

Route Optimization Framework (Sales RTM)

A comprehensive approach to optimize sales routes, increase efficiency, and reduce costs through data-driven territory design and route planning.



WHAT WE SOLVE

Route to Market Excellence

Our comprehensive approach optimizes sales routes, increases efficiency, and reduces costs through data-driven territory design and intelligent route planning.



Market Coverage

Ensures optimal reach across target segments with strategic territory design



Cost Efficiency

Maximizes resource utilization while minimizing transportation expenses



Customer Engagement

Creates meaningful touchpoints throughout the buyer journey with optimal frequency

Why Route Optimization Matters

28–31%



Time Actually Selling

Sales reps spend only 28–31% of their time actually selling to customers. Inefficient routes waste precious selling opportunities.

25–40%



More Customer Visits

Optimized routes minimize travel time and fuel costs, enabling 25–40% more customer visits per day.

20%



Cost Reduction

Results in higher sales productivity, improved customer satisfaction, and reduced operational expenses by up to 20%.

The Problem We Solve

Fragmented Territories

Overlapping routes, missed time windows, and inefficient coverage patterns

Excessive Windshield Time

Reps spend too much time driving between accounts with inconsistent call cadence

High Cost-to-Serve

Elevated operational costs with limited visibility into ROI by customer segment

Limited Adaptability

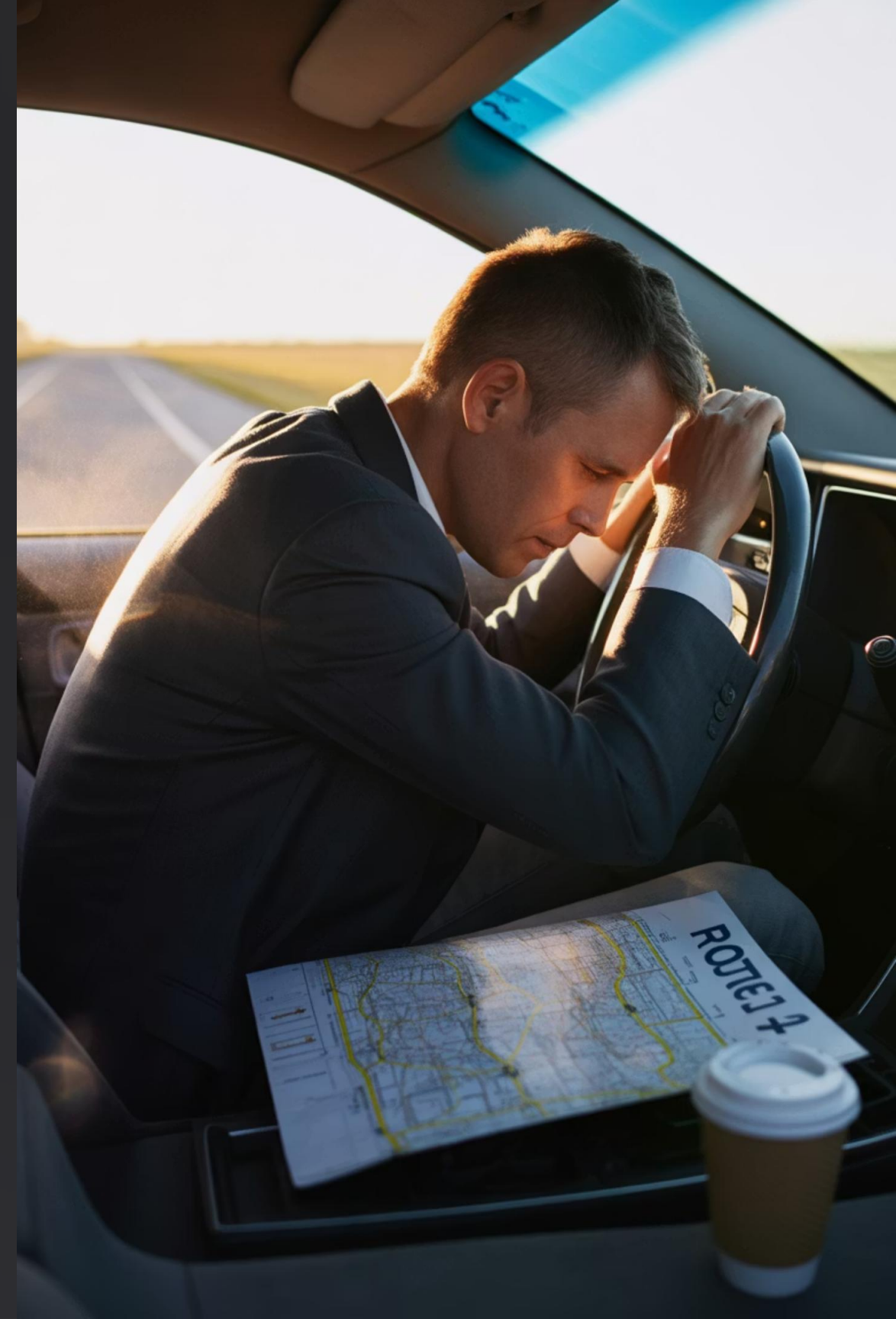
Difficult to pivot for promotions, resets, and seasonal demands

