

How to create Territories using the Create and Update Wizard in Market Insight

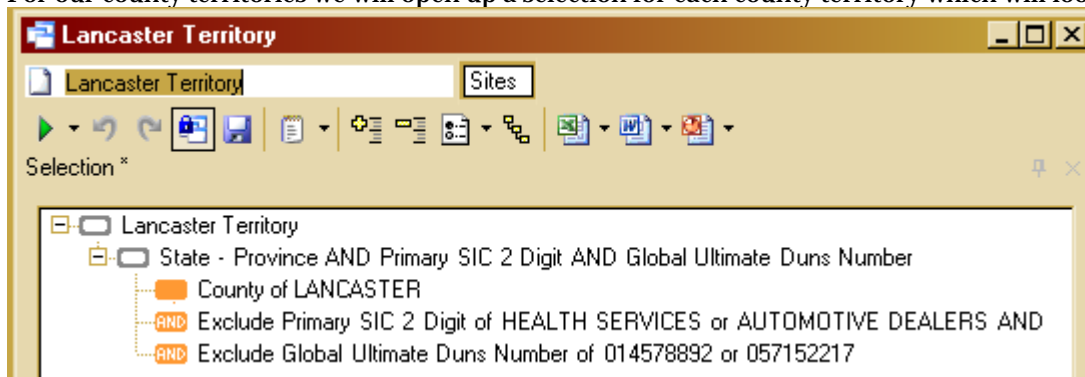


Decide with Confidence

There are times when your territories are not static, but you need a way to view and analyze your territories....how many customers ...how many prospects....do we need to adjust our territories? Through the use of the Create and update wizard you will be able to add multiple territories as a selector (drop down selection).

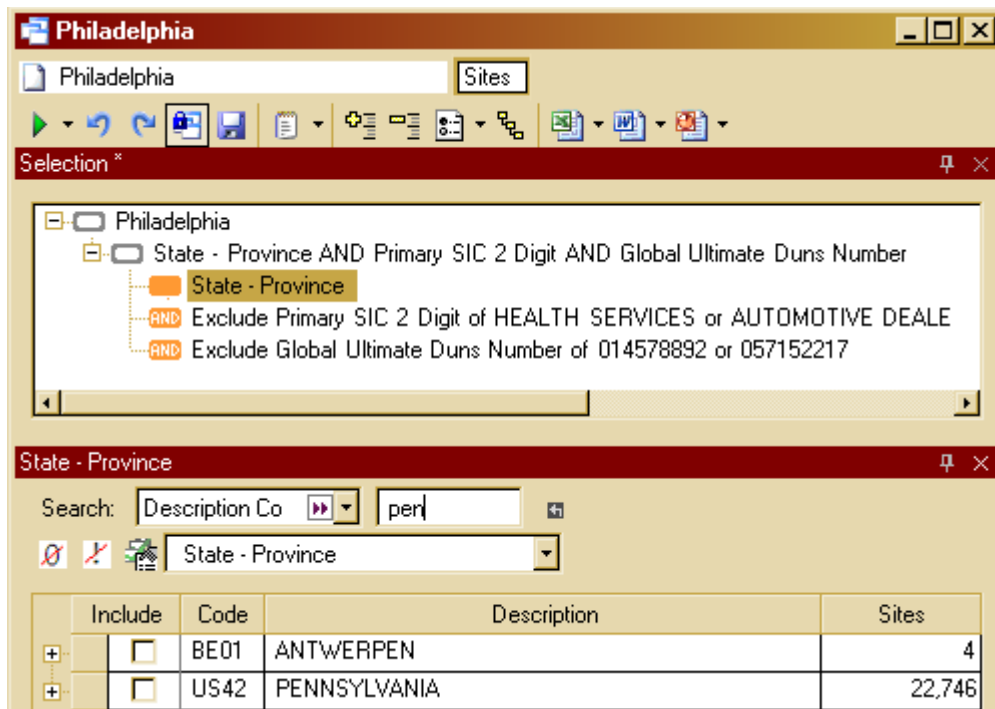
In this example you have territories that are county based, vertical views and by national accounts and your footprint is in the state of Pennsylvania. We do not want to see any overlap between the counties, the verticals and national accounts. We also do not want to see any overlap between the verticals and the national accounts. The national accounts will contain all family members for a set of accounts regardless of county and vertical. For example for the county territories we want to exclude the vertical territories and any of the national accounts. For our Vertical territories want to exclude the National accounts. The national accounts contain everything. The key here is that for our verticals and our national accounts, we only want them to be in Pennsylvania.

For our county territories we will open up a selection for each county territory which will look as follows:



To create the above selection we will need to complete our first county, which is Lancaster County. From our system explorer we will drag and drop into our selection State - Province, and because Lancaster County is in Pennsylvania, you will open the + sign next to Pennsylvania and select Lancaster. It is possible that the county that you are looking for could actually be in several states. To make sure you are looking at the county that you want to you will need to follow this process.

