

Visit tour planning for the sales force



More time for customers, less time on the road

► PTV integration in SAP CRM®

The possibilities at a glance:

- Optimized route planning thanks to the use of geo data
- Direct integration into the SAP CRM interface
- Visit tour planning with the touch of a button: route calculation, optimization of visit sequence, and visual display of the route
- Suggestion of alternative appointments along the route (corridor search)
- Transfer of the route to common navigation systems (e.g. PTV vehicle or fleet navigation)
- Strategic planning and optimization of sales and sales force areas

Sales force employees spend the majority of their time in a car on the road from one customer to the next one. The planning and coordination of appointments and routes also requires a lot of time that should actually be reserved for the customer.

The use of the PTV xServer components in SAP CRM and in the proven industry solution movento Construction Site Management allows sales force employees to optimize their visit tours with the touch of a button.

PTV xServer automatically calculates the shortest or fastest routes for the planned tour, takes account of additional customers/projects on the route, and displays the results on a digital map. This efficient support allows sales force employees to spend more time with their customers.

Plan and optimize visit tours with the touch of a button

The PTV components are integrated directly into the SAP CRM interface. This allows sales force employees to start tour planning with the touch of a button after selecting the addresses in SAP CRM. The result is a geographic display of the search results; on request, the optimal route can also be output, complete with directions. The tour planning can either be handled dynamically or in advance across a longer period of time. For the specification of the appointments, customer-specific particularities such as office hours and lunch breaks are taken into consideration by the system automatically.

Sales force employees even receive assistance from the system in case of schedule changes at short notice: in case of gaps in the schedule of appointments, additional customers are suggested whose offices are on the planned visit tour.

Strategic instrument for optimized sales force areas

In addition to the purely operative use for daily sales business, PTV and movento offer solutions for central strategic sales force planning. With the PTV Map&Market planning system, sales force employees can plan, simulate, and optimize sales areas.

Typical planning goals are the equal utilization of sales force employees, areas with comparable sales potential, and geographic compactness for short driving routes. The planning results are then taken over directly into the SAP CRM area management.

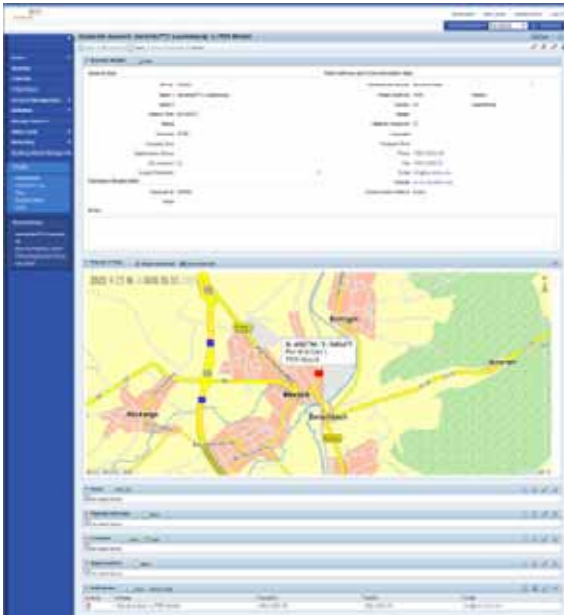


Fig.: Incorporation of the map view into SAP® CRM WebUI

- ▶ Display of special goals using the area search (hotels, restaurants, etc.)
- ▶ Simulation and strategic planning of area divisions with PTV Map&Market

Your advantages:

- ▶ Cost and time savings for the sales force due to the reduction of travel and visit costs and the reduction of the distances driven.
- ▶ More time for customers and more visits per day
- ▶ Increased flexibility in case appointments are rescheduled.
- ▶ Investment protection: solution can also be used with SAP extensions
- ▶ Easy to use from the SAP CRM interface
- ▶ Optimized sales and sales force areas for more transparency, optimal utilization, and more time for customers

These functions are available to you:

- ▶ Geo coding: conversion of the addresses stored in SAP CRM into geo coordinates.
- ▶ Automatic visit planning and specification of the optimal visit week and sequence for any time period with output of detailed visit tour plans.
- ▶ Consideration of the duration of visits, working hours, fixed appointments, overnight stays.
- ▶ Consideration of customer-specific details (visit frequency, office hours, priorities, etc.).
- ▶ Optimized route calculation, output of directions.
- ▶ Display of the route as a map with detailed directions or possible connection to a smart phone or navigation system.
- ▶ Corridor search in case of gaps in the appointment calendar: suggestion of additional customers who are located along the already-planned visit tour.

About PTV

PTV AG has been a leading provider of software and consulting services in the digital geography, transport, and traffic planning sector since 1979. Established brand names, public authorities, and commercial enterprises rely on PTV AG's planning and analysis tools for location planning, sales, and sales force control. This company active around the world is headquartered in Karlsruhe.

About movento

The technology comes from SAP. movento brings it to life.

For many years, movento has been a SAP Service Partner with expertise in the areas of customer relationship management (CRM), Web Channel, Enterprise Mobility, and Business Intelligence (BI). The company's spectrum of services includes strategic management and process consulting as well as complete implementation of business processes with SAP Business Suite and SAP NetWeaver. Its clients include international companies as well as specialized and dynamic medium-sized companies.

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