

Veeva & U Webinar

An update of Territory Management 2.0

...one year left



This presentation is for informational purposes only and does not constitute legal or other professional advice. You should consult your own legal or compliance team before making a compliance decision. All information is provided “as is”, with no guarantee of completeness, accuracy, timeliness or of the results obtained from the use of this information, and without warranty of any kind, express or implied. In no event will Veeva be liable to you or anyone else as a result of your use of this information





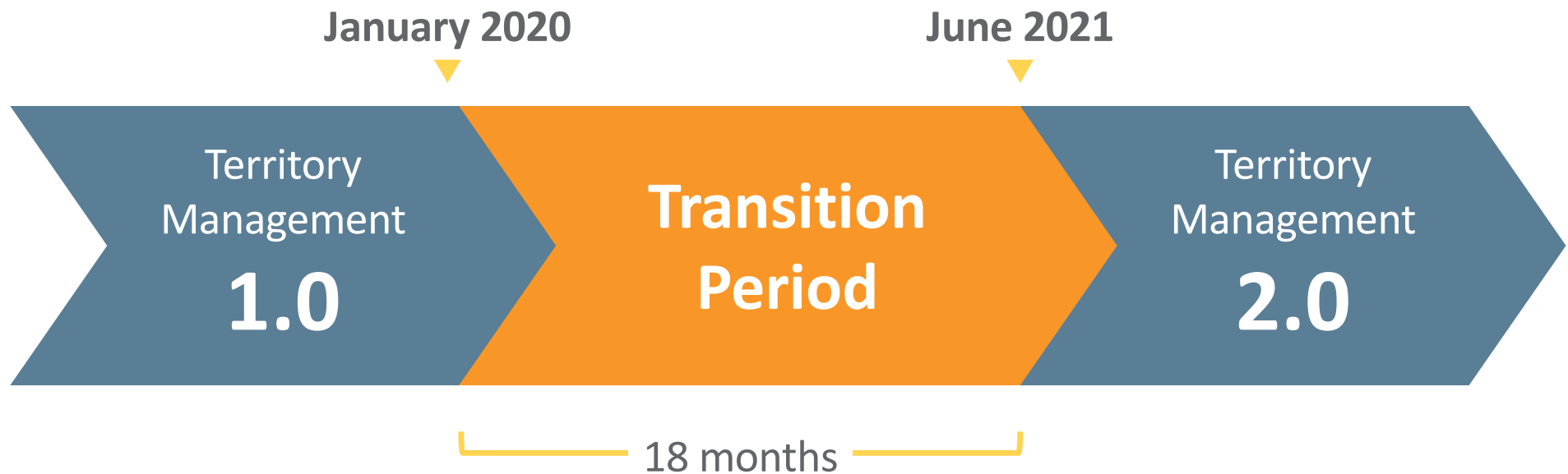
Viktor Fasi
Practice Manager, Align
Services, Europe



