RESEARCH³⁶⁰

Converting Data Into Decisions

What is the **Research**³⁶⁰ Territory Manager?

Research³⁶⁰ **Territory Manager** is an online system used by manufacturers, pharmaceutical companies, sales organizations, franchise developers and other marketers to maximize the ROI of sales service and distribution field resources.

Using your data, **Territory Manager** generates a view of your current territories, and offers interactive alignment and optimization tools for managing them. Goals can include: maximizing underlying market potential; balancing workload; minimizing travel time; and more.

What does Territory Manager include?

Territory Hierarchies: You can manage up to five levels of territory hierarchy. For example: national division territories, regional territories, district, and representative territories. Maintain data security by selectively restricting access to data and territory views at the user level. You can align and optimize at any level of your territory hierarchy.

Confidently create national territory strategies that include all levels of your territory hierarchy in one, easy-to-use, territory management system: Territory Manager.

Territory Scenario Tracking & Management: Spend more time productively assessing and executing territory strategies, and less time creating maps. Territory Manager enables you to confidently decide on your most effective territory strategy by comparing and evaluating up to 5 territory alignment scenarios.
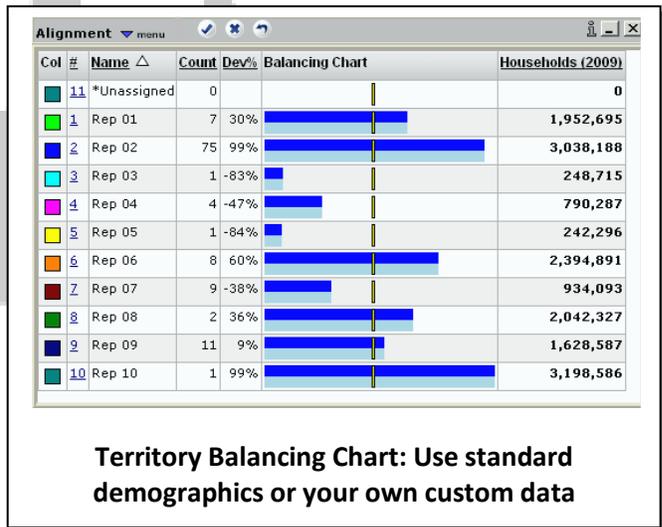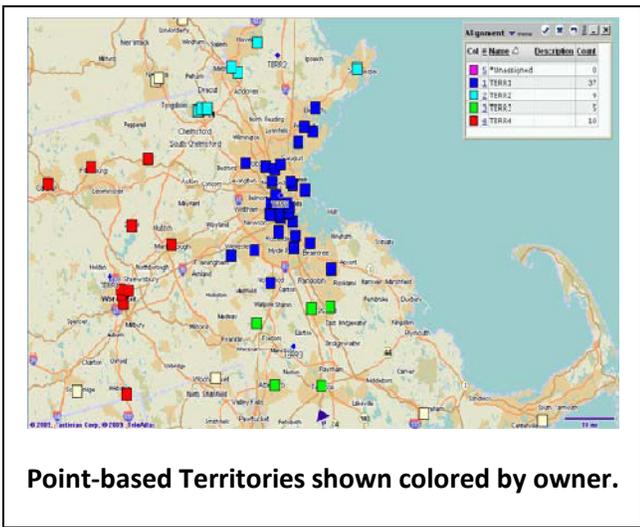
Online Territory Optimization: Territory Manager's powerful, national capacity territory optimization modeling capabilities are now accessible online at speeds hundreds of times faster than previously possible. Spend more time productively assessing a range of alternative territory strategies, improving the due diligence that supports your decisions.

