

Territory Management

Coverage Philosophy



The Safe Choice

Coverage Philosophy

Who are we are calling on?



The Safe Choice



The Safe Choice

Coverage Philosophy

Design an approach that allows the sales person to spend the most time in front of customers that have the most money to spend.

Seventy (70) cents on the dollar is spent by A and B fleet size customers

**** Fleets of 10 machines or larger***

Coverage Philosophy

How does your dealership classify
Account priority?

- Number of employees?
- Revenues?
- Number of Lift Trucks?
- Other?

Coverage Philosophy

Are these account classifications incorporated into your coverage plan?

Contact frequency?

Who gets how much attention?

How much time do you have to give?

Coverage Philosophy

• TAP Sample

Company	Address	City	County	State	Zip Code	EDA Units Purchased + Hyster Installs Over a 6.5 Year Period 2002 -		Market Segment
						2008		
Cinram Incorporated	4905 Moores Mill Rd	HUNTSVILLE	MADISON (AL)	AL	35811	160		A
New South Express Llc	200 Homer Dr	TALLADEGA	TALLADEGA (AL)	AL	35160	133		A
HYUNDAI MOTOR MFG	7515 HALCYON SUMMIT DR.	MONTGOMERY	MONTGOMERY (AL)	AL	36117	81		A
MERCEDES BENZ US INTL INC	1 Mercedes Dr	VANCE	TUSCALOOSA (AL)	AL	35490	75		A
MERCEDES BENZ	1750 MERCEDES DRIVE	VANCE	TUSCALOOSA (AL)	AL	35490	72		A
GEORGIA PACIFIC	7530 HIGHWAY 114	PENNINGTON	CHOCTAW (AL)	AL	36916	71		A
Lift Service Incorporated	1110 Highway 20	TUSCUMBIA	COLBERT (AL)	AL	35674	67		A
Sara Lee Corporation	106 Sweet Sue Dr	ATHENS	LIMESTONE (AL)	AL	35611	63		A
INTERNATIONAL PAPER	16504 COUNTY ROAD 150	COURTLAND	LAWRENCE (AL)	AL	35618	62		A
BUFFALO ROCK CO	111 OXMOOR ROAD	BIRMINGHAM	JEFFERSON (AL)	AL	35209	60		A
Eagle Leasing Incorporated	1 Covan Drive	Midland City	DALE (AL)	AL	36350	58		A
MERCEDES BENZ US INTL INC	1 MERCEDES DRIVE	VANCE	TUSCALOOSA (AL)	AL	35490	57		A
INTERNATIONAL PAPER CO	264 COUNTY RD 888	SELMA	DALLAS (AL)	AL	36703	54		A
Adams Brothers Produce Co	302 Finley Ave W	BIRMINGHAM	JEFFERSON (AL)	AL	35204	52		A
C.S.A. EQUIPMENT, INC.	ALABAMA STATE DOCKS	MOBILE	MOBILE (AL)	AL	36602	49		A
KIMBERLY CLARK CORPORATION	207 BAY BRIDGE ROAD	MOBILE	MOBILE (AL)	AL	36610	47		A
GLOVIS ALABAMA LLC	151 FOLMER PARKWAY	MONTGOMERY	MONTGOMERY (AL)	AL	36105	46		A
U O P Limited Liability Co	1 Linde Dr	CHICKASAW	MOBILE (AL)	AL	36611	45		A
ASSOCIATED GROCERS OF ALA	3600 VANDERBILT RD	BIRMINGHAM	JEFFERSON (AL)	AL	35217	45		A
SMART ALABAMA LLC	121 Shin Young Dr	LUVERNE	CRENSHAW (AL)	AL	36049	44		A
Russell Corporation	755 LEE ST	ALEXANDER CITY	TALLAPOOSA (AL)	AL	35010	43		A
WEYERHAEUSER CO	7616 HIGHWAY 10 W	PINE HILL	WILCOX (AL)	AL	36769	42		A
Solutia Incorporated	PO BOX 97	GONZALEZ	ESCAMBIA (FL)	FL	32560	42		A
BUFFALO ROCK CO	111 Oxmoor Rd	BIRMINGHAM	JEFFERSON (AL)	AL	35209	40		A