Albert Almeyda
Senior Customer Success Manager

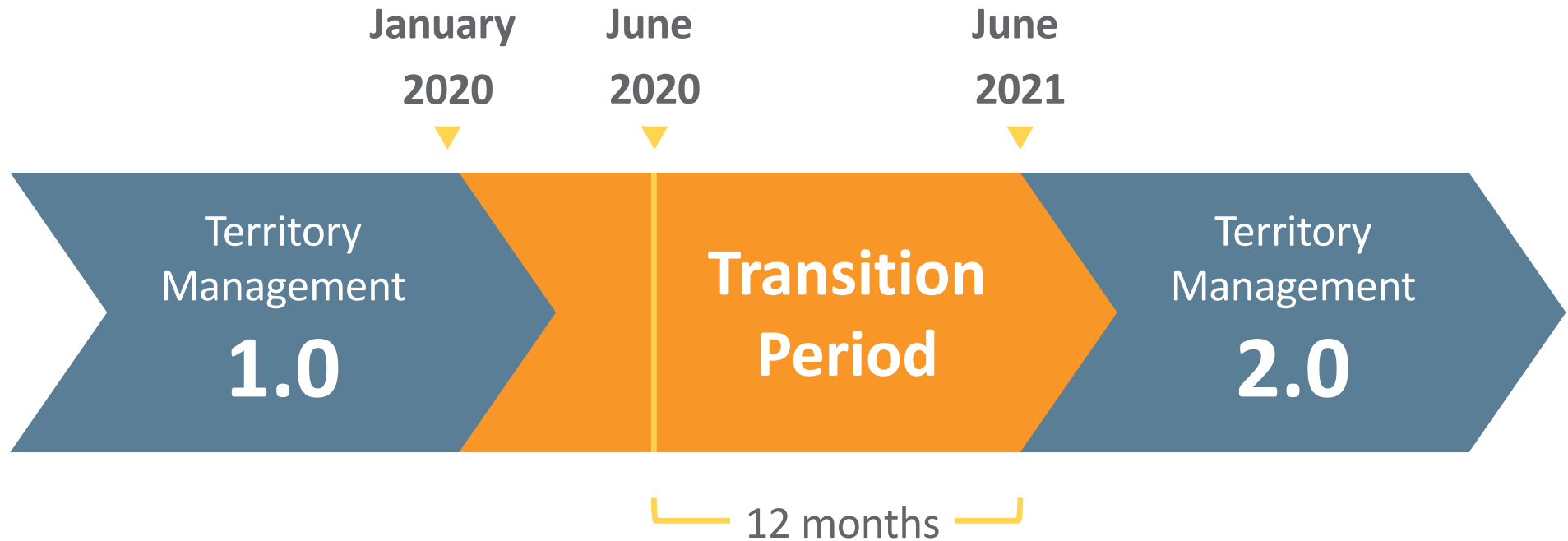


Timeline



Veeva is recommending all customers migrate to TM 2.0 right away as to not increase remediation efforts which will incur over time.

Timeline



Veeva is recommending all customers migrate to TM 2.0 right away as to not increase remediation efforts which will incur over time.

8%

% of Production Orgs already migrated to TM2.0
(June 2020)



Territory Management 2.0



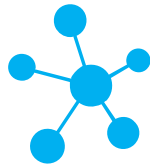
Learning Session Objectives – TM2.0

Why



- Why is TM2.0 coming to Veeva?
- Why has the timeline changed to June '21?

What



- What exactly will be impacted by it?
- What can customers do to be ready for the change?
- What is Veeva doing to support them?
- What can I do to assist in the process?

When



- When is Veeva CRM TM2.0 ready?
- When is Veeva Align TM2.0 ready?
- When should the customer best switch to TM2.0?