Creative Output Features: Print your maps directly from Territory Manager or export easily to *Google Earth* for a unique look.
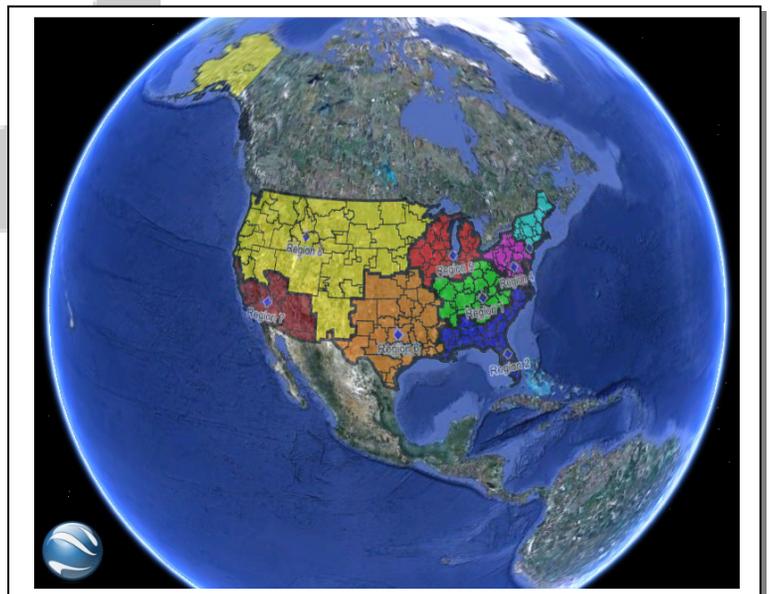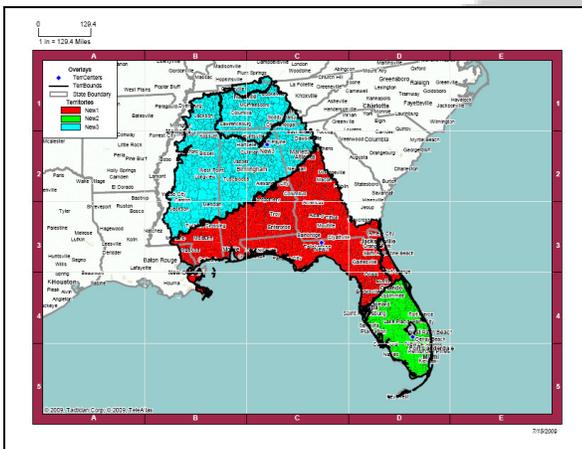
New Online Territory Features: Outlined below is a list of a few of the capabilities included to help you maximize the profitability of your territory coverage strategies:

• **Assign to Nearest** – automatically allocate any unassigned components the territory to which they are nearest. A huge time saver that significantly improves your productivity for most alignments.

• **Batch Mapping** – automates the printing of maps for any or all of your territories, at any level of your hierarchy, letting you focus on other territory-related tasks.

• **Permissions** – protect and secure sensitive data by controlling user level

• **Hierarchy Boundary Display** – enable / disable boundaries for any level of your territory hierarchy on any map, offering an on-demand, visual perspective of your territory scenario(s) that facilitates decision-making.

• **Restrict Geographies to be Included in an Alignment** – allow only the geographies that you want to include in your territories to be selected when choosing geographies to assign to territories.

• **Territory Locking** – 'lock' territories to ensure that selected portions of your territory hierarchy cannot be modified by others with alignment permissions. Confidently preserve the results of your alignment efforts.

• **Highlight Components on Map and Display Value** – hold your mouse pointer over a territory component on the map to highlight its boundary and to instantly view and assess component level information.

• **Manually Assign Components Among Territories** – align territories using a list of components rather than using the map. Save time when you are reassigning large blocks of geography among territories.

• **Test Alternative Territory Scenarios** - duplicate an entire territory hierarchy, and test a range of alignment scenarios to evaluate and refine decisions for improved results.

• **Return to a Previous Version of Your Territory Alignment** - revert to a previous version of your territory hierarchy and resume work from that point.

Point-based Territories shown colored by owner.

Territory Balancing Chart: Use standard demographics or your own custom data

Getting Started

The first step to achieving optimum territory coverage and generating relevant, actionable results for your business is to load your valuable data into Territory Manager.