Inconsistency Services

Key customers with high nonservices visits

High OOS Levels

Lost of sales due lack of best sellers



Core Components of a Route Optimization Framework

Customer Segmentation & Prioritization

Group customers based on value, potential, and buying behavior. Align visit frequency with customer priority to maximize ROI.

- ABC analysis for customer prioritization
- Geographic clustering for efficient coverage

Channel & Outlet Selection

Identify optimal mix of direct sales, distributors, and digital channels to reach target customers efficiently.

- Channel economics assessment
- Outlet profitability analysis

Route Planning & Scheduling

Use algorithms and real-time data to design efficient daily routes that maximize selling time.

- Multi-stop optimization algorithms
- Time-window constraints management

Performance Monitoring

Track key metrics to continuously improve route efficiency and sales effectiveness.

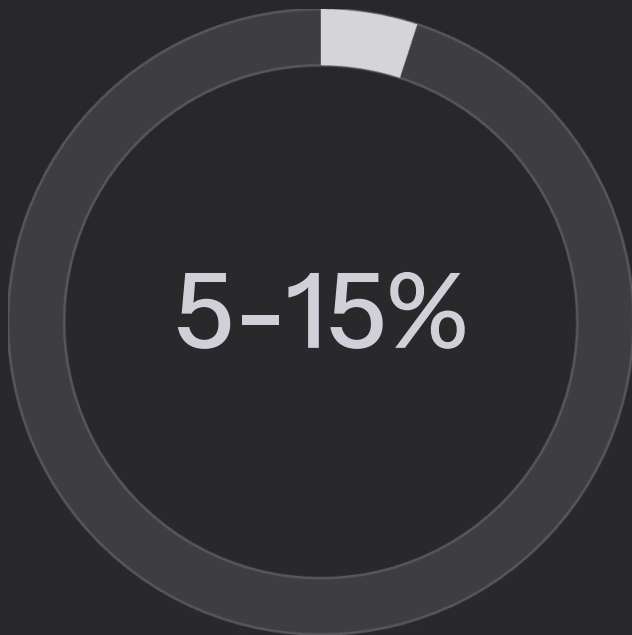
- Sales rep activity tracking
- Distributor performance measurement

Outcomes You Can Expect



Reduced Miles

Cut miles and windshield time by 10-25% through optimized routing and territory design



More Selling Time

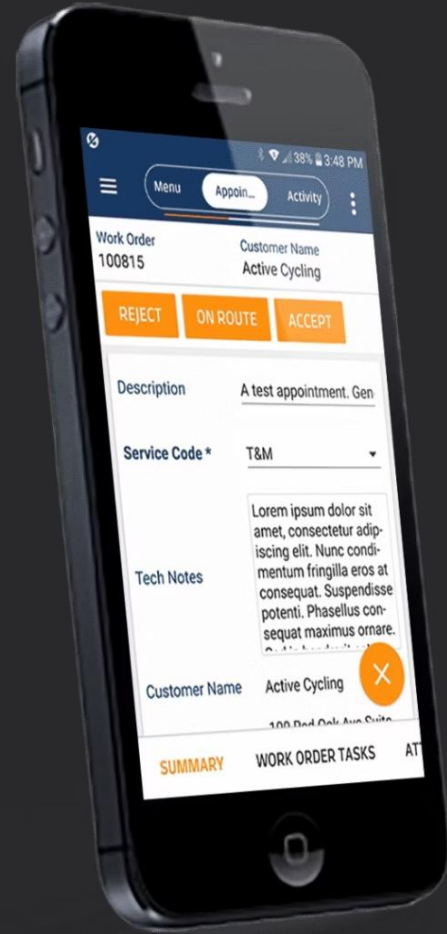
Lift selling time by 5-15%, enabling more calls per rep per day