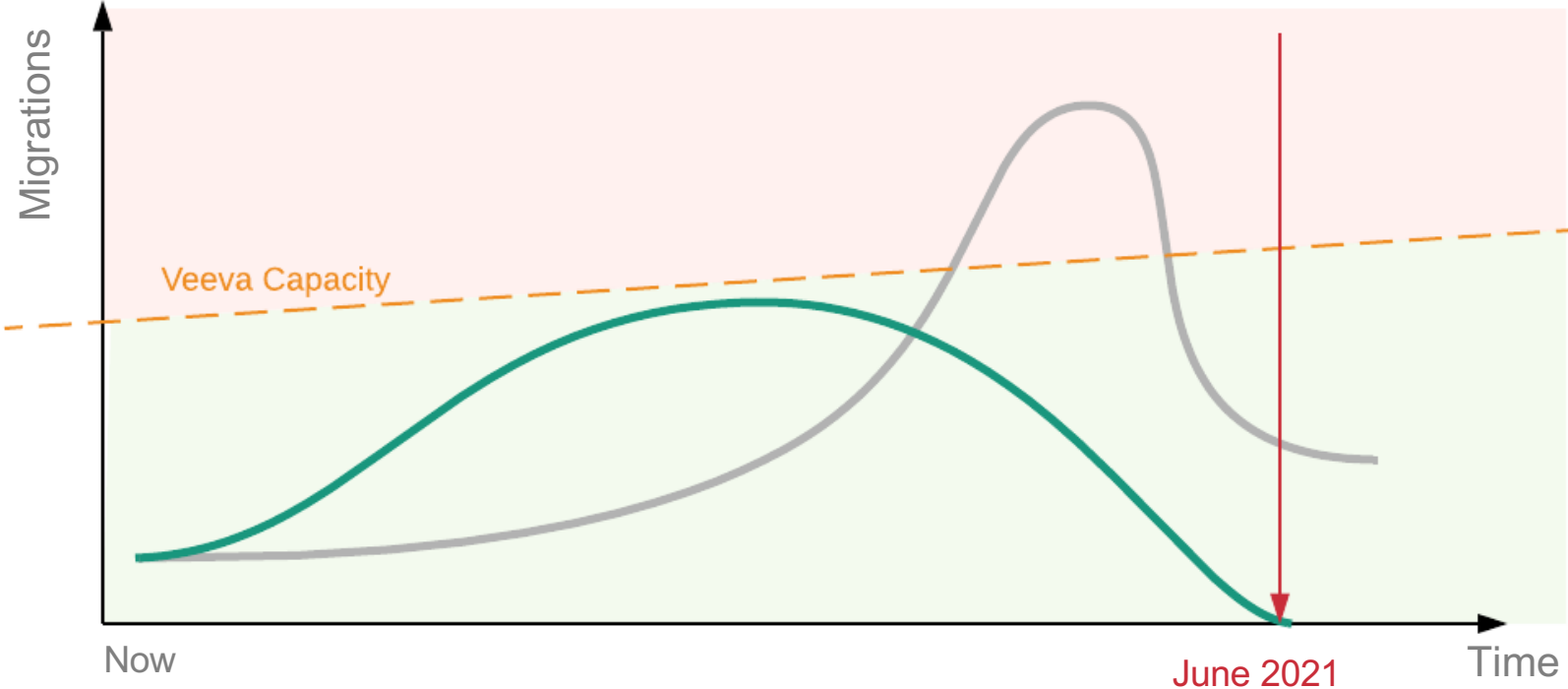
How



- How to migrate from TM1.0 to TM2.0?
- How to switch on TM2.0 in CRM?
- How does TM2.0 work ones enabled?



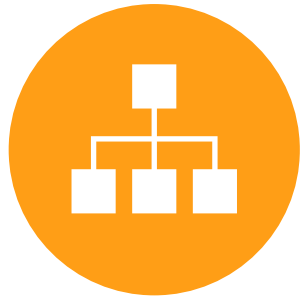
Help Flatten the Migration Curve





TM2.0 Quick Refresh

Territory Management



Territory
Tree



Assign
Users /
Roster
Members



Assign
Accounts



Access



Rules



Territory Management in Salesforce.com



What will be impacted in my Org?

Key Considerations

Territory 2.0 has a new object model that will require migration for all customers

- Customers must re-load the territory hierarchy and user-to-territory assignments in this new data model
- This can be automated for Veeva Align customers

After the retirement date, users will no longer be able to access the original Territory 1.0 data via the UI or API

- All territory and assignment data should be extracted **before** cutover to TM 2.0

Veeva customers must also update other areas of their implementations

- Sharing rules, custom code, reports, integrations, MyInsights visualizations, account page layouts, CLM content, data loading processes, managed apps etc.

