

Howard Capital Management Enhances Territory Planning with Geopointe's Mapping Solution



Our team is in Geopointe every day. It's easy for them to use, they're comfortable, and it just makes their jobs easier.

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Howard Capital Management

The Challenge:

- The internal sales team supporting ten external wholesalers struggled with managing large, multi-state territories effectively.
- Missed appointments and inefficiencies were common due to limited visibility into travel distances and advisor locations.
- Reliance on spreadsheets and basic Salesforce functionality lacked the flexibility and insights needed for efficient territory planning.

Why Geopointe?

- **Seamless Salesforce Integration:** As a native Salesforce application, Geopointe easily integrated with Howard Capital Management's CRM, creating a unified and efficient workflow.
- **Dynamic Territory Planning:** Geopointe allowed the internal sales team to map advisor locations and align travel plans, ensuring wholesalers could maximize meeting opportunities within their territories.
- **Enhanced Collaboration:** Internal sales representatives created shared zones and data sets, enabling external wholesalers to view mapped-out advisors and streamline their outreach.
- **Unmatched Support:** Howard Capital Management praised Geopointe's support resources, from a user-friendly help site to responsive customer support, making implementation and ongoing use seamless.

The Results

- ✓ Geopointe **improved territory alignment**, providing clear visibility into advisor opportunities.
- ✓ **Missed meetings were reduced** by optimizing travel routes and identifying nearby prospects.
- ✓ **Advisor outreach increased** by targeting untapped contacts and adding them to call lists.
- ✓ Sales teams streamlined planning, **ensuring effective territory management across the U.S. and Puerto Rico.**
- ✓ New hires quickly adopted Geopointe, **making onboarding simple and efficient.**