

Overview

Territory Plan Pro for Salesforce.com is an integrated application that enables Territory Managers to create and execute Territory Plans to improve sales results.

It is designed to respond to the 7 requirements of an Effective Sales Planning app:

1. Enable creation of strategic plans – shifting from a tactical approach
2. Prioritize accounts and opportunities
3. Execute plans by having them in Salesforce.com
4. Provide visibility for Sales Management and Territory Managers via reports and dashboard
5. Straight-forward, easy to use and learn
6. Works with your sales approach
7. Good Value in dollars and training time

Key Features

Territory Plan Pro enables improved Territory Management by providing the following features:

- Template for creating a territory plan that covers all key topics for effective territory management (sales goals, strategic overview, strategies, tactics to achieve goals, target accounts, opportunities, partners, action plan)
- Pipeline information updates and shows progress vs. sales goals
- Dashboard and Reports enable Sales Managers and Territory Managers to monitor progress and direct activities to achieve goals
- Generate pdf of plan to share with others who do not have access to the system
- Access the app via web browser or Salesforce 1 Mobile

Contents

Screenshots pages 2-11
Specs page 12

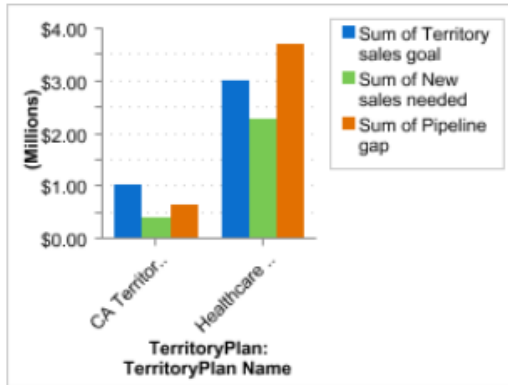
Dashboard

TPP: Terr Plan Dashbd

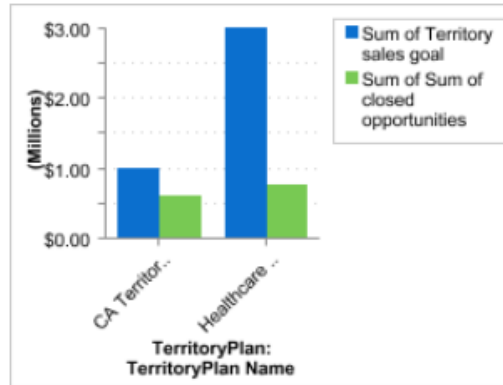
Find a dashboard... Edit Clone Refresh As of Today at 9:28 PM

Dashboard for effective Territory Management.

