

Optimising Territory workload

The Territory Optimiser can be used to identify how many field Territories you need to service your market and to create balanced Territories in terms of workload, whilst minimising travelling time, to create the most efficient Territory structure. The following instructions will give you a step by step guide on how to create optimal Territories in SKiN, with the additional option of using existing resource locations as the territory bases if available.

Before you begin

Before you start creating optimal Territories, make sure that you have your visit and resource location data set up as Map Pins layers in a saved project. If you would like to compare the optimised Territories with your existing Territories, you will also need to make sure that you have set these up as a Territories layer in your project. If you need assistance getting the data into SKiN please refer to the following sections:

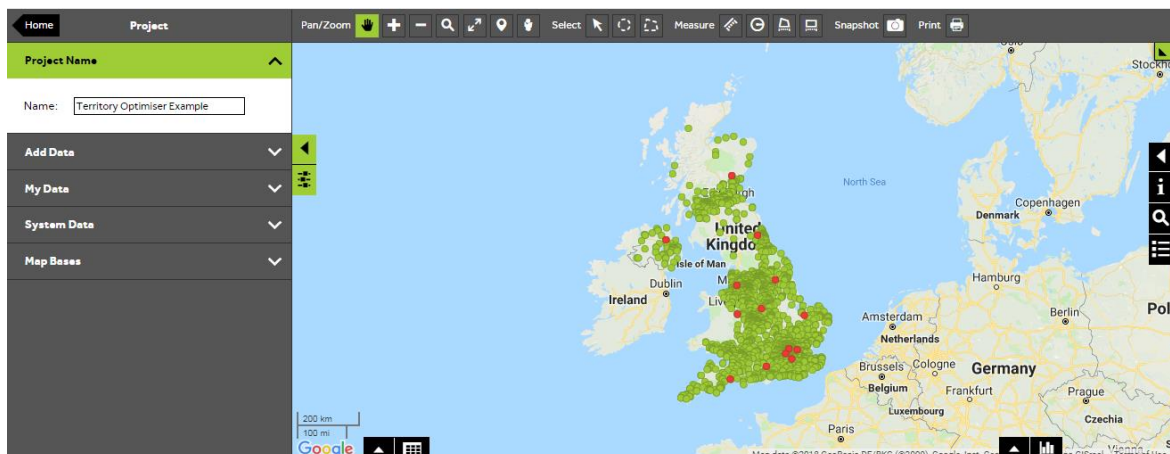


- Territories Steps - Create Project
- Territories Steps - Import Data
- Map Pins Steps - Import Data



Create new layer

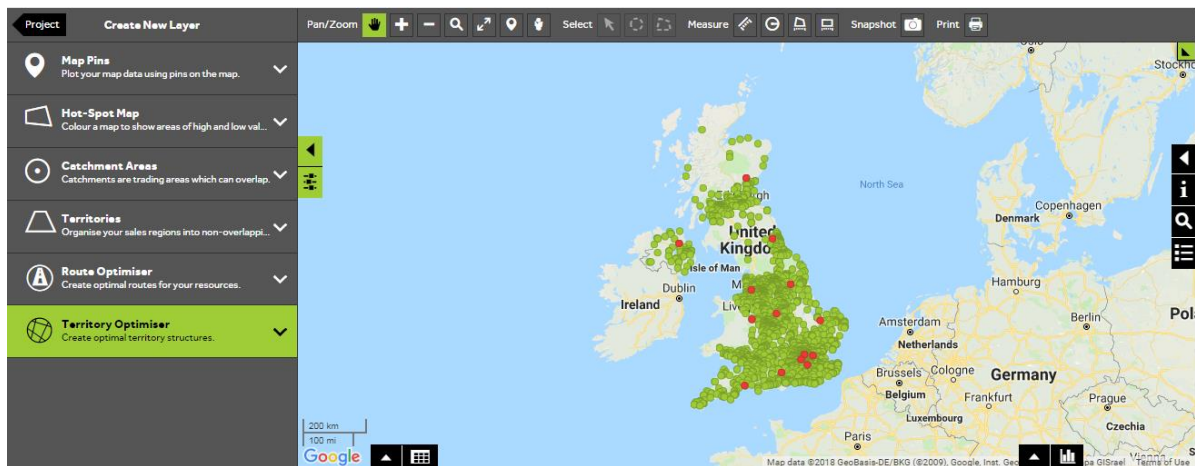
- To create optimised Territories, **Open an existing project** that contains the visit layer and resource location layer that you would like to base the optimisation on and then choose **Add Data, Create New Layer**.



