

Oracle Sales Cloud Territory Management



KEY FEATURES

- Rich customer, channel, and product attributes
- Named accounts
- Territory proposals
- Simplified territory administration
- Real-time territory metrics
- Embedded analytics
- Centralized or decentralized territory administration with delegated authority
- Date effective sales territories and versioning
- File-based import and export

KEY BENEFITS

- Detect gaps and overlaps in territory coverage
- Optimize territory coverage for existing markets as well as expansion into new markets
- Model sales territories for simple or complex sales force
- Assess business impact of territory changes prior to deployment
- Preview results of account, contact, household, lead, and opportunity assignments
- Define territories for different types of sales resources, including prime, overlay, partner, inside sales, and channel sales

Oracle Sales Cloud delivers complete territory management capabilities that enable organizations to maximize market and account coverage and improve overall sales performance. With process automation capabilities and powerful, easy-to-use tools for territory planning, modeling and on-going territory management, sales managers can make more insightful sales planning decisions and align sales execution with the overall sales strategy.

Fully Integrated Territory Management

Territories give organizations the ability to define their unique sales organization structure within Oracle Sales Cloud. Territories define the hierarchy of the sales organization, business units within the sales organization, and areas of responsibility for each sales resource.

Once defined, territories are used in Oracle Sales Cloud to assign accounts, contacts, households, partners, opportunities, and leads to the right sales reps. Territories are also used for these key sales processes:

- Sales Forecasting
- Partner Relationship Management and Channel Sales
- Sales Quota Planning and Allocation
- Incentive Compensation and Sales Performance Management

Territory Name	Territory Owner	Forecast	Won Revenue	Open Pipeline	Quota
Forecast Q1-2016					
West - Products - Div I	Lisa Jones	\$1,580,706.50	\$0.00	\$0.00	\$2,000,000.00
West - Products - Div II	Julian Henderson	\$3,354,000.00	\$0.00	\$0.00	\$1,500,000.00
West - Products - Div III	Cindy Cochran	\$516,000.00	\$0.00	\$0.00	\$562,500.00
West - Products - Div IV	Helena Sprague	\$2,327,160.00	\$0.00	\$0.00	\$1,250,000.00
West - Products - Div V	Ralph Ambers	\$1,290,000.00	\$0.00	\$0.00	\$687,500.00
My Forecast Items	Mateo Lopez	\$0.00	\$0.00	\$0.00	\$6,000,000.00

Image 1: Sales Managers can view sales forecasts by territory.

ORACLE CUSTOMER EXPERIENCE: SALES CLOUD

- **Complete:** A comprehensive sales solution focused on driving performance and connecting business processes.
- **Innovative:** Productivity-driven apps offering deep customer insight with the flexibility to adapt and differentiate.
- **Proven:** Power global sales organizations and leverage recognized industry expertise for secure and scalable global operations.

RELATED PRODUCTS

- Oracle CPQ Cloud
- Oracle Marketing Cloud
- Oracle Service Cloud
- Oracle Commerce Cloud
- Oracle Incentive Compensation
- Oracle Social Network Cloud
- Oracle Transactional Business Intelligence Enterprise for CRM Cloud Service

Flexible Territory Planning

Oracle Sales Cloud provides powerful territory planning capabilities with multiple territory dimensions to define even the most complex sales organization. Available territory dimensions include the following standard dimensions and three configurable dimensions:

- Account Type
- Business Unit
- Customer Size
- Organization Type
- Geography
- Product
- Sales Channel
- Industry

In addition to dimension-based territory definitions, Oracle Sales Cloud offers named account territories and named partner territories.

Territory Management enables sales organizations to quickly create multiple territory proposals in order to do “what if” analysis and evaluate the pros and cons of different territory structures.

