

Trader Interactive Drives Increase in Efficiency with Geopointe.



What I've learned from Geopointe about territory building in the last few months has been immeasurable in terms of how I can pinpoint my accounts, how I can define my territories, and how I can qualify that information.

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The Challenge:

- Mileage tracking: the organization required a solution for tracking mileage to and from account visits for proper expensing and reimbursement.
- Route planning: Individual employees were using various map tools, so the organization wanted to find a tool they could roll out to the entire company.
- Activity management: sales team members are held accountable for creating and logging a certain amount of activities (such as planned or impromptu meetings), but the logging process was manual and inefficient. They couldn't log the activity in the moment, but had to remember and add extra time to their day inputting meeting notes hours after their work days were finished.
- Territory mapping: territories were not solidly defined for a portion of their business.

Why Geopointe?

- Route-planning and map functionality: originally, the organization just wanted a general mapping tool for reps across the company to use, but they found Geopointe offered additional benefits beyond mapping.
- Dual-purpose: When positioned and implemented appropriately, Geopointe offers the ability to capture and validate mileage with its route planning as well as check-in and log activities while at a specific location. The ability to combine these two things – route management and activity tracking – was a driver for how they would use the tool.
- Ease-of-use: Geopointe's integrated check-in functionality is incredibly advantageous for logging their activities, delivering a seamless combination of activity tracking and route planning.

The Results

- ✓ Reinforced essential behaviors: Geopointe has helped create the needed behavior of activity management; the organization has experienced improved accuracy and tracking of activities now that it is easier and possible in the moment.
- ✓ Time-saving: now that these activities can be completed while on-site there is no more extra work for the field reps at the end of the day.
- ✓ Increased adoption: they are seeing more widespread adoption across the entire organization due to the ability to map and plan your days and be more strategic in how you travel between accounts.
- ✓ Enhanced visibility: they created a dashboard so users can track their mileage, activities and check-ins and managers can see what their team has done and when with time stamps, increasing visibility into the behavior of individual reps.
- ✓ Valuable insights: additionally, territories are now clearly defined with Geopointe's shape library, giving the company valuable data-informed insights that are much more transparent than what they had before.