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Choose which type of layer to create

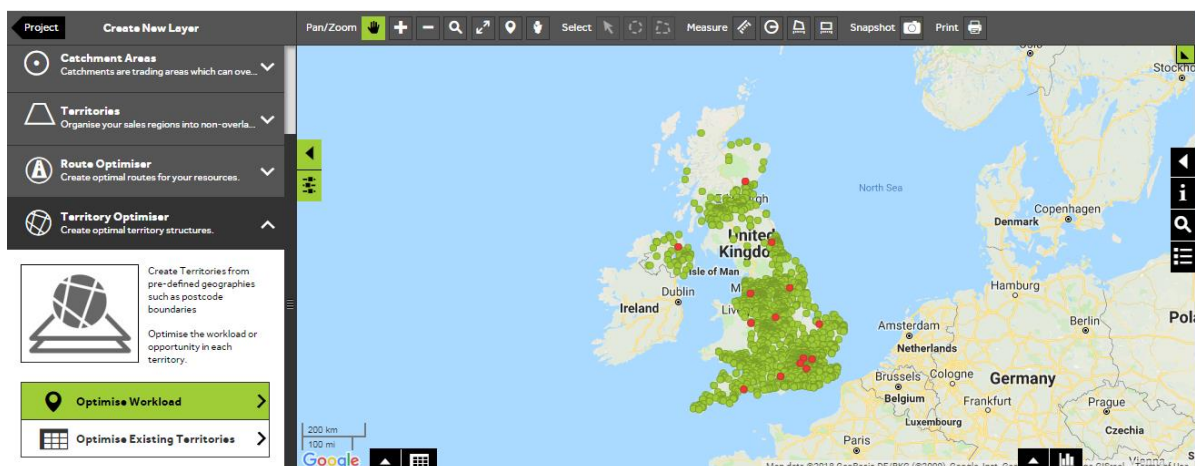
- Select **Territory Optimiser** to create an optimal Territory structure.



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Choose to Optimise Workload

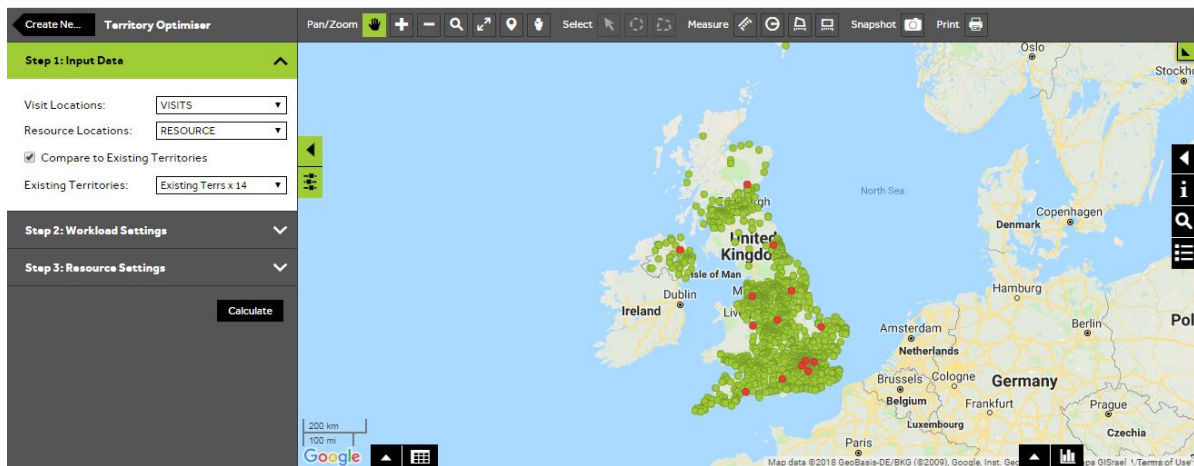
- Select **Optimise Workload** to create optimal Territories based on your customer location data and existing resource. An alternative option **Optimise Existing Territories** is available if you want to create optimal Territories based on an existing Territory layer in your project.