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Note, once you have selected Lancaster, you will see the  **State - Province** in the initial selection will change to  **County of LANCASTER**, see the final example below:

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Philadelphia

Philadelphia Sites

Selection *

Philadelphia

- State - Province AND Primary SIC 2 Digit AND Global Ultimate Duns Number
 - County of LANCASTER
 - AND Exclude Primary SIC 2 Digit of HEALTH SERVICES or AUTOMOTIVE DEALER
 - AND Exclude Global Ultimate Duns Number of 014578892 or 057152217

State - Province

Search: Description Co pen

State - Province

Include	Code	Description	Sites
<input checked="" type="checkbox"/>	US42071	LANCASTER	938

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The next thing that we want to do is to drag our verticals into our selection. From our system explorer drag and drop Primary SIC 2 Digit into our selection. Now we will want to select our verticals which are checked off in the selection below and we want to make sure that we selected Exclude.

The screenshot shows the 'Selection' window in Market Insight. It displays a tree view of the selection hierarchy. The 'Primary SIC 2 Digit' window is open, showing a search for 'Description Co' and a list of verticals. The 'Exclude' dropdown is set to 'Exclude'. The table below shows the selected verticals and their site counts.

Exclude	Code	Description	Sites
<input checked="" type="checkbox"/>	54	FOOD STORES	12,546
<input checked="" type="checkbox"/>	55	AUTOMOTIVE DEALERS AND GASOLINE SERVICE S...	14,683
<input checked="" type="checkbox"/>	80	HEALTH SERVICES	29,203
<input checked="" type="checkbox"/>	82	EDUCATIONAL SERVICES	10,363
<input type="checkbox"/>	!	Unclassified	1
<input type="checkbox"/>	01	AGRICULTURAL PRODUCTION - CROPS	10,201

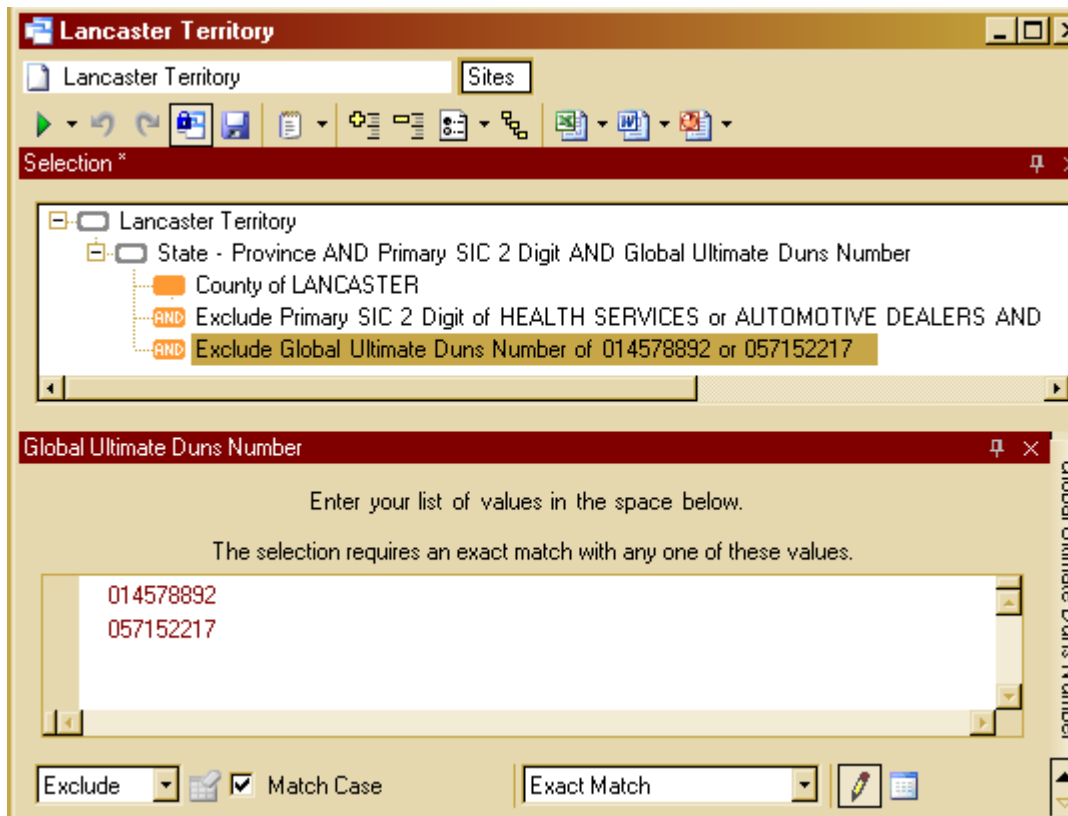
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Now we want to exclude the family members of our National Accounts, for this example we have two that we will be using, Rite Aide and Sunoco.