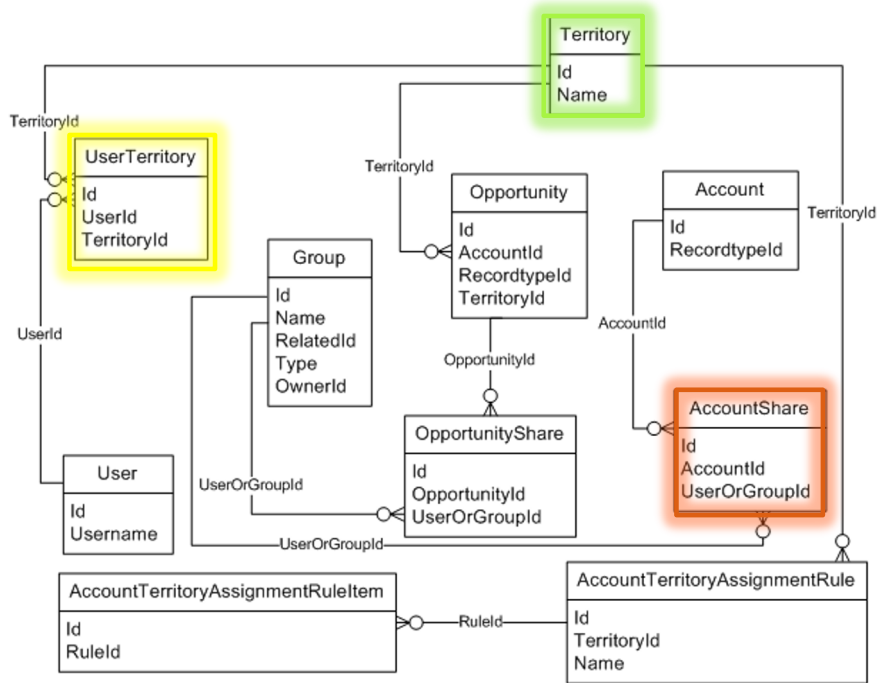
When ready, the migration must be arranged with Salesforce support

- Must occur after 19R3 release
- Enterprise Territory Management turned on
- All data and code migration must be complete for the entire Org
- Salesforce recommends a weekend

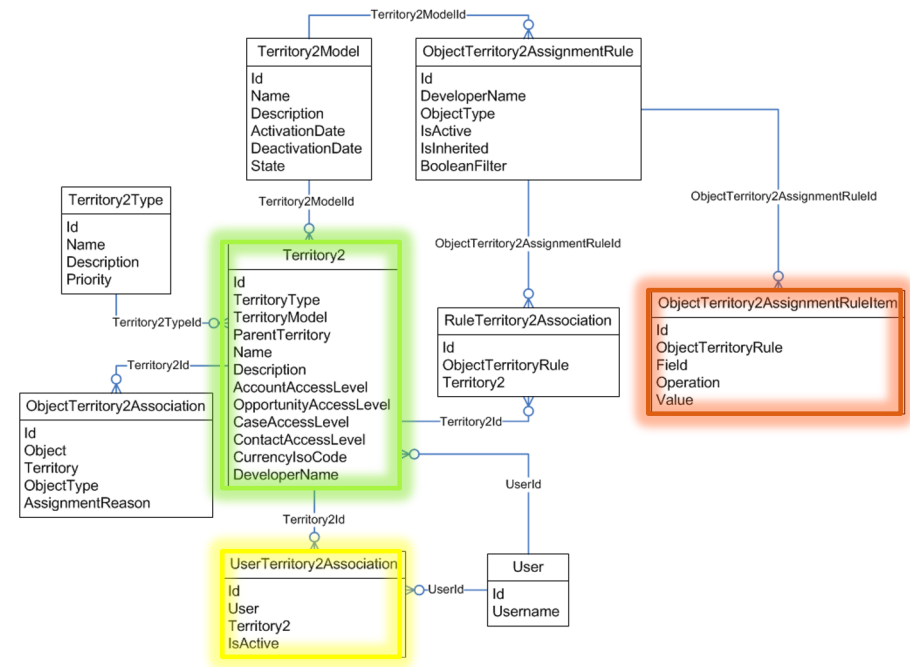


TM 1.0 vs TM 2.0 Differences

The key objects of interest to Veeva customers are:






Territory Management
1.0



Territory Management
2.0



Differences Between TM 1.0 and TM 2.0

Features	Territory Management 1.0 	Territory Management 2.0 	Align 
Assign accounts to territory	✓	✓	✓
Assign users to territory	✓	✓	✓
Assign products to territory	✗	✗	✓
Brick/zip to territory	✓	✓	✓
Assignment rules based on account criteria	✓ (limited)	✓	✓
Assignment rules based on product metrics	✗	✗	✓
Assignment rules based on child account	✗	✗	✓
Preview territory assignments	✗	✓	✓
Historical alignments	✗	✗	✓
Territory modeling	✗	✓	✓
Territory map	✗	✗	✓
Decision support (adjustments via map)	✗	✗	✓
Target planning	✗	✗	✓
Field feedback (alignments and targeting)	✗	✗	✓



Different Territory managed scenarios

Territories are usually managed by Country or in Regional clusters

Veeva CRM

ATL, B2T, Z2T or AccountShare custom code

Veeva Align

Align manages all Territories

ATL, B2T, Z2T or AccountShare custom code

Veeva CRM

+

Veeva Align

Align manages part of the countries

This will determine the data migration effort and procedure ...





TM2.0 Deep Dive –
What, when and how

What does Veeva do to support the customer?

Product Investment

- Supporting TM2.0 in **all Veeva products** with the 19R3 release (CRM, CRM Add-Ons, Align)
- Updated **170 areas of CRM code spanning 20 modules** with rigorous testing
- **20 + code mitigations in Veeva Align's integration with CRM**
- **Actively engaged with SFDC** to improve migration process and TM2.0 capabilities, and salesforce built migration tools

Customer Success Investment

- **FREE ADDITIONAL assessment** of CRM production orgs to assist customers in starting remediation efforts before migration
- **Budgetary estimate** for every CRM production org to assist customers with budgeting and planning
- Customer and partner **communications, education, and documentation** to support remediation efforts