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Select the input data

- In the **Territory Optimiser** panel select the input data and settings for your Territory optimisation. In the **Step 1: Input Data** section select which visit locations Map Pins layer and resource location Map Pins layer from your project you would like to base the optimisation on, by clicking on the dropdown lists next to **Visit Locations** and **Resource Locations**.
- The tick box next to **Compare to Existing Territories** gives you the option to compare the optimised Territories to your existing Territories. If required, tick the box and then select the Territory layer by clicking on the dropdown list next to **Existing Territories**.



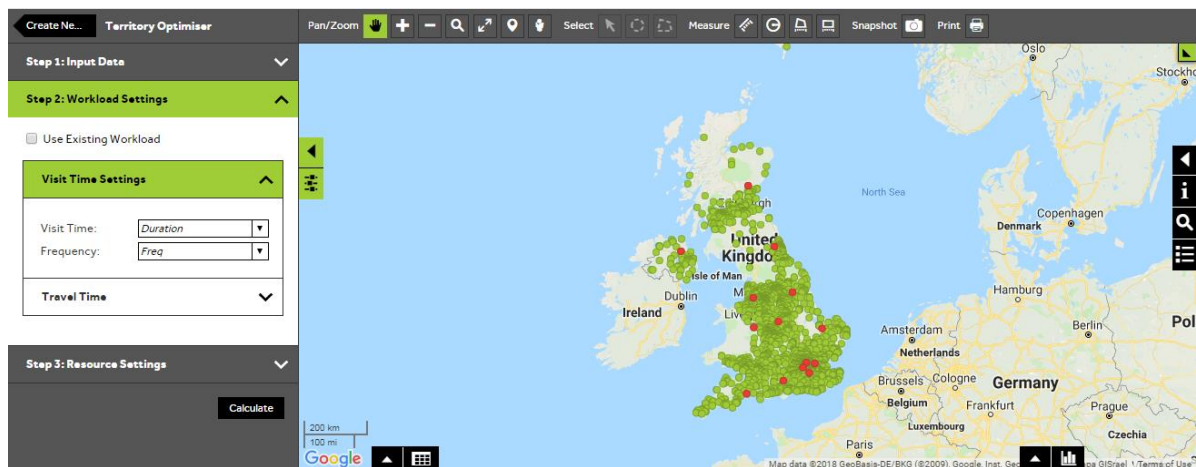
Select the workload settings

- In **Step 2: Workload Settings** you can choose how to define the workload for your Territory optimisation. There are a few different options for defining the workload depending on the data that you have:

Ticking **Use Existing Workload** allows you to select a column from your visit locations layer that contains all the workload associated with the visit. Select the column from the dropdown list next to **Workload**.

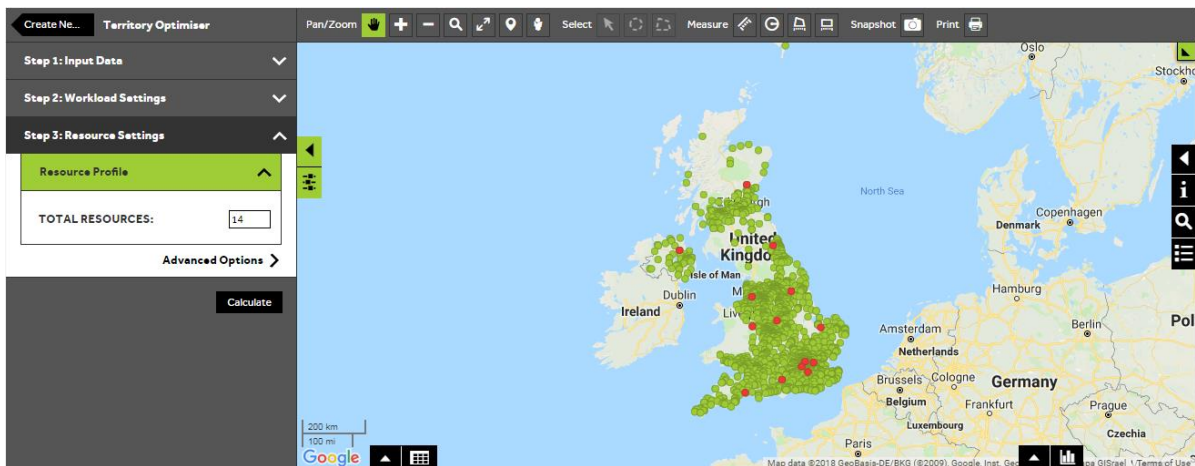
Visit Time Settings allows you to select a visit duration and frequency by either selecting a column from your visit locations layer or by entering a global value for all the visits into the box next to **Visit Time** and **Frequency**.

