



Intelstream Territory Management Tool

Intelstream, Inc., leading providers of SugarCRM professional services and products is proud to offer SugarTerritory, a tool that provides sales managers accurate and timely territory mapping capabilities.

Why Territory Management?

- **It is fair.** Territory assignments allow an even distribution of leads and accounts for salespeople.
- **It saves money.** By utilizing an efficient territory management tool, there is no overlap in sales coverage and sales costs are greatly reduced.
- **It enhances customer service.** Customers are ensured adequate and evenly distributed servicing if they are divided into territorial categories.
- **It offers accurate performance evaluation-** Sales representatives can be measured on an equal basis according to territories through reporting tools.

SugarTerritory by Intelstream: Remarkable Capabilities

Visualization of all Territory Criteria through Google Maps Technology - Territory data is displayed on a map appearing on the dashboard. By interacting with the map, users can manually determine borders or utilize the Intelligent Equalizer to assign territories.

Plan Territories for Teams and Individual Sales Representatives - Extensive territory plans can be developed based on both teams and individual users.



TERRITORY MANAGER: HOME

[Enterprise Sales Team] [All Territories] [Midwest USA]

Territory:	Companies:	Sales Rep:
Illinois	262,326	Roger Arnold
Iowa	66,241	Roger Arnold
Indiana	117,942	Lewis Martin
Michigan	193,318	Lewis Martin
Minnesota	124,600	Roger Arnold
Missouri	125,287	Roger Arnold

Lead Assignment Automation - Utilizing the criteria defined above, the Territory Management Tool automatically assigns incoming leads to the appropriate sales representative and/or team. This allows even distribution and an efficient sales process.



Intelligent Equalizer Tool ensures balanced territory assignment. Sophisticated variables such as census data, total businesses, annual payroll, and key industry metrics are sorted according to county, state, and region.



TERRITORY MANAGER: EQUALIZER

[[Inside Sales Team](#)] [[Enterprise Sales Team](#)]

Sales Rep:	Balance:	Total Companies:	Annual Payroll:	Total Leads:
Roger Arnold	20%	654,245	540M	322
Sally Levin	11%	425,241	387M	328
Lewis Martin	29%	917,135	915M	318
Jonathan Archer	20%	654,245	615M	325
Lindsey Sampson	20%	724,548	725M	385

Territory reassignment. One thing is certain- organizations change with sales reps moving on and acquisitions taking place. In these scenarios it is often necessary to realign defined territories. The SugarTerritory functionality supports an agile configuration that puts territory administrators in the driver's seat and allows for seamless modifications that mirror changes in a company's organizational structure.

Get Started Immediately!

To see how SugarTerritory can be configured to enhance your business, contact us today.

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