From our system explorer drag and drop Global Ultimate Duns Number and in the lower window we will add the Global Ultimate DUNS Numbers for Rite Aide and Sunoco. By using the Global Ultimate Duns Number we are bring

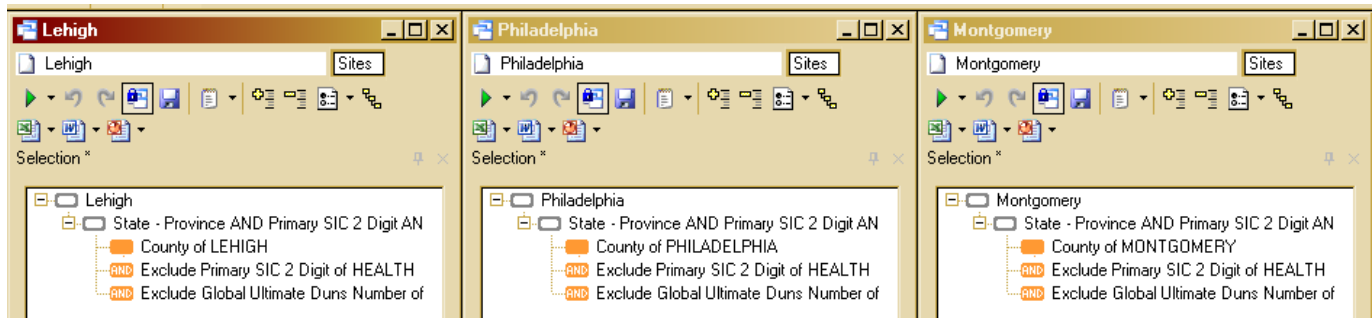
in all the family members but we also want to click on Exclude. Save your selection by naming it something that will correspond to your territory. In this example we named the selection as Lancaster Territory and it will as follows:



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We need to create a total of four counties selection including the one above. We used the one that we just created as a template, copied the selection 3 times into our workspace, renamed it and changed the counties, the remaining three will look as follows:




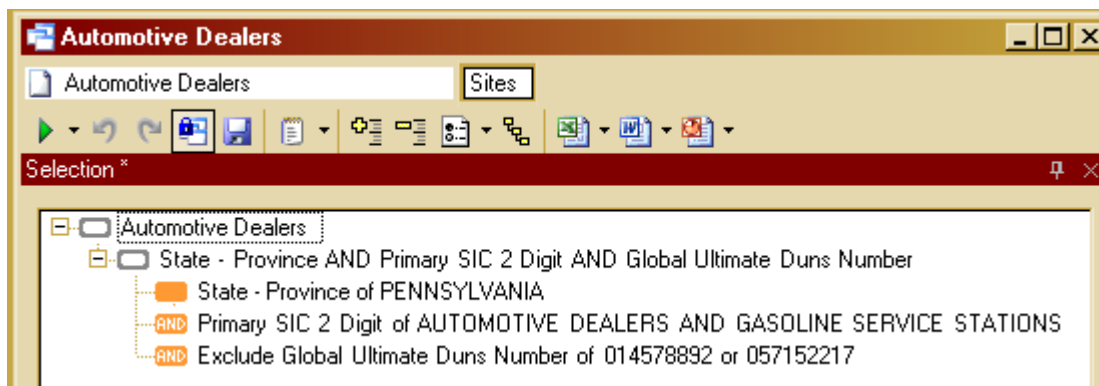
We will want to minimize these selections as we will be using them later in our create and update wizard.


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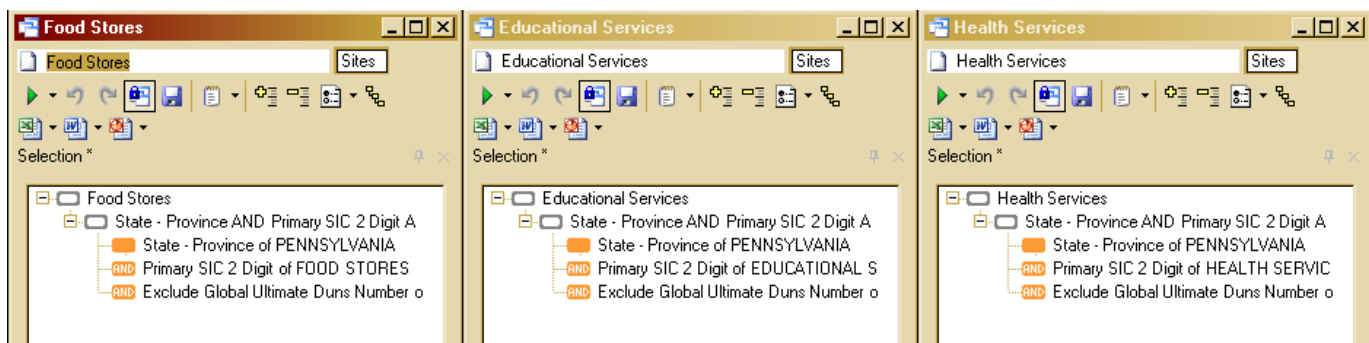


The next selections that we want to create will be our verticals and in this example we will want to include records that are in verticals but within the state of Pennsylvania and exclude the national accounts.