Regardless of whether your data is stored in a spreadsheet program, a flat file, or your corporate database, our new, straightforward data import wizard is:

- **Easy** - The wizard guides you through the import steps and is supported by "i" Help information buttons and sample import files to speed and simplify setup.

- **Reliable** - The import process checks the structure of your territory import file, providing continual feedback to give you confidence that the results of the import will accurately reflect your territory structure.

- **Flexible and Scalable** - Import territory definitions and data from a broad range of file types of varying sizes. Quickly and easily import large data sets, e.g. 50,000 ZIP Codes assigned to 500 territories.

Importing Your Data

Using the **Import Wizard**, **Territory Manager** automatically builds the maps and data structures that support up to five levels of your complete territory hierarchy: e.g. Divisions, Regions, Districts, Territories, etc.

Minimize Preparation Time

Research[360] **Territory Manager** offers a range of built-in controls that address a range of practical territory management issues including: properly defining "white space"; ensuring that leading zeros are not dropped when importing ZIP Codes (an Excel issue); designing your territory hierarchy; defining performance monitoring measures; and more – all designed to save time and improve productivity – allowing you to spend more time building strategies, and less time setting up.

Help Along the Way

Your time is valuable. To save time and ensure that you are productive, **Research**[360] **Territory Manager** "i" Help is always available, providing access to assistance when undertaking territory projects.

Feedback is continually available. For example, during the data import process you can preview your data and verify the data values included in your import file. You can be confident that your data has been properly interpreted and you will be ready to work with your territories.

Finally, to demonstrate how the system works, **video demonstrations** of the features and capabilities of Territory Manager are available in the extensive Online Help system that is accessible from the "i" Help buttons

Getting into Business

After importing your territory hierarchy and related data, it's time to start developing territory strategies that optimize territory coverage, maximize your ROI and improve your market share.

The Strategy Map

Strategy Map is the geographic and data dashboard that centralizes, coordinates, and provides interactive access to all aspects of your territory work.

Strategy Map offers you:

- **Your territories displayed on a full screen interactive map** - based on the world's fastest, most advanced marketing environment, Strategy Map's clear and easy-to-read interface enables you to perform territory optimizations, alignments, and analysis to make more enlightened territory coverage decisions based on the factors that drive your business. Browser-based Strategy Map is also a great way to communicate your strategic territory goals and message to your organization.

- **Your territory hierarchy** - using a collapsible / expandable drill down interface, you can quickly navigate, access, and display maps with corresponding data for any territory at any hierarchical level. Add / create, optimize, align, or just view your entire territory structure - or just the subset that requires your attention.

- **Your territory data** - data that you select is displayed in a floating Alignment panel. Data is aggregated for each level in your hierarchy, offering you the ability to quickly measure and assess key indicators across your territories and territory hierarchies.

- **Your territory alignment status** - to help you identify territories and geographic areas that require fine-tuning, realignment, or optimization, a balancing chart with deviation calculations is displayed in the Alignment panel. The impact of every change is instantly calculated and displayed in the Alignment panel, dramatically cutting decision-making time.

Using Strategy Map you can:

- Add territories and additional levels of hierarchy to achieve the optimum territory coverage required to maximize your ROI.

- Navigate quickly and easily through your hierarchical structure to view any territory in your hierarchy table.

- Drill down through the map to access your territory data. Click for interactive territory 'Flash Reports' corresponding to any level of a territory hierarchy.

- Display the map boundaries for any level of your territory hierarchy. Align and optimize, viewing the results through the prism of your territory structures.

- Duplicate entire territory hierarchies to compare, contrast, and explore alternate territory scenarios and strategies.

- Start building your territory strategy from scratch. Or, use parameters that you set, and let **Research**[360] Territory Optimization Model create ideal territories for you.

- Return to a previous version of your territory hierarchy by reverting to a previous version of any alignment strategy, and resume work from that point.

