

Objective


You now have the ability to pull all of the essential pieces of a territory plan together in one place – using existing information that you already have in Salesforce.com. This way you can create and implement territory plans and strategies to win greater share of the potential business in your territory!

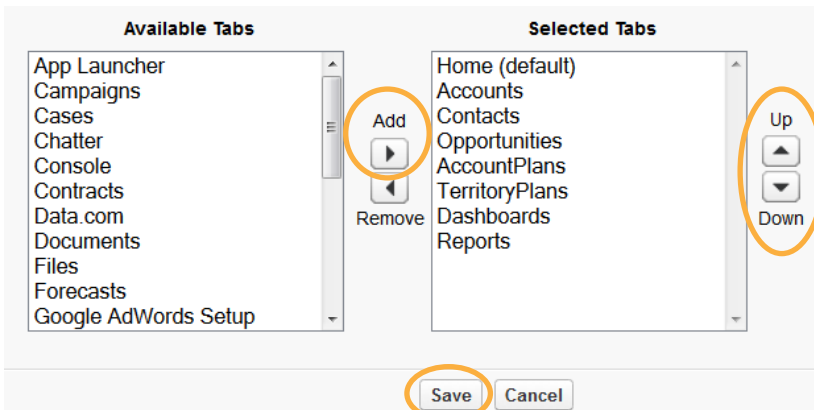
This is a step-by-step manual to help you get up-to-speed fast and begin benefiting from improved territory planning.

The TerritoryPlan Tab

One of your tabs should be setup to display: TerritoryPlans

Note: If you do not see this in your tab list, you can add the tab with these steps:

- 1) Click the “+” icon at the end of the tab list.
- 2) Click the “Customize my tabs” button on the  far right.
- 3) Locate the “TerritoryPlans” item in the Available Tabs box on the left
- 4) Click the “Add” > button
- 5) Position the item in the “Selected Tabs” list in the order preferred using the up/down buttons.
(optional)



- 6) Save changes

You will now see the tab at the top of your Salesforce screen.

Creating a Territory Plan

From the new TerritoryPlans tab, click the “New” button to create your plan.

The screenshot shows the Plan2Win software interface. At the top, there is a navigation bar with tabs for Opportunities, AccountPlans, TerritoryPlans (selected), Dashboards, and Reports. Below the navigation bar, the page title is 'TerritoryPlans Home'. There is a 'View: All' dropdown menu and a 'Go!' button. A 'Create New View' link is also present. The main content area is titled 'Recent TerritoryPlans' and features a 'New' button circled in red. Below this is a table with columns for TerritoryPlan Name, Created By, and Created Date. The table contains two entries: 'CA Territory Plan' and 'Healthcare Territory Plan', both created by 'Ron Snyder'.

TerritoryPlan Name	Created By	Created Date
CA Territory Plan	Ron Snyder, 4/16/2014 9:44 AM	4/16/2014
Healthcare Territory Plan	Ron Snyder, 4/15/2014 11:08 PM	4/15/2014

After clicking the “New” button, you will be brought to an edit screen where you can begin to fill in several details. Fill in as much as you can initially; you will be able to update the information again later by clicking “edit” in the top menu.

Plan Name

First, give your plan a name, like “FY2014 Territory Plan – your name or territory name”.

The screenshot shows the 'Information' section of the edit screen. It contains two input fields: 'TerritoryPlan Name' with the value 'CA Territory Plan' and 'Owner' with the value 'Ron Snyder'. A red vertical bar is visible to the left of the 'TerritoryPlan Name' input field, indicating a required field.

Corporate Plan/Quota

In this section, fill in the required fields (those with a red line to the left of the text fill in box). Your Territory Sales Goal should come from your assigned sales goal, comp plan. Adjust your close ratio to reflect your best estimate. 100% close ratio is the default.

The screenshot shows the 'Corporate Plan / Quota' section. It contains four input fields: 'Average opportunity size', 'Close ratio' (with a value of 100), 'Territory sales goal', and 'Additional sales from existing base'. Red vertical bars are visible to the left of the 'Average opportunity size' and 'Territory sales goal' input fields, indicating they are required.

