

TERRITORY AND QUOTA MANAGEMENT

TQM OVERVIEW

Obero SPM Territory and Quota Management (TQM) provides organizations with a dynamic and intuitive solution to model, administer and analyze their account and territory assignments and quota plans.

Key benefits of implementing Obero SPM

Territory and Quota Management include:

- Increased sales potential by optimizing territory coverage and alignment.
- Increased sales team motivation by aligning quotas with market penetration and potential.
- Improved customer satisfaction by better managing account assignments.



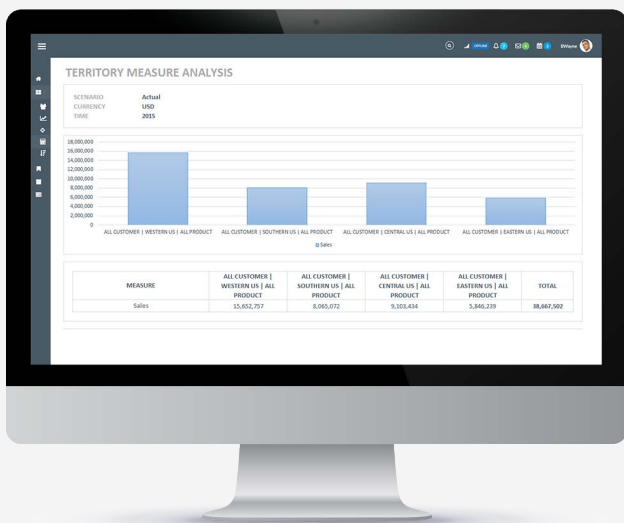
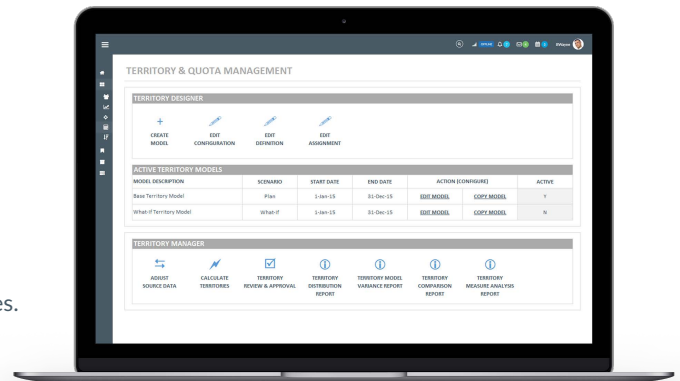
OBERO SPM OVERVIEW

Obero SPM helps organizations streamline their Sales Planning, Execution and Optimization processes by providing the required tools to effectively manage sales performance. Its comprehensive functionality, which includes Sales and Revenue Management, Territory and Quota Management, Workforce Management, Incentive Compensation Management and Profitability Management, provides organizations with a solution that supports the end to end sales performance life cycle; automating processes for the Offices of Sales, HR and Finance.

See Obero SPM in action
oberospm.com/demo

TQM ADMINISTRATION

- Define territories based on any number of business hierarchies or logical rules.
- Logically group territory definitions based on position, role or account type, such as new or existing accounts.
- Assign people or groups of people to territory definitions and incorporate assignment types, such as primary and overlay.
- Derive quotas based on top-down methodologies for new account hunters or bottom-up methodologies for existing account farmers.
- Manage flexible quota proration, ramp and acceleration/deceleration rules.
- Dynamically generate and distribute territory assignment and quota detail documents based on configured components.
- Govern model administration with integrated workflow and process management.



TQM CALCULATIONS

- Automate, or execute on demand, calculations for individual models or all models.
- Base territory capacity calculations on any number of drivers, such as white space and market penetration rates and renewal and expansion rates.
- Determine CRM account, lead and opportunity assignments based on territories.
- Allocate and dynamically adjust quotas based on any data scenario, such as historical actuals, current forecast and future plan.
- Override system-calculated quotas with management adjustments.
- Ensure all changes to territory and quota configurations and assignments are time effective.
- Conduct what-if calculations based on any number of territory or quota configurations.

TQM REPORTING

- Leverage a library of pre-built territory and quota-related forms, reports and dashboards, including territory coverage, comparison and distribution reports and quota attainment reports.
- Create new forms, reports and dashboards in a drag-and-drop manner in Excel.
- Include detailed or summary level territory definition and assignments and quota data into forms, reports and dashboards.
- Manage access to forms and reports, and the underlying data, based on integrated security management.
- Access forms, reports and dashboards over the web, via any browser, tablet or mobile device.
- Export reports to Excel and PDF or print reports directly from the web.
- Package groups of reports and distribute them via email automatically.