- When **Use Existing Workload** is unticked **Travel Time Settings** can be applied to factor in the impact of increased traffic at certain times of the day. To suppress the travel time for any of the three times of day, increase the percentage by typing a value into the percentage box.



Choose resource settings

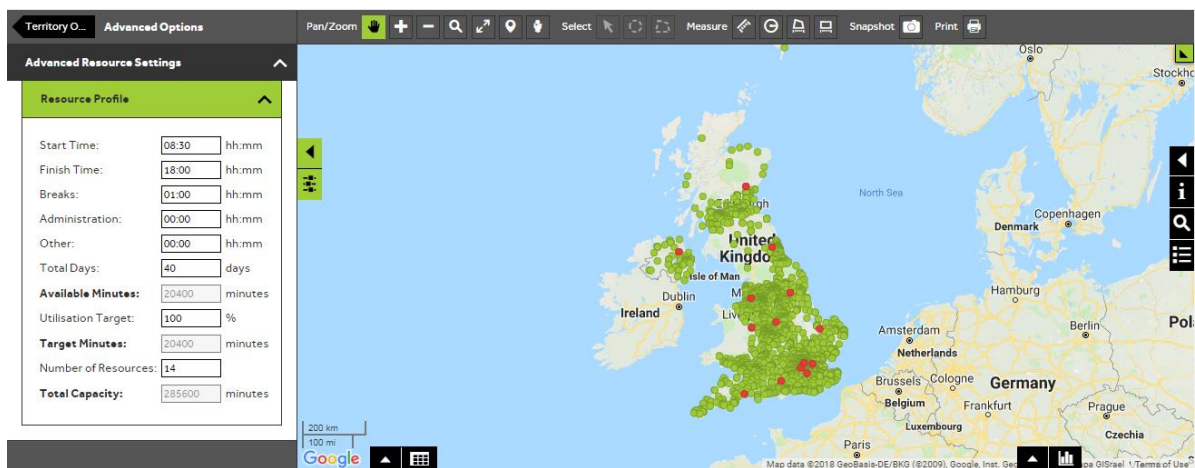
- In **Step 3: Resource Settings** you can specify the total number of resources (reps) that you currently have. You can overwrite this value to try different scenarios by typing a new number into the box or by using the up/down arrows which become visible when you hover the mouse over the number box.
- Select **Advanced Options** if you want to specify further resource settings.



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Choose further resource settings