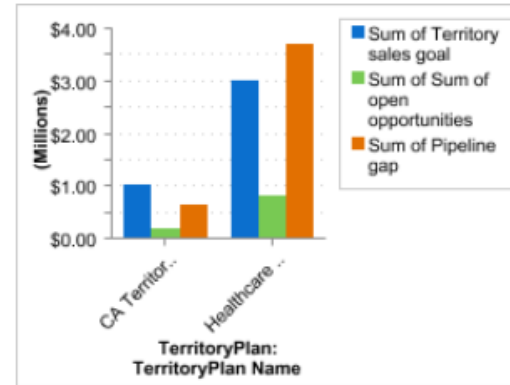
Goal, Gap, Sales Needed by Plan



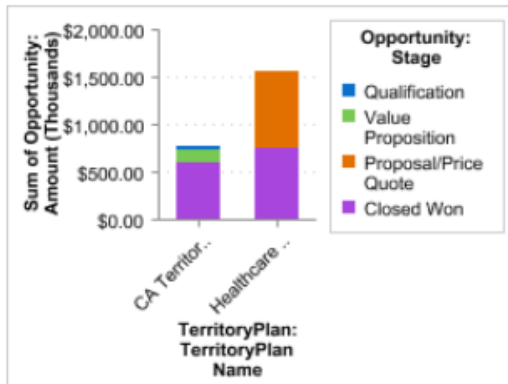
Goal vs. Closed Opp by Plan



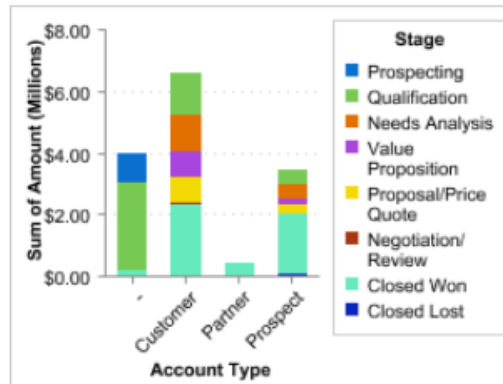
Goal, Gap, Open Opportunities by Plan



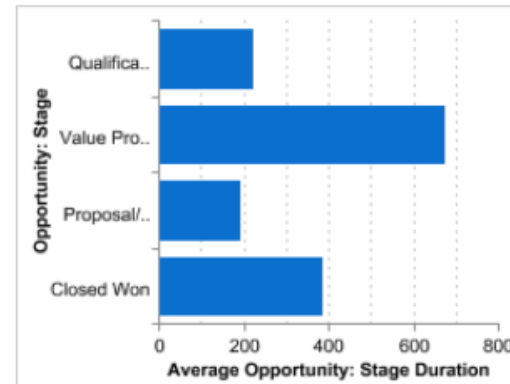
Opp Amount by Stage by Plan



Opp Amount by Stage by Account Type



Stage Duration by Plan



Reports

Reports & Dashboards

[New Report...](#) [New Dashboard...](#)

Folders

Find a folder...

All Folders

- Unfiled Public Reports
- My Personal Custom Reports
- My Personal Dashboards
- Account Plan Dashbds (Installed Package: A
- Account Plan Reports (Installed Package: A
- Company Dashboards
- Google AdWords Dashboards (Installed Pa
- Google AdWords Reports (Installed Packag
- Territory Plan Dashbds (Installed Package: T
- Territory Plan Reports (Installed Package: T**
- Account and Contact Reports
- Opportunity Reports
- Sales Reports
- Lead Reports
- Support Reports
- Campaign Reports
- Self-Service Reports
- Administrative Reports
- Activity Reports
- Product and Asset Reports
- Call Center Reports

Territory Plan Reports (Installed Package: Territory Plan)

Find reports and dashboards...

Action	Name ↑
	TPP: Activities, Strategy by Plan
	TPP: Amount by Opp Type by Plan
	TPP: Amount by Stage by Acct Type
	TPP: Amount by Stage by Plan
	TPP: Goal vs. Closed Opp by Plan
	TPP: Goal, Gap, Additional Sales by Plan
	TPP: Goal, Gap, Open Opps by Plan
	TPP: Goal, Gap, Sales Needed by Plan
	TPP: Stage Duration by Territory Plan
	TPP: Stage Duration History by Stage
	TPP: Territory Plan Summary
	TPP: Territory Plan Summary By Date
	TPP: Top Opportunities by Plan
	TPP: Top Opps by Type by Plan
	TPP: Usage Report

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Reports provide insight for plan implementation and management.

Territory Plan Screen: Goals, Numbers, Territory Overview

TerritoryPlan
Customize Page | Printable View | Help

CA Territory Plan

Show Feed

Strength, Weakness, Opportunity, Threat [4] | Strategies [3] | Open Activities [3] | Target Accounts [3] | Target Opportunities [3] | Partners in your territory [1] | Activity History [3] | App

Edit Delete Clone Generate PDF Select from All Accounts Select from My Accounts Bring in My Accounts

Select from All Opportunities Select from My Opportunities Bring in My Opportunities

TerritoryPlan Detail

TerritoryPlan Name: CA Territory Plan

Owner: [Ron Snyder \[Change\]](#)

Corporate Plan / Quota

Average opportunity size: \$100,000	Territory sales goal: \$1,000,000
Close ratio: 50%	Sum of closed opportunities: \$600,000
Number of new wins needed: 4	Additional sales from existing base: \$0
	New sales needed: \$400,000.00
	Pipeline needed: \$800,000
	Sum of open opportunities: \$30,000
	Pipeline gap: \$770,000

Personal Plan / Quota

Territory sales goal: \$1,250,000	New sales needed: \$650,000
Average opportunity size: \$100,000	Additional sales from existing base: \$0

Territory Overview

Industry trends impacting your territory: Challenges in meeting sales goals

Key trends in your geography: Economy still sluggish- except tech sector

Behavior and Territory Goals

Territory Goal #1	Increase sales to tech sector
Territory Goal #2	Build funnel by 30%
Territory Goal #3	Leverage current customer successes
Territory Goal #4	Build partner network

Narrative

Territory narrative: Leverage current successes and build partner network

Additional issue / info to consider: How to build partner network

Bring in Accounts and Opportunities.

