

# How Territory Management Reduced Time Spent On Administrative Activities By **75%**



# THE CHALLENGE

The customer is a multi-million dollar real estate company that employs over 500 people across the US. They used an almost manual process to collect data about accounts and opportunities in different territories for a long time.

- » Though they managed to complete the task, it was consuming a lot of time and making it extremely challenging to effectively assign data and accounts to team members.
- » They wanted to implement the Salesforce Territory Management tool to structure their teams and enable them to manage their respective territories based on account characteristics such as ZIP codes, industry-specific clients, revenue, and more custom metrics.

# THE GROWTH NATIVES TEAM'S SOLUTION

We conducted a free in-depth Salesforce audit and identified the issues related to their accounts, contacts, opportunities, cases, and contacts. We also streamlined their allocation process by creating straightforward rules about assigning a specific lead to agents in a particular geolocation.

We also created role-based access to different Salesforce users in the company to help prevent distractions from excess information flashing on their screens. Our team collaborated with the client to analyze their ongoing process and cultivate the best solution for their enormous real estate business.

Here is a quick look at the process we followed:

- » We created a territory-based hierarchy within the system and assigned access to data based on an employee's role in the company.
- » The territory hierarchy structure allowed the regional managers and sales heads to view their specific geolocations with a bird's eye.
- » After establishing the territory-based hierarchy, we added different regions and subregions to the list while assigning roles to agents in those areas.
- » We also created unique account assignment rules for different territories; the agents could access the accounts related to their target portfolio.
- » While the regional directors retained access to accounts in their territories, they could not access them in other territories.
- » The Head of Sales received complete access to all territory accounts, allowing them to evaluate each territory's performance with factual data.



# RESULT AND IMPACT

Our Salesforce Territory Management implementation helped the client improve their agents' performance and motivated their regional managers to make their territory the top-performing name on the leaderboard. They experienced enhanced productivity and increased revenue for the company.

**47%**

Increase in the process of taking the lead from the nurture to the closure stage in two months.

**75%**

Reduction in time spent on administrative activities like manual preparation of excel sheets.

**22%**

Average increase in revenue across the board for all the different territories of the company.



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