Personal Plan/Quota

If you wish to track goals separate from your company goals, enter them in this section. (optional)

The screenshot shows the 'Personal Plan / Quota' section. It contains four input fields: 'Territory sales goal', 'Average opportunity size', and 'Additional sales from existing base'. Red vertical bars are visible to the left of the 'Territory sales goal' and 'Average opportunity size' input fields, indicating they are required.

Territory Overview

In this section, include any facts or strategies regarding your territory.

Territory Overview

Industry trends impacting your territory ☺

Key trends in your geography ☺

Behavior and Territory Goals

The plan allows you to track up to four key goals regarding your territory. Enter them here.

Behavior and Territory Goals

Territory Goal #1 ☺

Territory Goal #2

Territory Goal #3

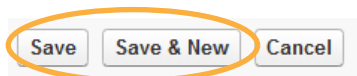
Territory Goal #4

Narrative

The narrative is a description of your territory. You can also include any additional issues or factors regarding your territory in this section.

Save

Once you have added your information, save your plan or click save and new to save and create a new plan.



Note to User

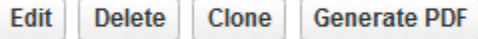
A few items to note:

- The “Sum of Closed Opportunities” and “Sum of Open Opportunities” simply sums of the values you have entered into the opportunity amount.
- “Close Ratio” (close rate) is the percentage of deals that go from opportunity to close.
- The information in your territory plan must be maintained on a regular basis in order to remain accurate and beneficial.

Buttons

These buttons, at the top and middle of the Territory Plan page, enable you to:

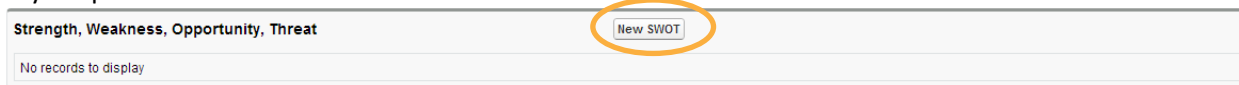
- Edit or Delete the plan
- Clone the top section of the plan
- Generate a pdf of the plan that can be saved or sent to an appropriate person



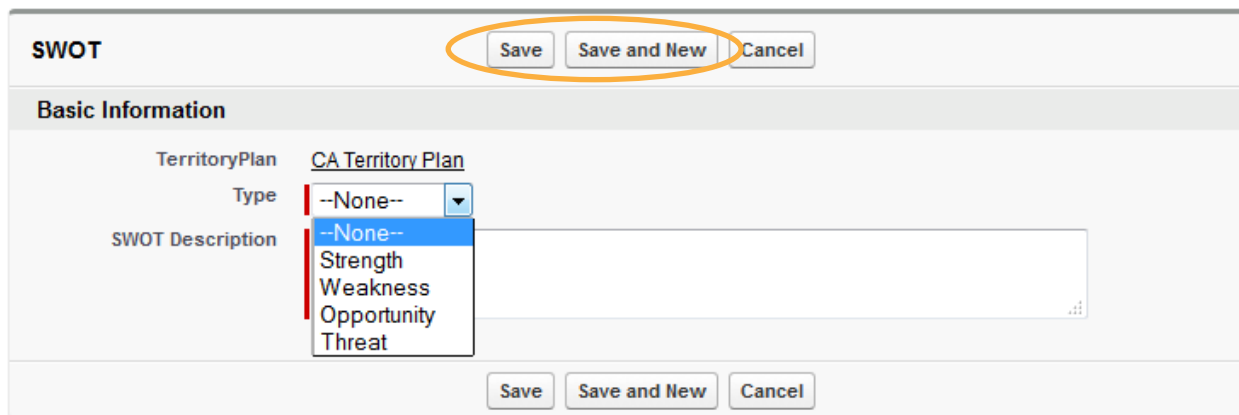
SWOT, Strategies, Activities

SWOT (Strength, Weakness, Opportunity, Threat)

Here you can track overall SWOT items for your territory. Click the “New SWOT” button create new items in your plan.