Generate PDF.

App calculates Sales Needed, Pipeline Gap.

Identify Trends.

Identify Goals.

Territory Plan Screen: SWOT, Strategies, Activities

Strength, Weakness, Opportunity, Threat

New SWOT

Action	Type	SWOT Description
Edit Del	Strength	New rev provides unique capabilities
Edit Del	Weakness	Need to build visibility in market place
Edit Del	Opportunity	Need for our new product in Tech Sector
Edit Del	Threat	New, larger competitors entering market segment

Conduct SWOT Analysis.

Strategies

New Strategy

Action	Strategy	Tactic
Edit Del	Build funnel	Generate email campaign
Edit Del	Create Tech Sector focus program	Generate Tech Sector plan
Edit Del	win top influencers	list of top influencers

Generate Strategies and Tactics.

Open Activities

New Task

New Event

Action	Subject	Name	Task	Due Date	Status	Priority
Edit Cls	Generate email campaign: Build funnel		<input checked="" type="checkbox"/>	1/22/2016	Waiting on someone else	Normal
Edit Del	Meet re Tech Sector focus program	Charles Mendez	<input type="checkbox"/>	1/29/2016 10:30 AM		
Edit Cls	win top influencers: create list		<input checked="" type="checkbox"/>	2/5/2016	Not Started	Normal

From Strategies, generate Tasks & Events; connecting strategies to action.

Territory Plan Screen: Opportunities, Relationships, Team, Partners, Activities

Target Accounts New Target Account

Action	Account Name	Priority	Type	Account's compelling needs	Our differentiators	Our sales approach
Edit Del	Global Media	A	Prospect	Need to improve sales effectiveness	Sales Planning capability Easy to use and learn Cost effective	Contact key decision makers and discuss needs and our solution
Edit Del	General Motors	A	Customer	Need better territory management	Improves visibility across territories Enables effective territory plan implementation	Leverage success elsewhere in the industry and partner contacts
Edit Del	American Airlines	B	Prospect	Need to increase sales to existing accounts	Provides greater insight Ensures successful plan implementation Leverages market insights	Leverage current contacts to meet with decision makers

Prioritize and include Target Accounts, Opportunities, and Partners.

Target Opportunities New Target Opportunity

Action	Opportunity Name	Account Name	Type	Amount	Stage	Probability (%)	Close Date
Edit Del	GM: Territory Plan Pro	General Motors	Existing Business	\$600,000.00	Closed Won	100	9/16/2012
Edit Del	American Airlines: Account Plan Pro	American Airlines	New Business	\$20,000.00	Qualification	10	9/30/2013
Edit Del	Global Media: Sales Planning apps	Global Media	New Business	\$10,000.00	Qualification	10	4/30/2014

Partners in your territory New Partner

Action	Account Name	Contact	Partner relationship	Our Value to them	Their Value to us	Partner strategy
Edit Del	IBM Local	Linda Hunt	Strategic Alliance (Local)	We provide products IBM customers need	IBM has great contacts	Leverage IBM contacts to sell into their accounts

Activity History Log a Call Mail Merge Send an Email View All

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	ID x-sell opp list		<input checked="" type="checkbox"/>	7/18/2014	Ron Snyder	7/10/2014 10:13 PM
Edit Del	Meet with Linda Hunt re collaboration	Linda Hunt	<input type="checkbox"/>	4/29/2014 11:30 AM	Ron Snyder	4/16/2014 9:48 AM
Edit Del	sell new service: ID candidates- list		<input checked="" type="checkbox"/>	4/18/2014	Ron Snyder	7/10/2014 10:12 PM