Territory Optimization

Generate optimum territory strategies based on parameters and goals that reflect your business objectives.

For example, if you want to create hundreds of sales territories, across thousands of components (e.g. ZIP Codes, customers, prospects, hospitals, etc.), and your objective is to maximize selling time and create balanced territories, **Research**[360] Territory Optimizer can achieve your objective in minutes, completing an analysis that would otherwise take weeks.

The flexible Territory Optimizer enables you to test multiple territory scenarios and strategies such as adding additional territories, eliminating territories, and setting specific goals for each territory. You can select a subset of your territory hierarchy to participate in an optimization; minimizing either straight line distance or travel time.

Run Territory Optimizations with Unparalleled Precision

Territory Optimizer with TravelTime™ takes into account not just highways, but all streets of all sizes. Confidently refine and fine-tune your territory strategy, knowing that your optimization is precise and reliable.

Run Territory Optimizations with Unparalleled Speed

Territory Optimizer with TravelTime™ has the speed and capacity required to optimize nationwide, based on allocating over 30,000 components - in just minutes enabling you to dramatically improve your efficiency by testing multiple resource deployment scenarios. **Online Optimization**	**Compare these speeds with your current system**
50 Territories in California with 2,658 ZIP Code components	17 seconds
10 Territories in Massachusetts with 706 ZIP Code components	9 seconds
100 Territories with 29,901 ZIP Code components	22 minutes 4 seconds

Optimization Results

When optimization is complete you get a report that details each step of the optimization process, and the optimized territories display in Strategy Map.

Choose from a range of reports that facilitate communicating the optimization results. You can include comparisons to the initial alignment scenario, or to another alignment scenario that you select.

Communicating Your Territory Strategy

Clearly communicating your territory strategy, goals and message to your team is critical to successful execution of your territory plan, and your ability to maximize the plan's ROI. **Research**[360] **Territory Manager** makes information and strategic goal sharing easy.

Territory Reports

Generate territory reports that clearly communicate your territory hierarchies, data, and coverage decisions. Optionally select another territory hierarchy to be compared against your recommended territory solution.

Research[360] offers a rich set of marketing databases that can be licensed in conjunction with Territory Manager. These optional data sets offer access to thousands of variables supporting a broad range of pre-formatted online marketing reports. This valuable industry and market data can be paired with your proprietary territory data to provide unique insight and perspective on your territory performance.

You can save reports, retrieve them at any time, and email them to anyone - whether or not recipients are subscribers to Territory Manager.

Territory Maps

Customize your maps and print them individually, or in batch mode. With a single click, you can print individual maps for all of your territories, at any level of your territory hierarchy.

Dissemination to the Field

Provide field personnel with access to your corporate endorsed territory strategy. Field access to territory alignment functionality, data sets, and individual territories or subsets of the territory hierarchy are controlled by a central administrator. Users can be restricted to only access and view the subset of the territory hierarchy for which they are approved.

Research[360]'s secure, online territory solution is a breakthrough. You can, with unparalleled speed and precision, provide access to and solicit feedback from your personnel in the field to speed adoption of your corporate territory strategy.

Research[360] **Territory Manager** offers online tools to encourage feedback from the field: local knowledge, local ownership, and local support – all vital to the successful execution of your strategy

Give your field personnel permission to optimize or realign territories, or limit some field personnel to simply viewing territories, thereby protecting your initial territory hierarchy. Recommended scenarios generated in the field can be accessed, viewed, and evaluated by senior management. Approved changes can be easily integrated into the nationwide territory hierarchy.

Getting Data Out

Once your territory strategy has been finalized and fully approved, you can export the final territory hierarchy in a generic format, making it available for integration with the areas of your business that are impacted: compensation systems, human resources, IT, etc. Territory Manager facilitates the process of bringing reality to strategy.

Additional Notes

The following sections will help you better understand Territory Manager and help you to incorporate Territory Manager as an integral component of your business strategy.