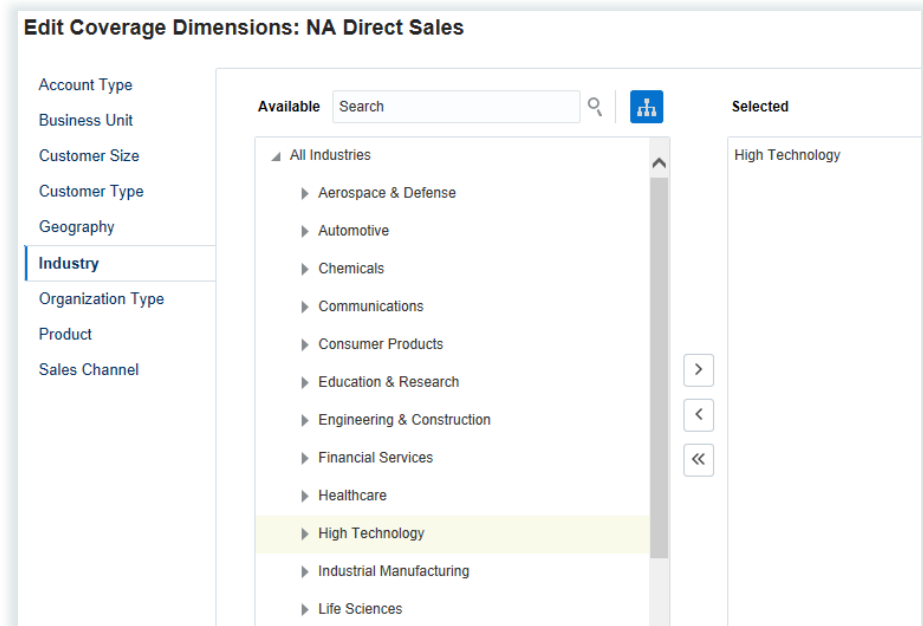


Image 2: Multiple territory dimensions make it possible to define any sales structure.

Powerful Territory Modeling

Oracle Sales Cloud offers the unique ability to easily model different territory definitions without impacting active territories. Sales managers and sales operations staff have powerful tools to validate territory proposals, uncover gaps, and identify overlaps in coverage. Additionally, Oracle Sales Cloud offers graphical analytics that help evaluate the business impact of territory changes and show previews of account, contact, household, opportunity and lead assignments.

Once sales executives have chosen the most optimal territory structure, they can easily set an effective date for the proposed changes.



Image 3: Analytics offer insights that sales managers can use to balance sales territories.

Territories

View Gaps: Global Consumer Sales

Evaluated Territories: NA Consumer Sales - Central, NA Consumer Sales - East, NA Consumer Sales - West

Gaps

Actions | View | Format

Geography	Product	Business Unit	Industry
Canada	Consumer	Any	Any

Image 4: Sales managers can evaluate coverage gaps for territory proposals.

Simplified Territory Administration

Sales executives can use a simple user interface to view and update active territories. They can also view key metrics for their territories such as past revenue performance, current sales opportunities and even the market potential for new business based on predictive models. Lastly, they have access to powerful embedded analytics to help them compare territories and identify when territories are not properly balanced.

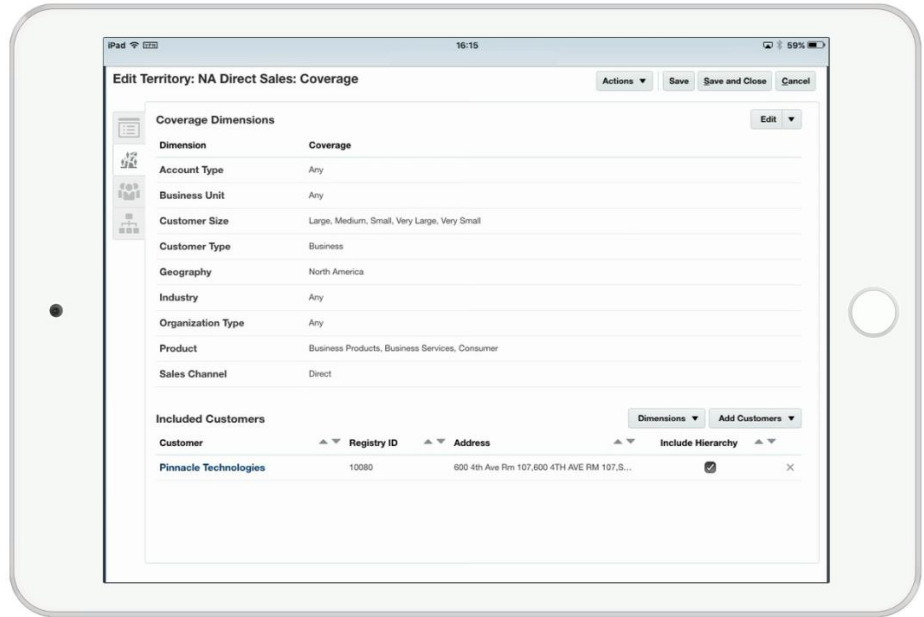


Image 5: Sales managers can easily view territory details, including coverage dimensions.

Streamlined Implementation

Oracles Sales Cloud implementation is made easy with the ability to define the territory structure in the test environment, perform full testing, and migrate those definitions into production using file import. Organizations may import territory definitions as often as necessary, beginning with a small data set and expanding into a fully defined territory structure.





File export allows organizations to fine tune planned territory definitions en-masse, review and update them offline, and then import the changes. At any time, export and import processes make it possible to facilitate further offline review and update cycles.

CONTACT US

For more information about Oracle Sales Cloud Territory Management, visit oracle.com or call +1.800.ORACLE1 to speak to an Oracle representative.



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