Activity History

Target Account Strategy

Target Account Save Cancel New Account

Plan Information

TerritoryPlan CA Territory Plan Account Global Media

Account Strategy

Priority

Account's compelling needs

Account's strategic initiatives

Our product/ service

Our differentiators

Our sales approach

Partner Information

Partner who can help

Partner relationship

Partner strategy

Generate Strategy
for each
Target Account

Target Opportunity Strategy

Target Opportunity Save Cancel New Opportunity

Plan Information

TerritoryPlan [CA Territory Plan](#)
Opportunity Global Media: Sales Planning apps

Opportunity Strategy

Account's compelling needs/ events ? Need to improve sales effectiveness to increase sales results by 20%

Our product / service ? Account Plan Pro
Territory Plan Pro

Account's decision criteria ? Apps in SFDC
Help sales team do better sales planning

Our differentiators ? Sales Planning in SFDC
Easy to use and learn
Cost effective

Account's decision process ? Search for sales planning apps
Review apps
Team decides

Account's funding/ budget process ? VP Sales submits to President
President approves

Next steps ? Contact key decision makers and discuss needs and our solution

Generate Strategy
for each
Target Opportunity

Select Accounts and Opportunities Screens

Select Accounts and Opportunities

Check the box on the left of the name of the accounts or opportunities you want to include in the plan. Click on the column header (Name, Owner, etc.) to sort the table by that parameter. You can do a secondary sort by selecting the secondary sort and then apply. You can search by Account Name.

Select Accounts

Save Cancel First Last Secondary Sort: None Account Name: American Apply

	Name ▼	Owner	Priority	Type	Industry
<input checked="" type="checkbox"/>	American Airlines	Ron Snyder	B	Prospect	Transportation
<input type="checkbox"/>	American Cement Co	Ron Snyder			Construction

Save Cancel First Last

Select Accounts to include in plan.

You can choose to show closed opportunities. Otherwise only open opportunities are shown. You can search by Opportunity or Account Name.

Select Opportunities

Save Cancel First Last Secondary Sort: None Show Closed GM Apply

	Name	Account ▼	Owner	Amount	CloseDate	Type	StageName
<input checked="" type="checkbox"/>	GM: new BU	General Motors	Ron Snyder	90000.00	3/31/2016	New Business	Qualification
<input checked="" type="checkbox"/>	GM: Territory Plan Pro	General Motors	Ron Snyder	60000.00	1/8/2016	Existing Business	Closed Won
<input checked="" type="checkbox"/>	GM: OEM & Supplier Info Exchange System	General Motors	Ron Snyder	500000.00	2/26/2016	New Business	Needs Analysis
<input checked="" type="checkbox"/>	GM: new OEM supply chain product	General Motors	Ron Snyder	800000.00	11/22/2012	New Business	Qualification

Save Cancel First Last

Can show closed opportunities or only open opportunities.

Can show opportunities based on a string of characters.

Select Opportunities to include in plan.

Add Accounts and Opportunities into Territory Plans from Account, Opportunity pages

Your Salesforce.com Admin can add the following sections to your Account and Opportunity pages. See our Set Up Guide.

Add Accounts into Territory Plans from the Account Page

The Account page will now have this section in it. Users can add the account into the Territory Plan from the Account page using this section.

Target Accounts (Account)		New Target Account	Target Accounts (Account) Help ?
Action	Target Account: Potential Account	TerritoryPlan Name	
Edit Del	0039	BT Mid Mkt Phoenix	

Insert Account
into Territory Plan
from Account page

Add Opportunities into Territory Plans from the Opportunity Page

The Opportunity page will now have this section in it. Users can add the opportunity into the Territory Plan from the Opportunity page using this section.

Target Opportunities		New Target Opportunity	Target Opportunities Help ?
Action	Target Opportunity: Top Potential Prospect	TerritoryPlan Name	
Edit Del	0033	BT Mid Mkt Phoenix	

Insert Opportunity
into Territory Plan
from Opportunity
page

Report: Strategy to Action

Report tracks Strategy to Action.