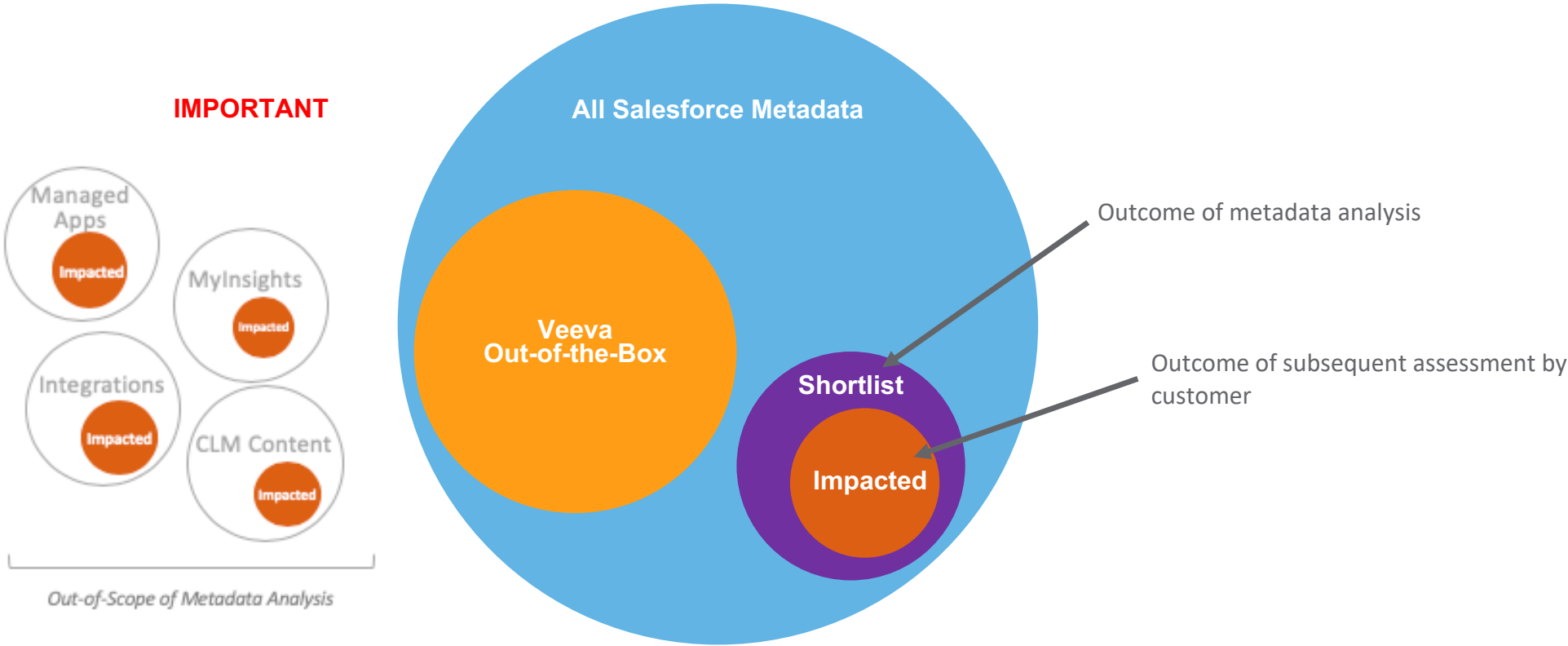
Services Investment

- **Reduced Professional Services Rates** for TM2.0 remediation services
- Replacement of **Global Account Search (GAS)** is provided



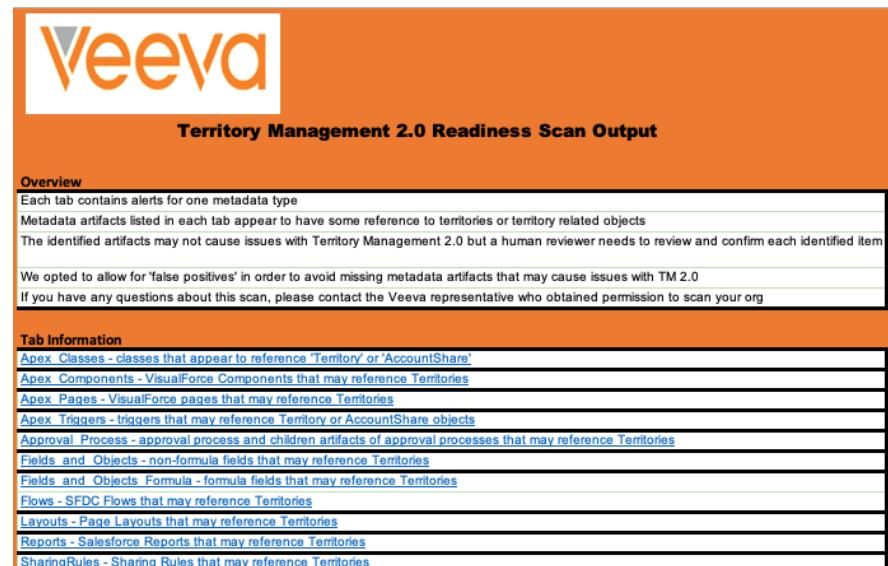
WHAT - TM 2.0 Impact Analysis

- To provide a shortlist of items to be assessed for Territory Management 2.0 impact



Analysis Content (SFDC Metadata Impacted Area)

- Analysis lists all metadata items containing the strings “**territ**” or “**accountshare**”
 - “Safe” approach that avoids false-negatives
 - Veeva out-of-the-box items are excluded from the analysis
 - Anything **not** in the Salesforce.com metadata is out of scope (e.g. custom MyInsights, CLM, External Integrations)
- The format is a spreadsheet (one per org) with the following tabs:
 - Apex Classes
 - Apex Components
 - Apex Pages
 - Apex Triggers
 - Approval Processes
 - Fields and Objects
 - Formula Fields
 - Process Builder Flows
 - Page Layouts
 - Reports
 - Sharing Rules
 - Workflow Alerts
 - Workflow Field Updates
 - Workflow Rules
 - Workflow Tasks
 - Appendix 1 - Queries