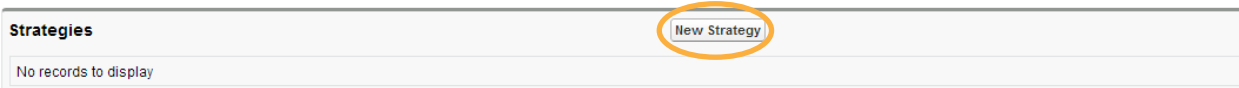


On the SWOT screen, select the correct type (Strength, Weakness, Opportunity, Threat) and then add your description. Save each item when finished. You can choose “save and new” to create a new SWOT.



Strategies

Here you can track overall territory strategies and tactics. Click the “New Strategy” button create new items in your plan.



On the Strategy item screen, enter your strategy name and then add the associated tactic. Save each item when finished and repeat as needed.

Strategy Save Save and New Cancel

Basic Information = Required Information

TerritoryPlan CA test

Strategy |

Tactic

Save Save and New Cancel

Activities

The Territory Plan allows you to track Tasks and Events attributed to your plan. These function just like the activities elsewhere in Salesforce.

Open Activities New Task New Event

No records to display

Target Accounts

On the territory plan screen, scroll down to the “Target Accounts” section. Click the “New Target Account” button to bring in one new account into the plan. Here you can review the list of accounts that you selected. This list allows you to see more detail about your accounts. If you selected any incorrectly, click the “Del” link to remove any that don’t belong. Then repeat the selection step above again until you have your complete list of target accounts.

Target Accounts New Target Account

Action	Account Name	Type	Account's compelling needs	Our differentiators	Our sales approach
Edit Del	Global Media	Prospect	Needs additional capabilities	faster more functionality more cost effective	work with our current contacts to win this opportunity

Updating Target Account Details

With your accounts selected, it is time to update the details. From the Target Account list, click the "Edit" link next to the account you wish to update.



Target Account Strategy

In this section, you will need to fill in several strategic fields regarding the account. Help tips are provided to guide your input.

Process Information	
Account's compelling needs	Needs additional capabilities
Account's strategic initiatives	Improve sales
Our product/ service	Our new product
Our differentiators	faster more functionality more cost effective
Our sales approach	work with our current contacts to win this opportunity

Target Account Partners

If you have a partner that you work with on the selected account, this section will show their information and partner strategy.

Partner Information	
Partner who can help	<input type="text"/> 
Partner relationship	--None-- 
Partner strategy	<input type="text"/>

Target Opportunities

Bringing in Your Target Opportunities

On the territory plan screen, scroll down to the “Target Opportunities” section.

Click the “New Target Opportunity” button to bring in one new account into the plan. Here you can review the list of opportunities that you selected. This list allows you to see more detail about your opportunities. If you selected any incorrectly, click the “Del” link to remove any that don’t belong. Then repeat the selection step above again until you have your complete list of target opportunities.

Target Opportunities							
Action	Opportunity Name	Type	Account Name	Amount	Stage	Probability (%)	Close Date
Edit Del	Acme - 200 Widgets	Existing Business	Acme	\$20,000.00	Closed Won	100	8/20/2014

Important Note:

Add opportunities into your plan as you create new opportunities to keep your plan up to date.

Updating Target Opportunity Details

With your opportunities selected, it is time to update the details. From the Target Opportunity list, click the "Edit" link next to the opportunity you wish to update (see above).

Target Opportunity Strategy

In this section, you will need to fill in several strategic fields regarding the opportunity. Help tips are provided to guide your input.

Process Information	
Account's compelling needs/ events ?	<input type="text"/>
Our product / service ?	<input type="text"/>
Account's decision criteria ?	<input type="text"/>
Our differentiators ?	<input type="text"/>
Account's decision process ?	<input type="text"/>
Account's funding/ budget process ?	<input type="text"/>
Our sales approach ?	<input type="text"/>

Important Note:

After you save the Opportunity Strategy for the first time, 2 additional sections will appear below (see next page).