Glossary of Research[360] Territory Manager Terms

aggregation - adding up variable values for one level of territory hierarchy to the next level up in the hierarchy. For example, sales figures for each territory component are aggregated to the territory level so that you can view the total sales value for the territory. Sales values for individual territories can then be aggregated to the district level, resulting in the total sales for the district.

balancing variable - the user-selected variable on which territories are balanced when optimizing territories.

components - the units, either areas such as ZIP Codes or coordinate point locations such as hospital locations, that comprise a territory.

district - by default, the level of hierarchy above Territories when importing a territory hierarchy. For example, the sales representative's territory is included in District 5.

division - by default, the level of hierarchy above Regions when importing a territory hierarchy. For example, the Northeast Region is included in the Eastern Division.

floating territory bases - a territory base that is allowed to move to its optimum location during a territory optimization. For example, you might run a territory optimization to determine where territory bases ought to be placed in order to maximize performance and minimize distance traveled, and assess the difference between optimum base location and actual base location.

hierarchy - a group of territories organized into orders or ranks, each subordinate to the one above it. For example, a Territory is included in a District, a District is included in a Region, and a Region is included in a Division.

participates - an indicator used when running the Territory Optimizer that indicates whether or not the territory will be included in the optimization process. Only territories marked for participation are included in the optimized results. The Participates option is used to exclude territories that do not need to be changed.

point-based territories - territories whose components are locations with specific geographic coordinates. For example, a pharmaceutical company representative might have components that are doctor's office locations. The representative has a point-based territory. (see image on page 2)

region - by default, the level of hierarchy above Districts when importing a territory hierarchy. For example, District 5 is included in the Northeast Region.

target - the territory owner to whom selected components will be assigned. For example, if you are adding components to Mary and taking from Hank and Tom, Mary is the target.

territory alignment - the interactive process of adding components to, while simultaneously removing components from, multiple territories.

territory bases - the location at which a territory owner is located. For example, if the territory owner is a sales representative, the territory base might be the representative's home address or the office from which the representative works.

territory owner - the name of the territory to which a territory component, or territory sub-hierarchy, is assigned.

territory components - the items, either point-based or area based, that comprise a territory. For example, a group of doctor's offices would be point-based components. A group of ZIP Codes would be area based components.

Territory Optimizer™ - an optimization model that automatically creates the lowest cost solutions based on factors such as workload and travel time.

TravelTime™ - the time it takes to travel, over a series of street networks, from one location to another.

weight - a weight assigned to a territory before optimization that influences whether the territory can handle less than average, average, or greater than average aggregate levels of the user-specified, balancing variable. For example, if balancing on workload, a newly hired salesperson might have a weight of .7, while a veteran salesperson might have a weight of 1.3

FAQs

Can I lose my data?
Our secure servers guarantee that you will never lose the data that you upload to **Research**[360] . Our technology partner, Tactician, guarantees that the data you load is safe and secure.

Is the data that I upload guaranteed to be secure?
Your data is stored at a physically secure facility, firewalled, protected against interception of username / password, in a secure database accessible only to Tactician Web Server Administration personnel.

How fast is Territory Manager compared to desktop solutions?
The powerful online territories engine combined with easy to understand interfaces speeds up Online Territory Alignment, and makes distributing optimization results to your sales force instantaneous.

Can I 'Undo' operations in Territory Manager?
Yes. When aligning in Territory Manager, you can undo your last assignment. If you've made changes that you are not happy with, simply click Undo to revert to the territory settings that you had before you made the change.

Can I see how my analysis has changed over time?
Using Manage Versions, you can view previous versions of your analysis to review changes to your territory alignment over time. You can monitor changes at each level of your hierarchy, even tracking how individual component assignments have changed across alignments.

Can I give selected users 'View Only' access?
Yes. Your administrator can set permissions at the user level which either: restrict usage to territory viewing only, prohibiting them from making any territory changes; or permit interactive territory alignment, enabling managers to use their market knowledge to fine tune their territories.

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