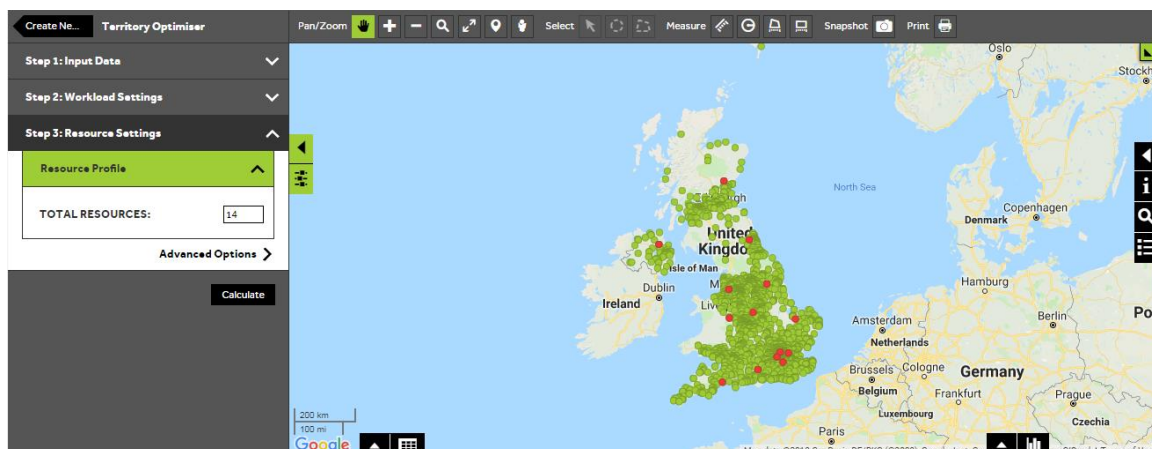
- The **Advanced Resource Settings** panel allows you to specify parameters for all of the resources.
- To return to the main Territory Optimiser panel when you are happy with your settings press the **Territory Optimiser back arrow** at the top of the panel.



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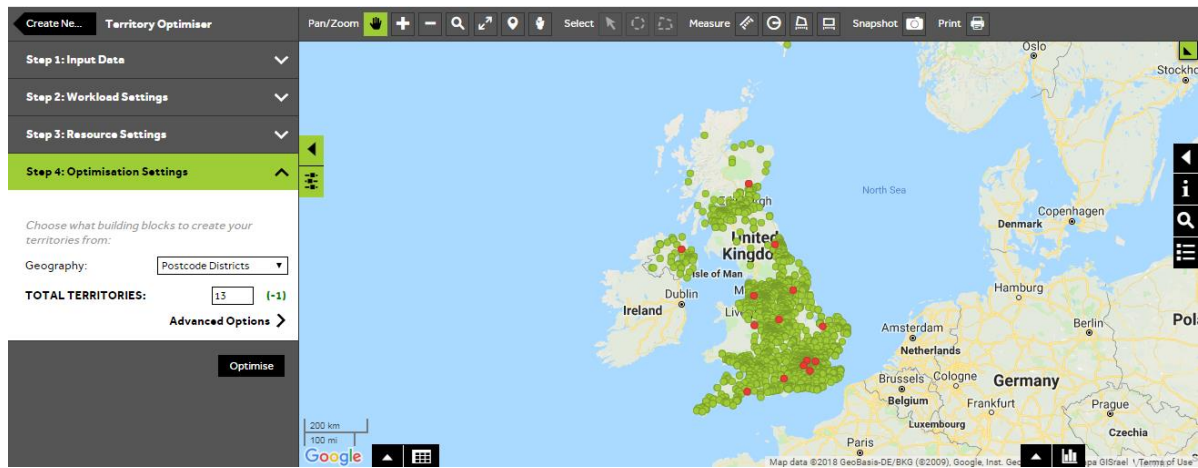
Calculate the number of resources required

- Press **Calculate** to calculate the number of territories required to service the visits, with the visit and resource settings that have been applied.



Select optimisation settings

- If you did not select to **Compare to Existing Territories**, then you will need to choose a **Geography** for your Territories such as Postcode Districts.
- The **Total Territories** that the system has calculated to cover the workload is shown in **Step 4: Optimisation Settings**. You can overwrite this number by typing a new number of territories into the box.
- To access additional settings for the territory optimisation, click on **Advanced Options**.



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Change advanced optimisation settings