We will use one of our templates from above, copy it, rename it and we will need to right click on county and select delete. Drag from our system explorer  State - Province into the selection and select Pennsylvania. You will also change your SIC to the vertical that you are looking for, in this example we are using the Automotive vertical so using our template we unchecked the verticals that we were not using. Save your selection by naming it something that will correspond to your territory. In this example we are calling it Automotive Dealers. Your selection will look as follows:



For the remaining verticals we have Health Services, Food Services and Educational Services. The above selection will be your template, create a copy of the above selection, by dragging the selection, click on  and drag to your work area. Rename this new one to Health Services and change your SIC to reflect health services. Do the same thing to create educational services and change your SIC to reflect educational services. You will now have created the following selections.



We will want to minimize these selections as we will be using them later in our create and update wizard.

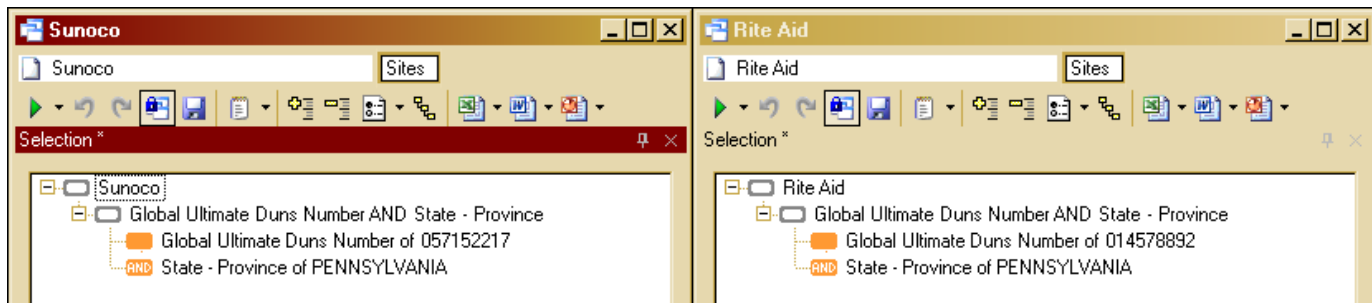
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The last territory that we need to create is our National Accounts. We will be creating 2, one for Rite Aide and the other one for Sunoco.

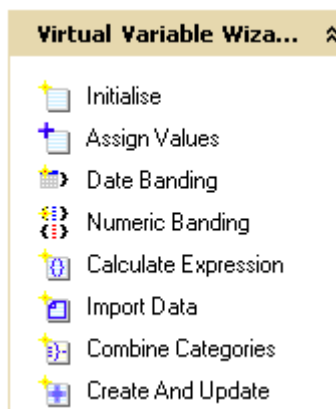
We can use one of the selections above as a template. What we be to right click and delete the Primary SIC 2 Digit. We will want to change the Exclude Global Ultimate Duns Number of 014578892 or 057152217 to include BUT we are only going to keep only one Global Ultimate DUNS Number. You can make a copy of the selection with both Global Ultimates, delete the opposite from each and name your selections.

For example:



All of the selections have been created so next we will use the create and update wizard to create our territory selector.