Lower Cost-to-Serve

Increase drop density and lower cost-to-serve per stop by up to 20%

Why Campodata



Modern route optimization solutions transform sales operations by integrating multiple data sources:

- GPS and mapping technologies for accurate location data
- CRM integration for customer prioritization
- Historical visit data to improve prediction models
- Real-time traffic information for dynamic routing
- Customer time windows and preferences

These systems enable **multi-stop route planning**, handle complex **time window constraints**, and provide **dynamic re-routing** capabilities when conditions change.

Mobile access empowers sales teams with real-time updates and performance dashboards.

Our 8-Step Method



1. Data Hygiene & Geocoding

Clean customer data and map to precise locations



2. Segmentation & Service Policy

Define customer tiers and appropriate visit frequency



3. Territory Design

Balance workloads across geographic regions



4. Route Optimization Engine

Deploy sophisticated algorithms for optimal routes



5. Scenario Modeling & ROI

Test what-if scenarios to maximize returns



6. Pilot & A/B Testing

Validate against business-as-usual metrics



7. Rollout & Training

Implement with comprehensive change management



8. Governance & Re-optimization

Establish ongoing improvement cycle

Data We Need

Account Information

- Account master (IDs, addresses, geos)
- Historic visits/orders (12–24 mo)
- Time-on-task by outlet
- Store hours/time windows

Strategic Elements

- Territory boundaries (if any)
- SLA targets
- Broker/wholesale coverage

Operations Data

- Rep home bases/depots
- Fleet type/capacity
- Service policies by segment (A/B/C)
- Calendars/blackout days



Key Deliverables



Balanced Territories

Before/after comparison and balance report showing optimized territories



Weekly Calendars

Structured visit schedules by segment and region to ensure consistent coverage



Optimized Routes

Detailed stop order, ETA/ETD, dwell time predictions, and route books



KPI Dashboard

Visualizations comparing baseline vs. optimized performance



Integration Kit

CSV/API interfaces for your CRM/SFA systems and telematics

Route Optimization Analysis



Timeline (typical)



Week 1–2

Data intake, cleanse, geocode, baseline



Week 3–4

Segmentation, service policy, preliminary territories



Week 5–6

Route engine build, scenario runs, shortlist plan



Week 7–8

Pilot deployment & A/B measurement



Week 9–10

Iterate, finalize, training, rollout kit

Future Services in Sales Route Optimization



AI & Machine Learning

Advanced algorithms will enhance predictive route planning and customer targeting, continuously learning from outcomes to improve recommendations.



Real-Time Adaptability

Increased use of traffic, weather, and environmental data to optimize routes dynamically throughout the day, responding to changing conditions.



End-to-End Integration

Seamless connection with broader digital RTM platforms for comprehensive sales and distribution management across the entire value chain.



KPIs we'll commit to track



Cost Metrics

- Cost-to-serve per stop
- Miles/stop & miles/case
- OT hours
- Carbon per mile



Productivity Metrics

- Calls/rep/day
- Visit compliance & on-time %
- Average dwell time
- Drop size & strike rate

These key performance indicators will be continuously monitored to ensure optimization goals are being met and to identify opportunities for further improvement.

Change Management That Sticks



Clear Service Policy Matrix

Comprehensive playbook defining service levels and expectations for each customer segment



Leader & Rep Training

Hands-on training with mobile workflows to ensure adoption and proper implementation



Exception Management

Clear exception codes with fast re-plan rules to handle unexpected situations



Aligned Incentives

Compensation structure aligned to on-time service and coverage, not just sales volume

Ready to Optimize Your Route to Market?

Transform your sales operations with data-driven route optimization

Maximize Productivity

Intelligent time and resource allocation to boost sales performance

Reduce Costs

Lower expenses across fuel, maintenance, and operations

Enhance Customer Experience

Consistent, well-timed engagement that builds relationships