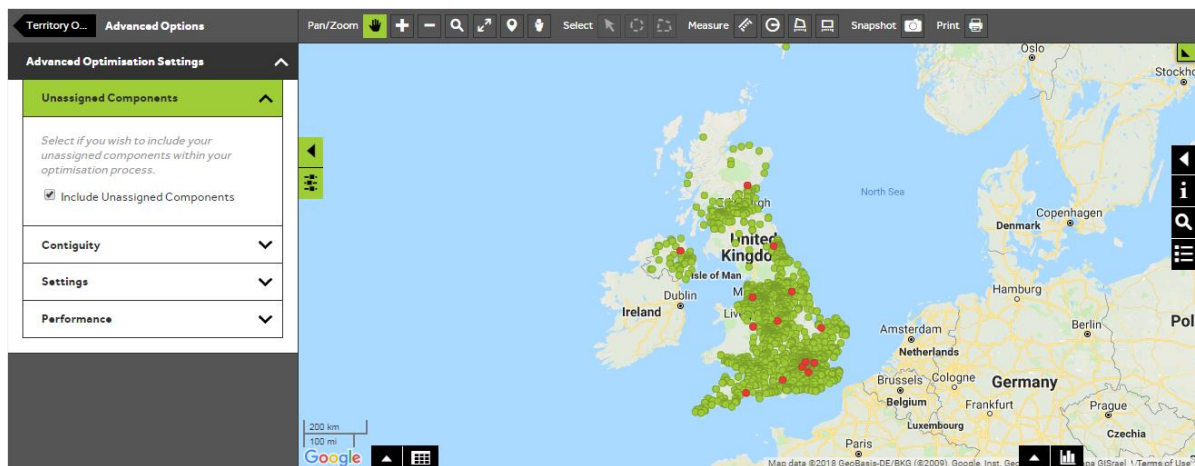
- In **Advanced Optimisation Settings** you can change various default settings if required:

Include Unassigned Components – If ticked this will include any building blocks that aren't covered by your input data so all building bricks are allocated to a Territory,

Contiguity – If ticked this ensures that Territories are one unit and are not split into several areas.

Settings – Allows you to **Fix** Territory locations so that a Territory will be built around a similar location to existing Territories if available. You can also **Lock** Territories so that they will be identical to the existing Territory and you can set individual workload targets for Territories.

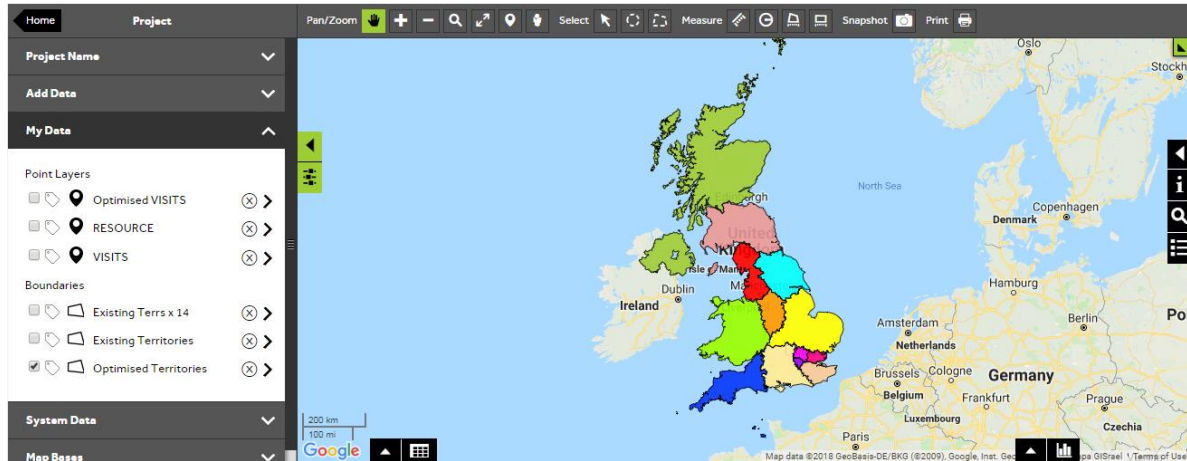
- Return to the main Territory Optimiser panel by pressing the **Territory Optimiser back arrow** at the top of the panel and if you are happy with your settings, press the **Optimise** button to start the optimisation process.



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View the optimised Territories

- Once the processing has completed, the map will update to show the optimised Territories. You can then click on the **Optimised Territories** name in the **My Data** section of the panel to make changes to the size or style of the territories.



What do you want to do next?

You may wish to view the balance of your Territories, add or remove components from your Territories or you may wish to export your Territories to a file. Please refer to the following sections for further assistance:

- Refer to: **Territories Steps – Balance Territories**
- Refer to: **Territories Steps – Add or Remove Components**
- Refer to: **Territories Steps – Create Output - Export**
- Contact: **Geoplan Support**