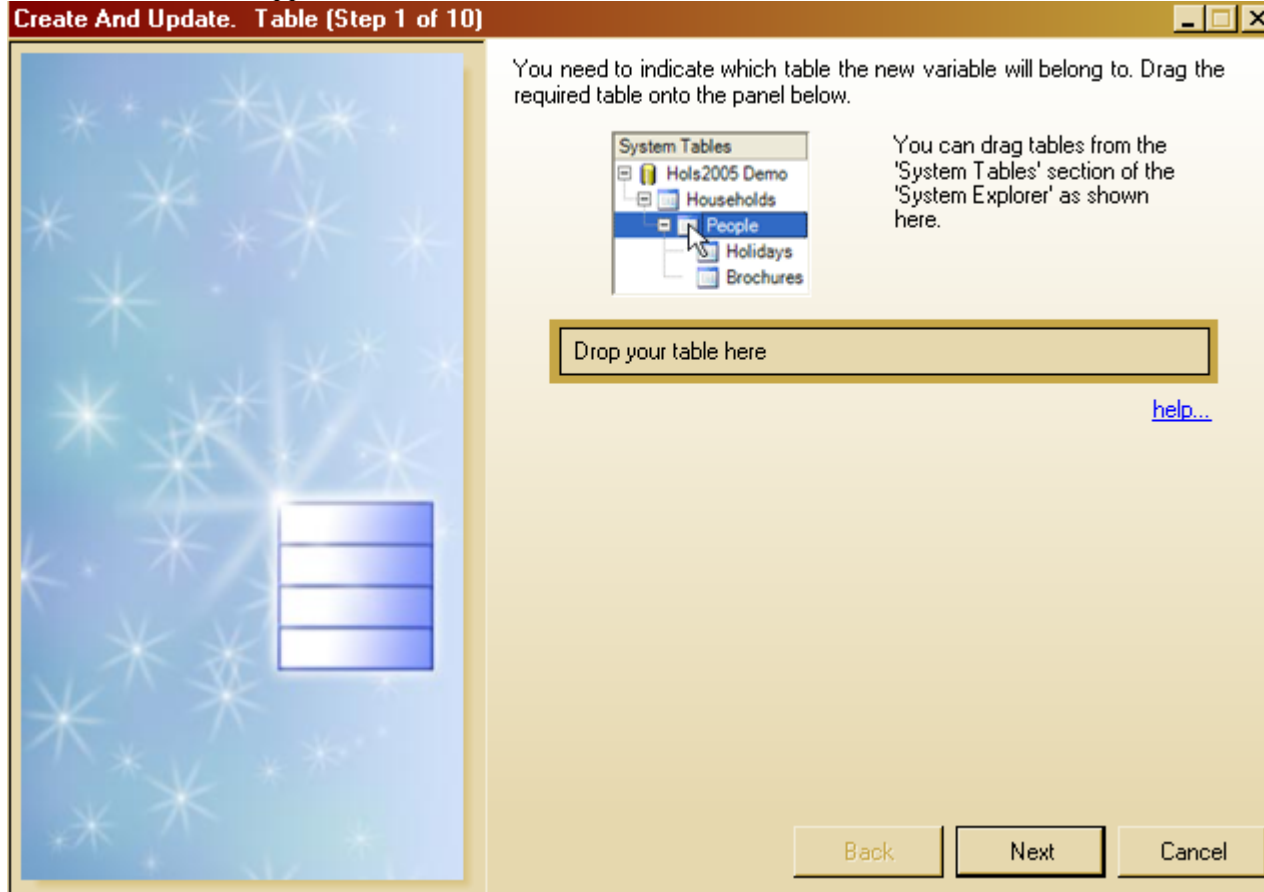
Click on your **Wizards** tab on the lower right hand side of your screen. Scroll down to Virtual Variable Wizards and click on **Create And Update**.



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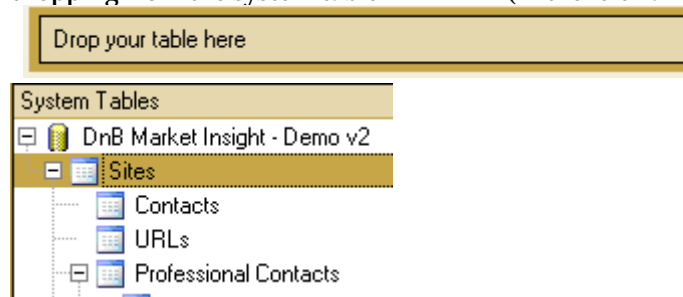
Your next screen will appear as follows:



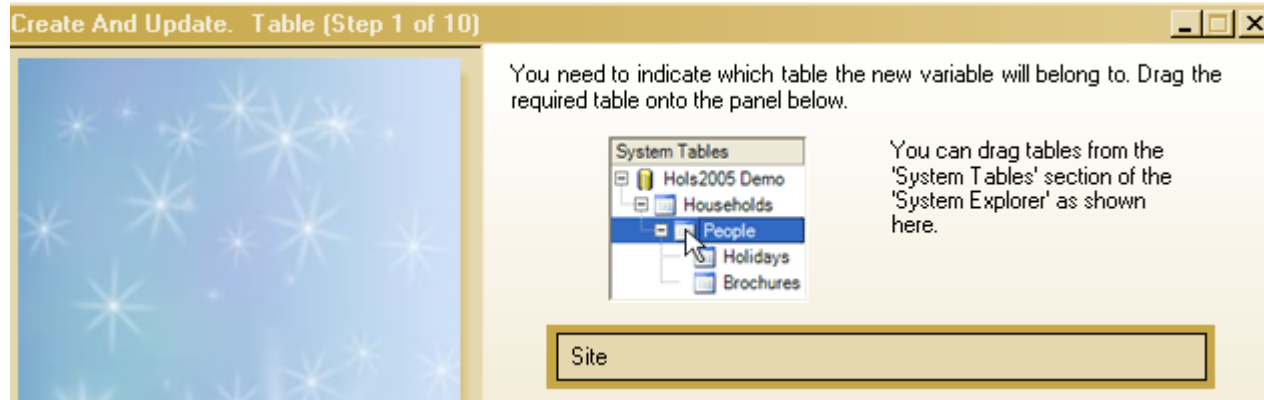
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At this screen, where it says  you will be dragging and dropping from the system table  (in the left hand side of your Market Insight into



Your screen will look as follows:



Click .