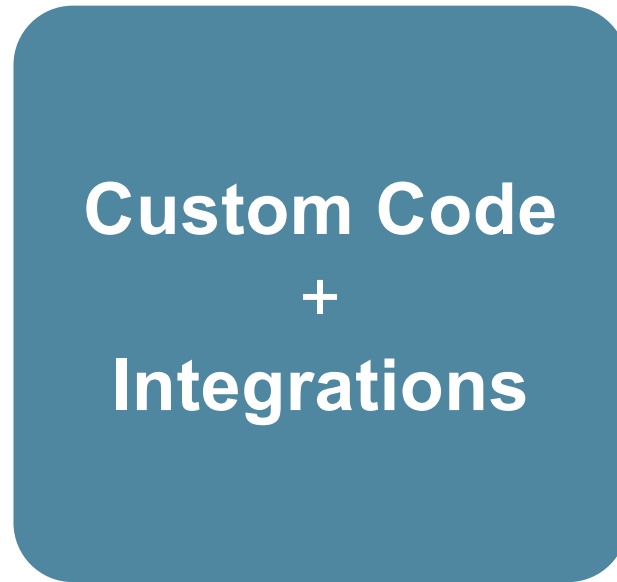


The screenshot shows a spreadsheet titled "Territory Management 2.0 Readiness Scan Output" with the Veeva logo at the top. It contains an "Overview" section with introductory text and a "Tab Information" section listing various metadata types with hyperlinks to their respective tabs.

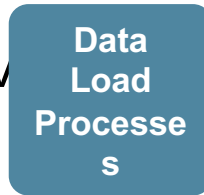
Tab Information
Apex Classes - classes that appear to reference Territory or AccountShare
Apex Components - VisualForce Components that may reference Territories
Apex Pages - VisualForce pages that may reference Territories
Apex Triggers - triggers that may reference Territory or AccountShare objects
Approval Process - approval process and children artifacts of approval processes that may reference Territories
Fields and Objects - non-formula fields that may reference Territories
Fields and Objects Formula - formula fields that may reference Territories
Flows - SFDC Flows that may reference Territories
Layouts - Page Layouts that may reference Territories
Reports - Salesforce Reports that may reference Territories
SharingRules - Sharing Rules that may reference Territories



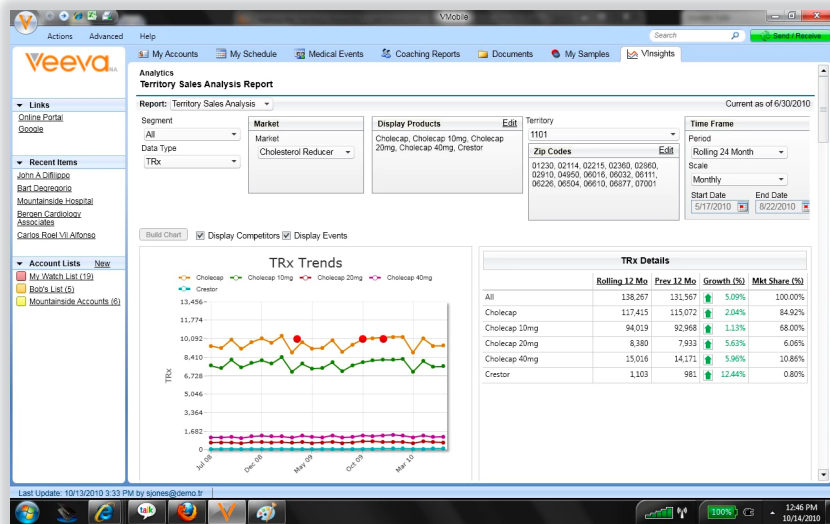
WHAT - Impacts



Veeva



WHAT - Impacts



Professional
Lamarche, Nelson S

Details

Name: Dr. Nelson S Lamarche
 Middle: [Blank]
 Suffix: [Blank]
 Preferred Name: Nelson
 Network External ID: 219070954851009536

