations,** supporting strategic territory planning.