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At the screen below, leave everything as is and click on

Next

Create And Update. Type (Step 2 of 10)

Select the type of variable you wish to create from the choices below:

☒ **Selector**
A selector variable contains categorical codes e.g. postal district, age band etc..

☐ **Flag Array**
A flag array is used to represent a multiple choice such as 'newspapers read'.

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At this screen, we will be changing the number of categories to the number of territories that we have which is 10 and will leave the sequence as is:

Create And Update. Selector (Step 3 of 10)

Select the number of categories that will be included in your new variable.

Categories:

NOTE: An unclassified code will also be created as well as the above number of categories.

You can define the sequence of these categories below. If they have no particular sequence, use 'Nominal'

Sequence:

[help...](#)

Screen with changes:

Create And Update. Selector (Step 3 of 10)

Select the number of categories that will be included in your new variable.

Categories:

NOTE: An unclassified code will also be created as well as the above number of categories.

You can define the sequence of these categories below. If they have no particular sequence, use 'Nominal'

Sequence:

[help...](#)

Click on .

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At this screen we want to define the names of our territories that will be in our variable. For example click on Category 01, and type in Montgomery County & etc:

Create And Update. Descriptions (Step 4 of 10)

The table below shows a set of default codes and descriptions for this new variable. Edit them as required, and click 'Next' to continue

Code	Description
!!	Unclassified
01	Category 01
02	Category 02
03	Category 03
04	Category 04
05	Category 05
06	Category 06
07	Category 07
08	Category 08
09	Category 09
10	Category 10

The territory names have updated:

Create And Update. Descriptions (Step 4 of 10)

The table below shows a set of default codes and descriptions for this new variable. Edit them as required, and click 'Next' to continue

Code	Description
!!	Unclassified
01	Montgomery County
02	Lancaster County
03	Lehigh County
04	Philadelphia County
05	Health Services
06	Educational
07	Food Stores
08	Automotive
09	Sunoco
10	Rite Aid

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Next

Click on

At this screen we will now be assigning the selections that we built earlier by dragging and dropping the selection into selection area for the corresponding description name.

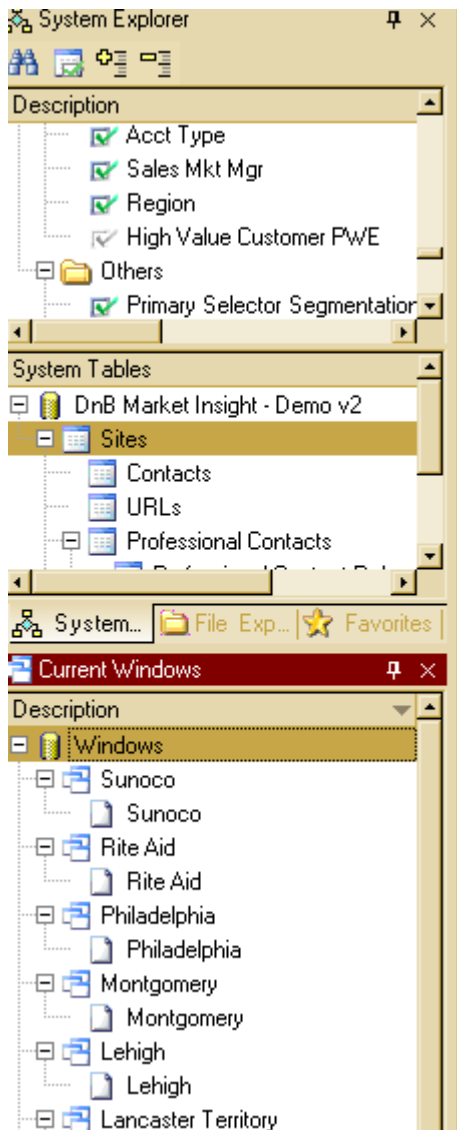
Create And Update. Selections (Step 5 of 10)

You can now assign a selection to each category of your new variable. Drag a selection onto each category, or right click to browse for a selection.