Action: Validate fleet sizes within the sample



The Safe Choice

Coverage Philosophy

Customer Segmentation by Fleet Size :				# of Accounts	%	# of Trucks	%	Call Frequency ??	Calls
A	20	+		59	1.8%	2,404	24.5%	30 days	708
B	10	to	19	118	3.6%	1,597	16.2%	60 days	708
C	5	to	9	255	7.8%	1,657	16.9%	90 days	1020
D	1	to	4	2,848	86.8%	4,171	42.4%	120 days	8544
				3,280	100.0%	9,829	100.0%		10980
Days	Vac	Holiday	Sick	Available	Calls/Day	Calls	Reps	Total Calls	Variance
260	15	15	5	225	6	1350	4	5400	(5580)

Action: Procure the balance of the data for your own study



The Safe Choice

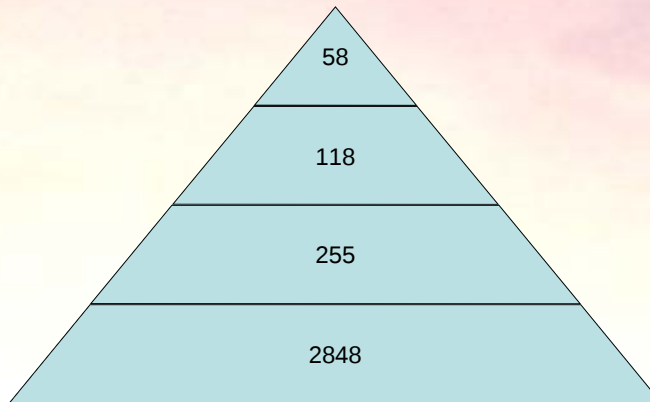
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D	1	to	4	2,848	86.8%	4,171	42.4%	????	0
				3,280	100.0%	9,829	100.0%		2436
Days	Vac	Holiday	Sick	Available	Calls/Day	Calls	Reps	Total Calls	Variance
260	15	15	5	225	6	1350	4	5400	2964

Action: Establish and Reinforce a Call Plan

Coverage Philosophy

- Establish criteria and expected frequency
 - A. 20+ Machines; 30 day call cycle
 - B. 10-19 Machines; 60 day call cycle
 - C. 5-9 Machines; 90 day call cycle
 - D. 1-4 Machines; Direct Mail / Telemarketing



TAP (EDA, Installs) Weighting

27
71
147
255

Accounts in Revenue Quartiles

Coverage Philosophy

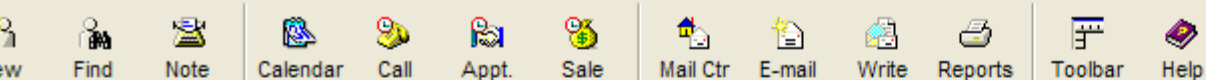
- Require Activity as this involves the:
 - Dealer's biggest asset; customers and
 - Dealer's biggest investment; employees.
- Provides you with a systematic coverage plan
 - Sales recruitment and retention
 - Enterprise value of the dealership
- Helps allocate time to the greatest potential
- What are you using to capture and retrieve information?

Coverage Philosophy

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 - Dealer's biggest asset; customers and
 - Dealer's biggest investment; employees.
- Provides you with a systematic coverage plan
 - Sales recruitment and retention
 - Enterprise value of the dealership
- Helps allocate time to the greatest potential
- What are you using to capture and retrieve information?
- Needs automation
 - Excel
 - Outlook
 - Goldmine

If you've got the tool—USE IT!

If you haven't got the tool—GET IT!!