Activity

Strategy & Tactic

Subject	Comments	Priority ↑	Status	Date
<input type="checkbox"/> TerritoryPlan: Owner Name: <u>Ron Snyder</u> (3 records)				
TerritoryPlan: TerritoryPlan Name: <u>CA Territory Plan</u> (3 records)				
<u>Meet re Tech Sector focus program</u>	Strategy:Create Tech Sector focus program Tactic:Generate Tech Sector plan	-	-	1/29/2016
<u>Generate email campaign: Build funnel</u>	Strategy:Build funnel Tactic:Generate email campaign	Normal	Waiting on someone else	1/22/2016
<u>win top influencers: create list</u>	Strategy:win top influencers Tactic:list of top influencers	Normal	Not Started	2/5/2016
Grand Totals (3 records)				

PDF: Plan Overview, Goals

Territory Plan: CA Territory Plan

Generated: 01-14-2016

Corporate Plan/Quota

Average opportunity size
Close ratio
Number of new wins needed

Territory Overview

Industry trends impacting
Challenges in meeting sales
Key trends in your geography
Economy still sluggish- exc

Behavior and Territory Goals

- Territory Goal #1**
Increase sales to tech sector
- Territory Goal #2**
Build funnel by 30%
- Territory Goal #3**
Leverage current customer
- Territory Goal #4**
Build partner network

Narrative

Territory narrative
Leverage current successes and build partner network
Additional issue / info to consider
How to build partner network

SWOT

Strengths

New product provided

Opportunities

Need for our new product

Strategies

Strategy Build funnel

Tactic Generate leads

Strategy Create Territory Plan

Target Accounts

Account General Motors

Priority

Type

Account's compelling needs

Need better territory management

Account's strategic initiatives

15% sales increase via effective

Our product/ service

Territory Planning app

Our differentiators

Improves visibility across territory

Our sales approach

Leverage success elsewhere in

Partner

Partner relationship

Partner strategy

Leverage success to win in GM

Opportunity GM: Territory Plan Pro

Account

General Motors

Amount

60000.0

Stage

Closed Won

Type

Existing Business

Close date

Jan 08 2016

Account's compelling needs/ events

Need to improve sales planning effectiveness

Our product / service

Territory Plan Pro

Account's decision criteria

Need Territory Planning app that works in SFDC

Our differentiators

Create plan easily, quickly Track strategies to action Manage plan implementation

Account's decision process

Review top 3 candidates Submit recommendation to VP Sales VP Sales decides

Account's funding/ budget process

Sales Manager submits to VP Sales VP Sales reviews with CFO for approval

Next steps

Meet with Sales Manager re solution to needs Meet with VP Sales and Sales Manager

PDF provides time-stamped record of plan.

Description

Territory Planning is designed to enable Territory Managers to create and implement territory plans to improve sales results. Typically, the planning process is performed at least once per quarter. It is used to guide the sales executive through all of the activities and pitfalls with running his or her top territory. Just as useful for a vertical focus, Territory Plan Pro provides the focus needed to achieve sales goals.

Features and Benefits

- **Standardize** the planning process across the entire sales force
- Enter quota, opportunity size; **app calculates number of deals needed**
- **The app calculates** sum of closed and open opportunities
- **Funnel requirement and gap** calculated by app- based on close ratio
- **Easily bring accounts and opportunities** into the plan via Select Account and Select Opportunity functions
- **Build a territory strategy and plan**; leveraging SWOT analysis
- Create a list of **target accounts and opportunities**
- **Create partner relationship strategies**
- **Generate tasks and events for each strategy**
- **Route** the plan to the manager for review, approval
- **Generate a PDF of the plan**
- **Reports and dashboards** to track and guide progress
- **Access plans** via a web browser or Salesforce 1 Mobile

Requirements

Salesforce.com Edition Enterprise
Unlimited
Professional

Contact us to use Territory Plan Pro for Group edition

Specifications

Publisher Plan 2 Win Software

Type Native Salesforce.com CRM application
Salesforce 1 Mobile ready

Salesforce.com AppExchange Partner Yes

Pricing \$150/year per user

- 30 Day Site license Free Trial by clicking "Get it now!"
- Discounts available for purchases of over 25 licenses total... including licenses of Account Plan Pro.
- Includes user training for teams of 5 and more