Description	Selection
Unclassified	
Montgomery County	Drop your selection here
Lancaster County	Drop your selection here
Lehigh County	Drop your selection here
Philadelphia County	Drop your selection here
Health Services	Drop your selection here
Educational	Drop your selection here
Food Stores	Drop your selection here
Automotive	Drop your selection here
Sunoco	Drop your selection here
Rite Aid	Drop your selection here

To do this I have expanded my current windows box as follows, so I can easily drag and drop my selection into the proper selection to the corresponding description.

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As a result, my screen will now look as follows, for example, note that Montgomery County in the description has a corresponding selection of Montgomery:

Create And Update. Selections (Step 5 of 10)

You can now assign a selection to each category of your new variable. Drag a selection onto each category, or right click to browse for a selection.

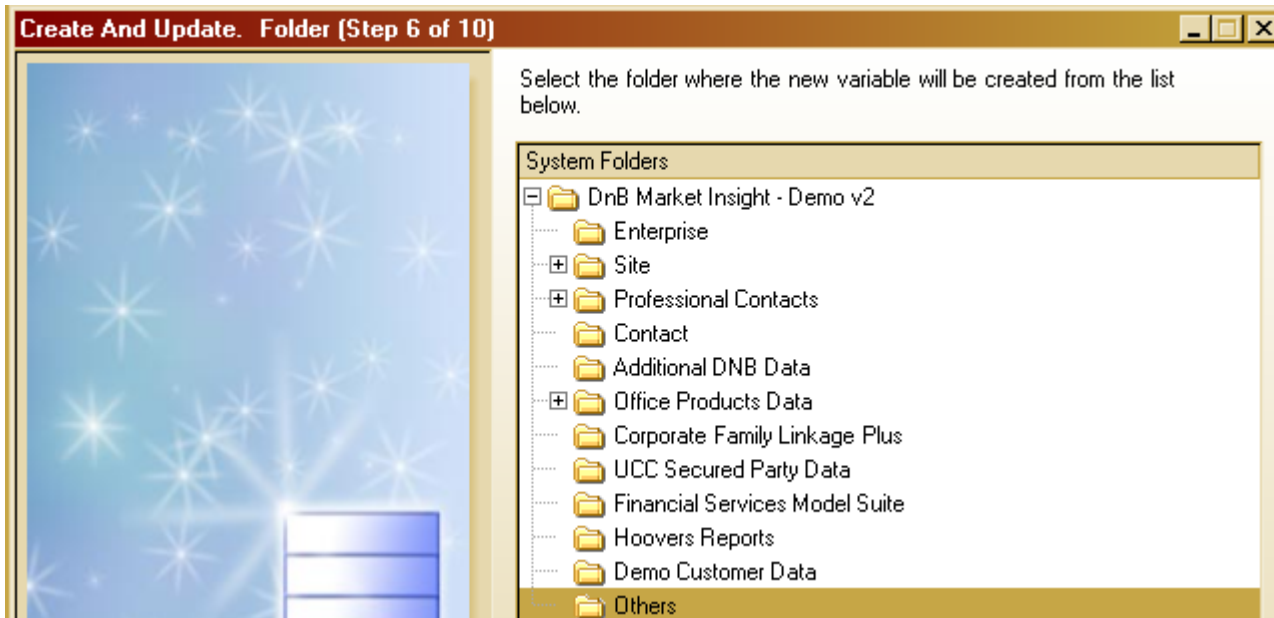
Description	Selection
Unclassified	
Montgomery County	Montgomery
Lancaster County	Lancaster Territory
Lehigh County	Lehigh
Philadelphia County	Philadelphia
Health Services	Health Services
Educational	Educational Services
Food Stores	Food Stores
Automotive	Automotive Dealers
Sunoco	Sunoco
Rite Aid	Rite Aid

Click on **Next**.

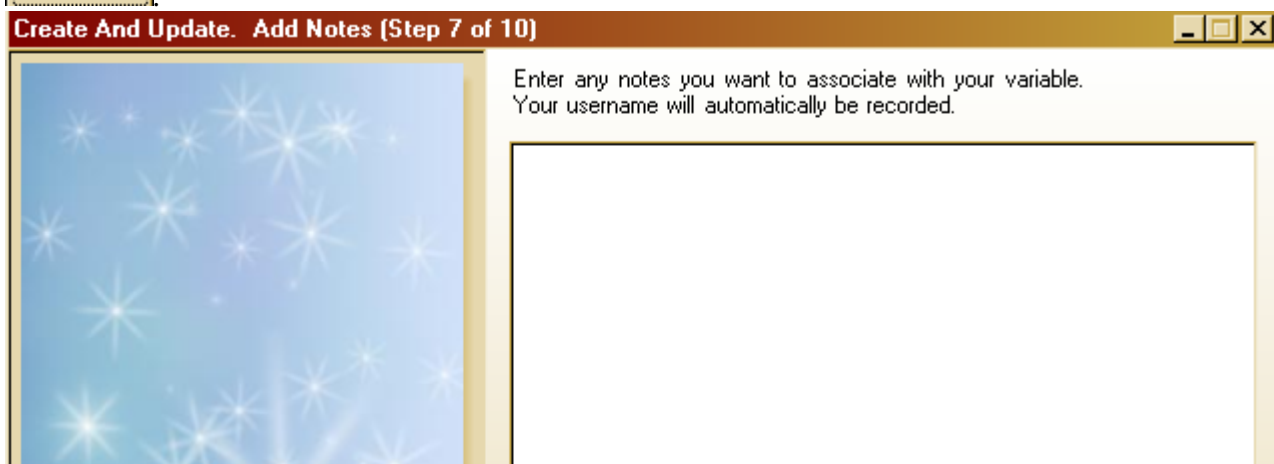
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The purpose of this screen is to designate where your new variable will be going and in this case the default is the Others folder. Click on **Next**.