Company: [Steelcase Incorporated](#)

Contact:

Dept: Last:

Title: Dear:

Source: Asst:

Phone1: (616)243-7524

Ext:

Phone2:

Ext:

Phone3:

Ext:

FAX: (616)246-4253

Ext:

[E-mail:](#)

[Web Site:](#)

Address: 1040 40Th St

Product Type: [LT](#)

Fleet Size: [LTb](#)

SIC: [25](#)

Customer Number: [E526978](#)

HERO Link:

County Name: [Kent](#)

Merge:

Summary Fields GM+View Notes Contacts Details Referrals Pending History

LT Salesman: [Jerry](#)

LT CSR:

LT Territory: [B3](#)

LT Prim Supp: [Crown](#)

ITA Class: [C2, C5](#)

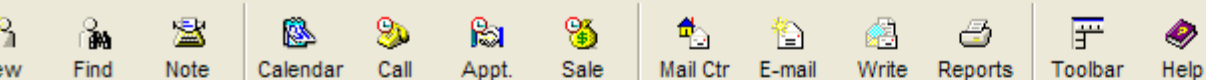
LTMaint: [In-House](#)

Purchase Prob

Multi Locations: [Yes](#)

Used Equip Pros:

Lease Exp.:



Company: [Steelcase Incorporated](#)

Contact:

Dept: Last:

Title: Dear:

Source: Asst:

Phone1: (616)243-7524

Ext:

Phone2:

Ext:

Phone3:

Ext:

FAX: (616)246-4253

Ext:

[E-mail:](#)

[Web Site:](#)

Address: 1040 40th St

:

:

City: [Grand Rapids](#)

State: [MI](#)

Zip: [49508](#)

County Name: [Kent](#)

Merge:

Product Type: [LT](#)

Fleet Size: [LTb](#)

SIC: [25](#)

Customer Number: [E526978](#)

HERO Link:

[CE;///Construction Eq.](#)

[EP;///Engineered Products](#)

[LT;///Lift Truck](#)

[PBC;///Personnel/Burden Carriers](#)

[RC;///Railcar Mover](#)

Summary > **Fields** > GM+View > Notes > Contacts > Details > Referrals > Pending > History >

Lookup window...

LT Salesman: [Jerry](#)

LT CSR:

LT Territory: [B3](#)

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ITA Class: [C2, C5](#)

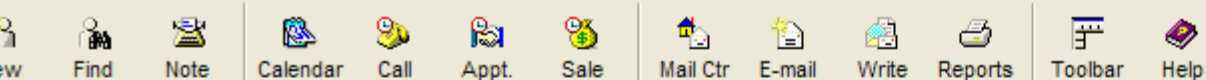
LTMaint: [In-House](#)

Purchase Prob

Multi Locations: [Yes](#)

Used Equip Pros:

Lease Exp.:



Company: [Steelcase Incorporated](#)

Contact:

Dept: Last:

Title: Dear:

Source: Asst:

Phone1: (616)243-7524

Ext:

Phone2:

Ext:

Phone3:

Ext:

FAX: (616)246-4253

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HERO Link:

CEa;// 20+

CEb;// 10-19

CEc;// 1-9

LTa;// 25+

LTb;// 10-24

LTc;// 5-9

LTd;// 1-4

Lookup window...

Summary Fields GM+View Notes Contacts Details Referrals Pending History

LT Salesman: [Jerry](#)

LT CSR:

LT Territory: [B3](#)

LT Prim Supp: [Crown](#)

ITA Class: [C2](#), [C5](#)

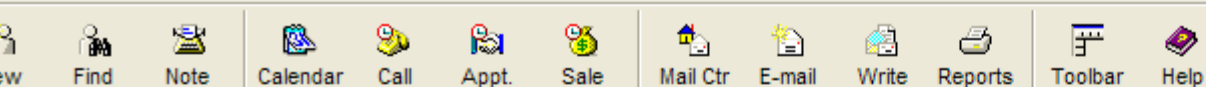
LTMaint: [In-House](#)

Purchase Prob

Multi Locations: [Yes](#)

Used Equip Pros:

Lease Exp.:



Company: [Steelcase Incorporated](#)
 Contact:
 Dept: Last:
 Title: Dear:
 Source: Asst:

Address: [1040 40Th St](#)
 :
 :
 City: [Grand Rapids](#)
 State: [MI](#) Zip: [49508](#)
 County Name: [Kent](#) Merge:

Phone1: [\(616\)243-7524](#) Ext:
 Phone2: Ext:
 Phone3: Ext:
 FAX: [\(616\)246-4253](#) Ext:
[E-mail:](#)
[Web Site:](#)

Product Type: [LT](#)
 Fleet Size: [LTb](#)
 SIC: [25](#)
 Customer Number: [E526978](#)
 HERO Link:

Summary \ **Fields** \ GM+View \ Notes \ Contacts \ Details \ Referrals \ Pending \ History \

LT Salesman:

LT Territory: [B3](#)

ITA Class: [C2](#), [C5](#)

Purchase Prob

Multi Locations: [Yes](#)

d Equip Pros:

Lease Exp.:

Bill

Jerry

Mary

Mike

Steve

Lookup window...