When you edit your Opportunity Strategy, be sure to update and save your strategy information (above) before entering information in the screen section below... as indicated on the page:

Target Opportunity Details continued

Target Opportunity Contact Roles

This section will bring in Contact Roles from the Opportunity object and you can add new contact roles that will show up on this screen.

Click Save when done.

Contact Roles New
No records to display

Target Opportunity Partners

This section is the same on the Opportunity itself. Any changes here will reflect on your opportunity as well (and vice versa).

Click Save when done.

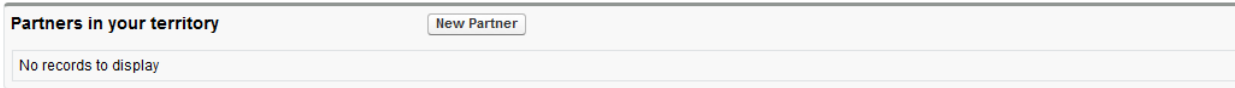
Partners New
No records to display

Other Features of the Territory Plan

From the main Territory Plan screen, there are a few other features.

Partners in your territory

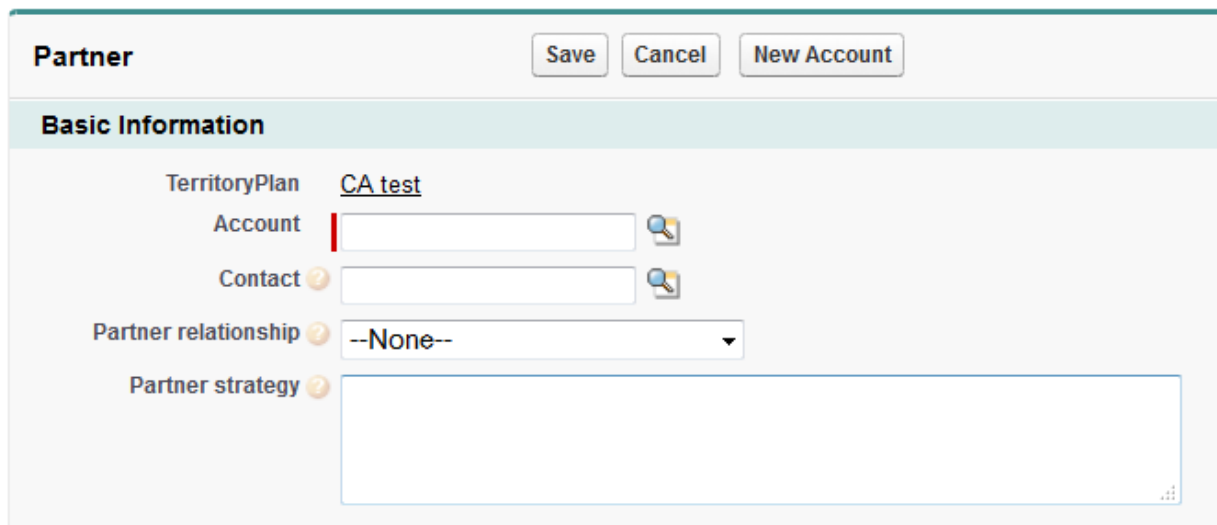
Similar to tracking partners on specific accounts and opportunities, you can also track partners more broadly as applied to your Territory. To add a new Partner to your plan, click the “New Partner” button in the Partners in your territory section.



Partner Information

Note: the partner must be an account in Salesforce. If the partner is already an account in Salesforce, select it in the Account field- you can use the look up. If it is not an account in Salesforce, you can click New Account and enter a new “partner” account.

You can also select your main contact at this partner. Identify your relationship, value, and strategy, and then save your changes. Save and repeat for all partners you wish to track. Click Save when done.



Activity History

A history of the activities that were registered in the plan will be saved in this section.

