

4 WAYS TO MAXIMIZE

FIELD TEAM PRODUCTIVITY WITH GEOLOCATION



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THE SALES INDUSTRY IS A COMPETITIVE AND QUICKLY EVOLVING SPACE.

Although the trend towards inside sales continues with the development of new technology, the need for field sales and service teams will always outweigh the recent shift. In fact, field sales are evolving with the introduction of Geolocation technology such as Geopointe. Such products provide a wealth of solutions and ways to complete tasks in a more strategic and effective manner.

Technology is turning the outside sales game on its head, and opening doors for organizations to create better processes, perform better, and have more selling success than ever before.

Managers are beginning to realize that sales performance is inhibited by many factors. From challenges such as creating the most optimized territories, to the lack of ability to visualize and time activity in the field, to lack of drive stemming from disconnect within the team, field teams have it hard.

SO WHAT HAPPENS WHEN YOU REMOVE THOSE CHALLENGES THAT REPS FACE ON A DAILY BASIS?

Reps are able to reach their full potential and ultimately reach team goals when a manager provides them with the tools to do so.

We're going to take you through some pivotal processes of a typical sales team so you can see exactly what problems arise and the solutions Geopointe provides to help their jobs run smoothly as well as how you can measure performance metrics to figure out what you can improve in your Geopointe-assisted processes.

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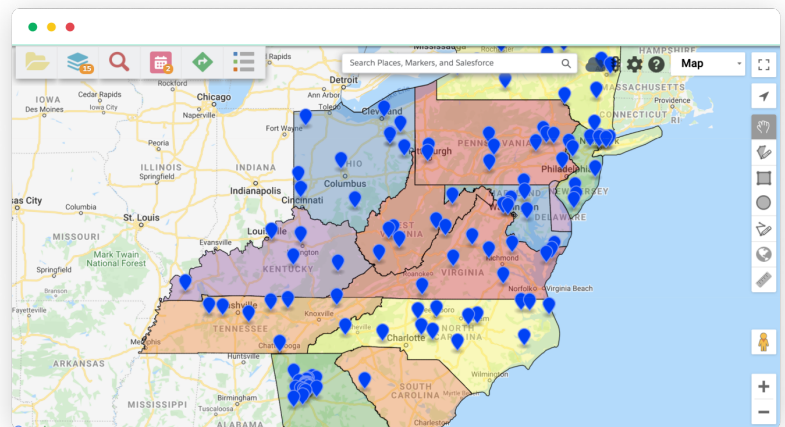
I. PLANNING AND OPTIMIZING TERRITORIES

CREATING TERRITORIES

The first challenge that managers face is creating territories for their reps. There are many factors that must be taken into account based on a company's goals. Ultimately, these territories must be optimized to ensure full geographical coverage, be allocated equitably and be in accordance with the rep's ability to maintain a certain number of relationships.

ASSIGNMENT PLANS

Geopointe's Assignment Plans allow managers to equalize territories by any type of Salesforce field or activity metrics, and even draw exact territory boundaries on the map, creating a precision that you could not achieve without a solution like Geopointe.



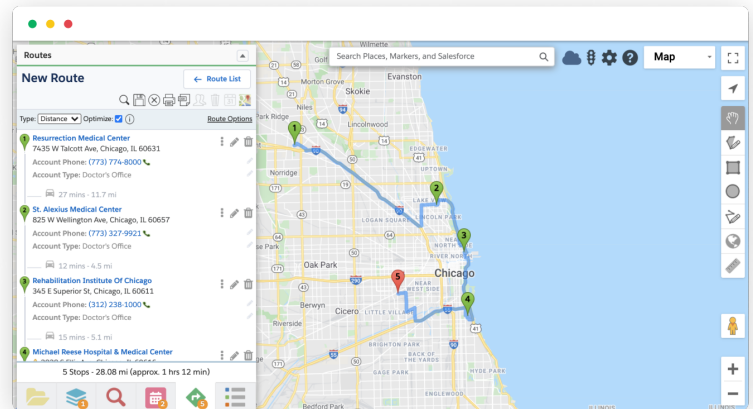
These assigned territories can be used for automated lead routing to further streamline sales processes and ensure timely lead response times. They also give reps an unmistakable view of their exact territory lines to search for prospects and accounts that are due for a visit.

II. PREPPING FOR TIME IN THE FIELD

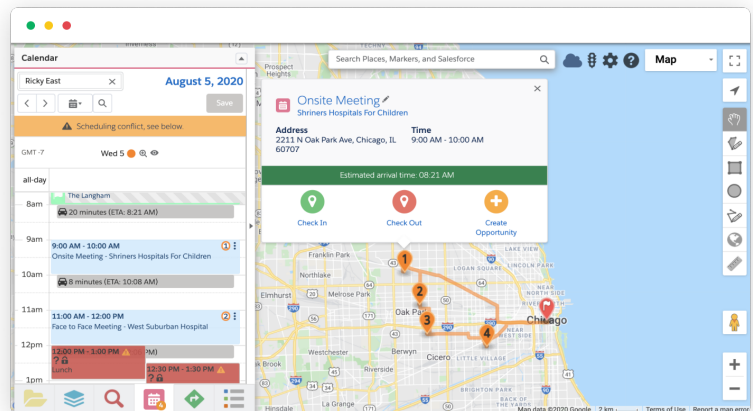
USE ROUTING AND SCHEDULING TO OPTIMIZE A REPS TIME

Once a rep confirms an appointment within their territory, they can use routing and optimization (fig. a) to create a more efficient route to the appointment and visit other high-priority accounts around the main appointment. Reps can then use the Calendar-Based Scheduling (fig. b) feature to schedule their separate appointments and driving time for the day as one combined route. Reps can schedule routes days, weeks or even months in advance, and create a cadence for account visits that will guarantee all clients are touched in an allotted time frame.