Company: [Steelcase Incorporated](#)
 Contact:
 Dept: Last:
 Title: Dear:
 Source: Asst:

Address: [1040 40th St](#)
 :
 :
 City: [Grand Rapids](#)
 State: [MI](#) Zip: [49503](#)
 County Name: [Kent](#) Merge:

Summary Fields GM+View Notes

LT Salesman: [Jerry](#)
 LT Territory: [B3](#)

ITA Class: [C2, C5](#)

Purchase Prob

Multi Locations: [Yes](#)

Used Equip Pros:
 Lease Exp.:

- A1
- A2
- A3
- A4
- A5
- B1
- B2
- B3**
- B4
- B5
- C1
- C2
- C3
- C4
- C5
- D1
- D2
- D3
- D4
- D5

Lookup window...

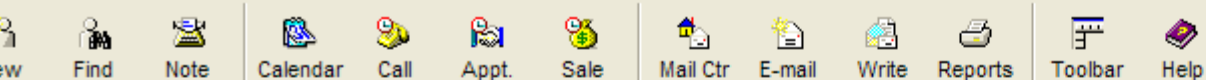
LT Prim Supp: [Crown](#)

LTMaint: [In-House](#)

1: [\(616\)243-7524](#) Ext:
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 3: Ext:
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Product Type: [LT](#)
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Generals Pending History



Company: [Steelcase Incorporated](#)
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- C2;
- C3;
- C4;
- C5;

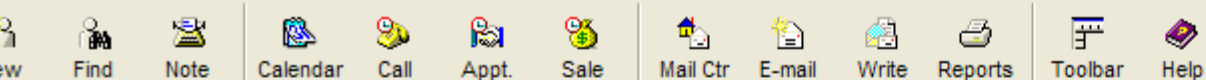
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LT Prim Supp: [Crown](#)

ITA Class: [C2, C5](#)

LT Maint: [In-House](#)

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Multi Locations: [yes](#)

No

Yes

Lookup window...

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Lease Exp.:

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LT Territory: [B3](#)LT Prim Supp: [Crown](#)ITA Class: [C2](#), [C5](#)LTMaint: [In-House](#)

Purchase Prob

Multi Locations: [Yes](#)

d Equip Pros:

Lease Exp:

- u1://electric counterbalance
- u2://reach or orderpicker
- u3://walkies
- u4://cushion
- u5://pumatic

Lookup window...



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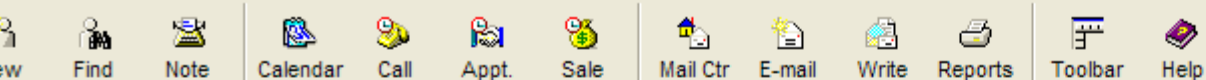
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 LT Territory: [B3](#)
 LT Prim Supp: [Crown](#)
 ITA Class: [C2, C5](#) LTMaint: [In-House](#)
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LT Equip Pros:
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LT CSR:

Jim
 Pete
 Sam

LT Territory: [B3](#)

LT Prim Supp: [Crown](#)

ITA Class: [C2](#), [C5](#)

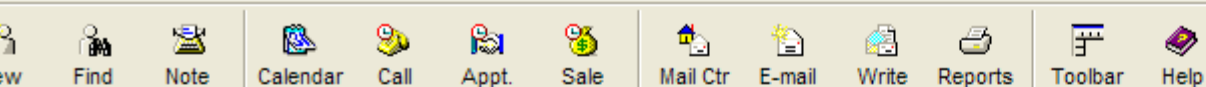
LT Maint: [In-House](#)

Purchase Prob

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Used Equip Pros:

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ITA Class: [C2, C5](#)

LT Prim Supp: [Crown](#)

LT Maint: [In-House](#)

- Cat
- Clark
- Crown**
- Hyster
- Mitsubishi
- Raymond
- Toyota
- Yale
- Lookup window...