At this screen you can add any notes that you would like to add, in this case we will leave it blank and click **Next**.



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At this screen in the **Description**, we will be giving the variable a name, this is how it will be displayed in the others folder. For this example we will be calling it Territory example 1110.

This is a screenshot of a software dialog box titled "Create And Update. Name (Step 8 of 10)". On the left is a decorative panel with a blue background and white starburst patterns. The main area on the right contains the following text: "We need a description for your new variable. A unique variable reference will be created for the variable based on the description and table name." Below this is a text input field labeled "Description". Further down, it says: "Alternatively you can choose to overwrite an existing virtual variable with these new values. Drag the variable to be overwritten onto the panel below." This is followed by a rectangular box with the text "Drop the variable to overwrite here". At the bottom, there is a checkbox labeled "Modify Security Attributes" which is currently unchecked.

Next

We added the description name and now you will click on **Next**. (Please note that at this phase you can modify security attributes).

This is a second screenshot of the same "Create And Update. Name (Step 8 of 10)" dialog box. The "Description" text input field now contains the text "Territory example 1110". All other elements, including the starburst panel, the overwrite instructions, the "Drop the variable to overwrite here" box, and the unchecked "Modify Security Attributes" checkbox, remain the same as in the previous screenshot.

When you click next, it will be creating your new territory variable.

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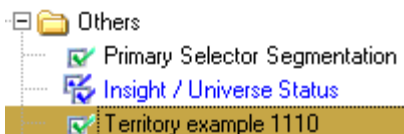


This will be your final screen, at this screen if you want to show this as a variable you can check off the box for



Now how do you make it actionable?

In your system explorer folder, go to your others folder and you will see the new variable it is called Territory example 1110.



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How do you make this actionable? Drag your new variable into your workspace.
Select all of your territories in a selection.

The screenshot shows the 'New Selection 4' dialog box in Market Insight. The 'Selection *' section shows a tree view with 'New Selection 4' and a sub-item 'Territory example 1110 of Educational or Montgomery County or ...'. The 'Territory example 1110' section has a search bar set to 'Description Co' and a table of territories.

Include	Code	Description	Sites
<input checked="" type="checkbox"/>	01	Montgomery County	1,530
<input checked="" type="checkbox"/>	02	Lancaster County	851
<input checked="" type="checkbox"/>	03	Lehigh County	485
<input checked="" type="checkbox"/>	04	Philadelphia County	1,604
<input checked="" type="checkbox"/>	05	Health Services	1,475
<input checked="" type="checkbox"/>	06	Educational	388
<input checked="" type="checkbox"/>	07	Food Stores	497
<input checked="" type="checkbox"/>	08	Automotive	593
<input checked="" type="checkbox"/>	09	Sunoco	11
<input checked="" type="checkbox"/>	10	Rite Aid	34

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Drop a cube on top of the selection, and drag your new territory data element onto the cube as a row, and site status as a column. This will give you a view of how many customers you have in each of the territories and how many opportunities in each of the territories. You can click on all of the cells and drag a chart on top of the cube and then transfer the chart to PowerPoint for a presentation. You can click on cells and drag to your workspace and do further analysis. Do you need to expand the territories? Do you need to add reps to a territory or realign?

The screenshot shows the 'New Selection 4' window in Market Insight. The window has a toolbar with various icons for data manipulation. Below the toolbar, there is a 'Cube' section with a 'Site Status' dropdown and a 'Drop your variable here' text box. The main area displays a table with the following data:

	Customer	Prospect	TOTAL
Montgomery Cou	77	1,453	1,530
Lancaster County	41	810	851
Lehigh County	30	455	485
Philadelphia Cou	80	1,524	1,604
Health Services	68	1,407	1,475
Educational	14	374	388
Food Stores	35	462	497
Automotive	29	564	593
Sunoco	2	9	11
Rite Aid	0	34	34
TOTAL	376	7,092	7,468