Account management and planning can be streamlined with Geopointe's features. With more efficiency comes increased activity, and managers are able to track key metrics such as confirmed appointments to make sure reps are reaching their goals. This gives managers the opportunity to coach reps before they fall too far behind.



(fig. a) Geopointe's route planner feature



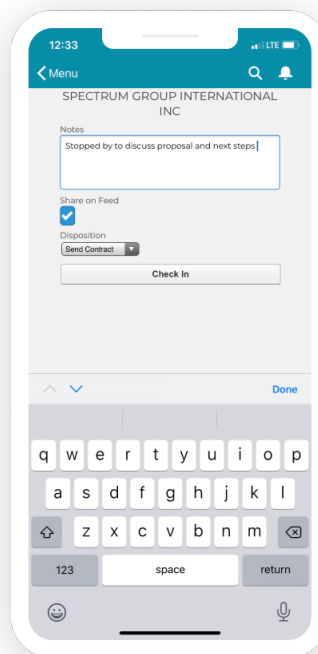
(fig. b) Geopointe's calendar-based scheduling feature

III. EXECUTING IN THE FIELD

When the rep begins to follow an optimized route on a navigation app of choice (such as Google Maps), they are able to take advantage of a number of other features to overcome the challenges of documenting time in the field.

CHECKING-IN

A rep can check-in and out of stops once an appointment has been reached, record meeting notes and enter information about the account directly into Salesforce. Then the rep has the ability to schedule a follow-up task through Geopointe with an “add activity” function, giving management visibility into more key metrics that signify if reps are on track to meet their goals. Each of these metrics can be viewed in a report on a map or on their Performance Scorecard, providing management with visibility into the important activities that signify whether a rep is on track to reach their goals in the field.



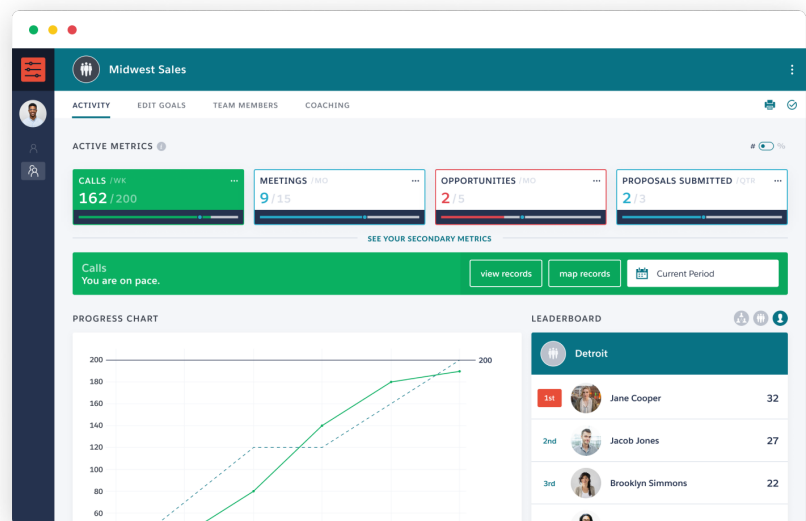
In addition, when a rep receives notice of a meeting cancellation (whether last minute or earlier on) they can simply search for accounts or contacts near the cancellation and add a new stop to the route in place of the cancelled time slot.

IV. TRACKING PERFORMANCE

USE PERFORMANCE SCORECARDS TO TRACK PROGRESS AND ENCOURAGE HEALTHY COMPETITION

As you may have noticed, performance tracking is an action that is enabled by each and every process that a sales team owns. Geopointe has a unique and effective way of displaying that information with Performance Scorecards. Performance Scorecard tracks rep and overall team key performance indicators that lead to results for visibility and accountability.

Stack rankings displayed on monitors and tv screens allow reps to compare their own activity completion against others in real-time, and allows managers to view rep rankings and course correct before reps fall behind. With reps owning their time in the field, visibility becomes even more important and Geopointe can help managers keep track of remote team activity.



Analyzing certain metrics and rep capabilities can also allow managers to optimize rep territories accordingly. For example, a manager can view the rep's touched/untouched accounts for the year on the map, and determine whether the territory is too large, the rep needs better strategy, or another factor. Territories and lead routing strategy can be affected by the data collected previously by the reps and analyzed with Geopointe.

IN CLOSING

Removing some of the barriers that field sales teams face every day can be enough to supercharge an organization's sales activity and results. Providing your reps with a robust tech stack to drive success will not only contribute to your organization, but will change the way your reps sell and develop their own careers.

Organizations are able to draw on Geopointe's features to make many aspects of field service and sales easier and more efficient, tracking performance along the way using key metrics in real-time.

ABOUT ASCENT CLOUD

We are a team of professionals who are passionate about helping sales and customer-facing teams improve each and every day. At Ascent Cloud, we leverage our industry-leading products to drive productivity with geolocation (Geopointe) and performance management (LevelEleven), and provide end-to-end solutions to our 1,800+ customers.

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