Purchase Prob

Multi Locations: [Yes](#)

Used Equip Pros:

Lease Exp.:



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 Source: Asst:

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LT Maint: [In-House](#)

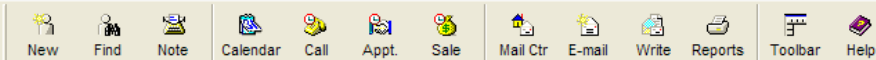
- Caterpillar
- Clark
- Crown
- In-House**
- Independent
- Nissan
- Raymond
- Yale
- Lookup window...

Purchase Prob

Multi Locations: [Yes](#)

Used Equip Pros:

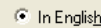
Lease Exp.:



To preview the members of a filter, click 'Search All.' Click 'Build Filter' to define further search criteria, then choose 'Drill Down' to apply these added conditions.



Fleet Size (Key2) Contains "LTb" AND LT Maint Supp (Umainlt)
Contains "In-House"



☒ In English
☐ In gBASE

American Seating Co
Columbian Dist Service Incorporated
GM Sales Training and Consulting
Haviland Products Co
K R C Incorporated
National Nail Corporation
Quality Stores Incorporated
Quality Stores Incorporated
Steelcase Incorporated
Zondervan Corporation

Richard Arnold
Bill Eckburg
Gerald Maywright
Richard Garner

Robert Point

Sarah Seams

James Schneider

Build Filter

Save

Search All

Drill Down

Count: 10

Coverage Philosophy

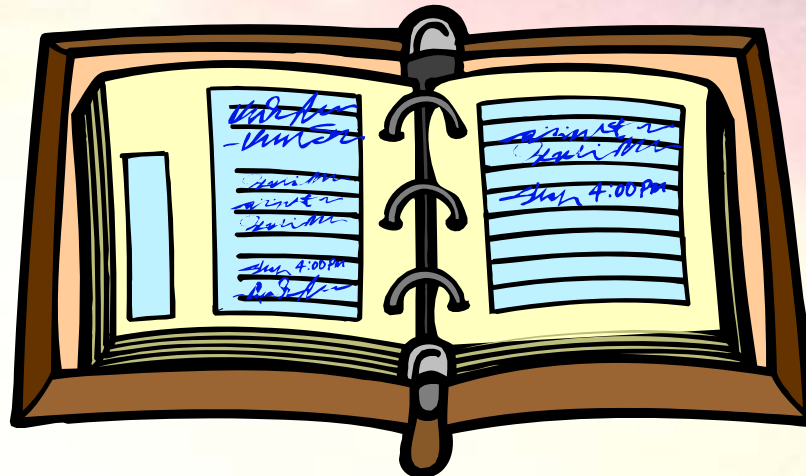
"New customers hear from Royal 17 times in the first three months of their relationship. These 'touches' range from handwritten thank-you notes from salespeople to proactive calls from the customer-service department to inquire if drivers have been courteous and helpful."

Bob Bergdoll Jr., Royal Office Forms; CEO and co-owner

As small-business owner, Royal has nearly 200 employees and operations in 11 cities - Bergdoll understands that sales to small companies require a little extra attention. Major corporations order directly from giant distributors or have accounts at Staples and Office Depot. Royal's 28,000 customers typically have fewer than 100 employees, and the "deciding factor" can be at any level of the customer's organization.

Coverage Philosophy

- Contact Management Program
- Top 100 Accounts
 - Call expectations
 - Parts Counter Touch-points
 - Thank you notes
- Binder-Based as Safety Net



Coverage Philosophy

- Contacts – Multiple
- Account Plan
- Fleet Information
- Lease and Maintenance Data
- Conversation Notes
- Next Steps

Coverage Philosophy

Outcomes

- Improved quality of calls
- Expectations established for behaviors
- Enhanced value of the enterprise
- More “at bats” with better “on base percentage”