Account Identifier: Super Target
 Gender: M
 Credentials: MD
 Specialty: Cardiology
 Verteo Specialty: Cardiology
 Primary Parent: Chilton Memorial Hospital

Ranking

Customer Segmentation: High
 Decile: 8

Addresses

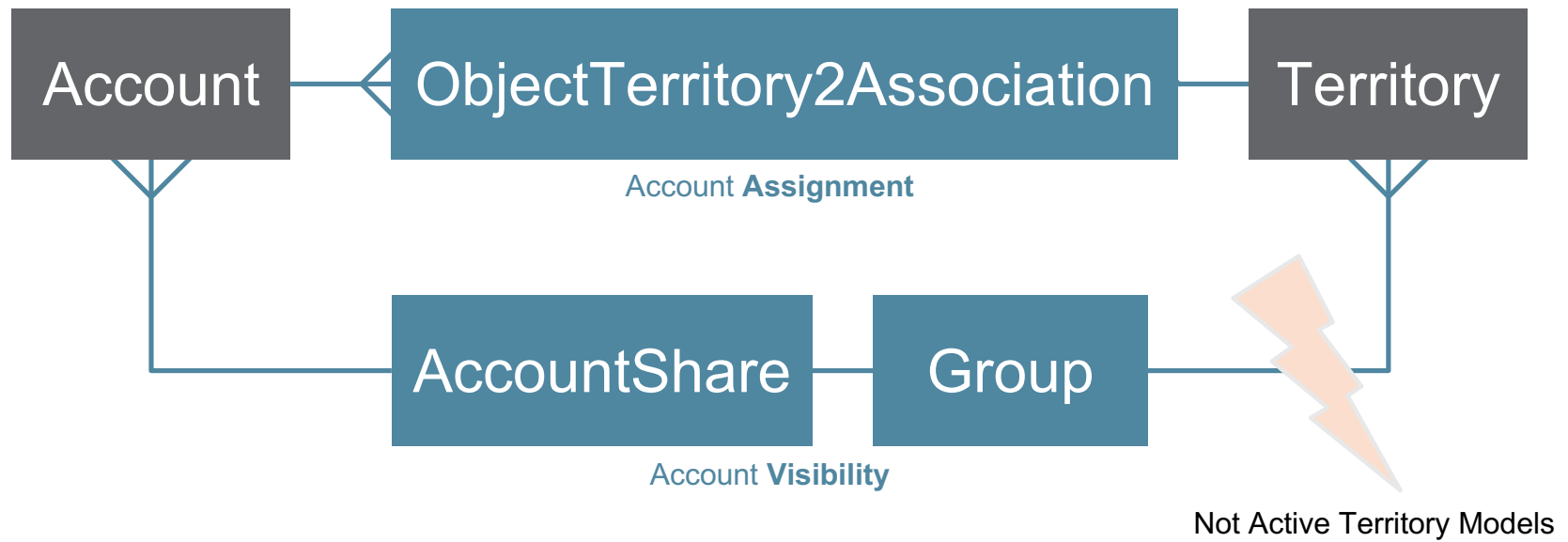
Address line 1
 222 Schank Rd
 2102 Corlies Aven
 222 Schank Rd
 273 Kings Mounta
 Show All

Obsolete Devices / Versions Upon Migration to TM 2.0:

- Veeva CRM Tablet Edition
- Veeva CRM on Windows 8
- Veeva CRM on Windows 10 devices prior to Build 16299 (Fall Creators Update, version 1709)

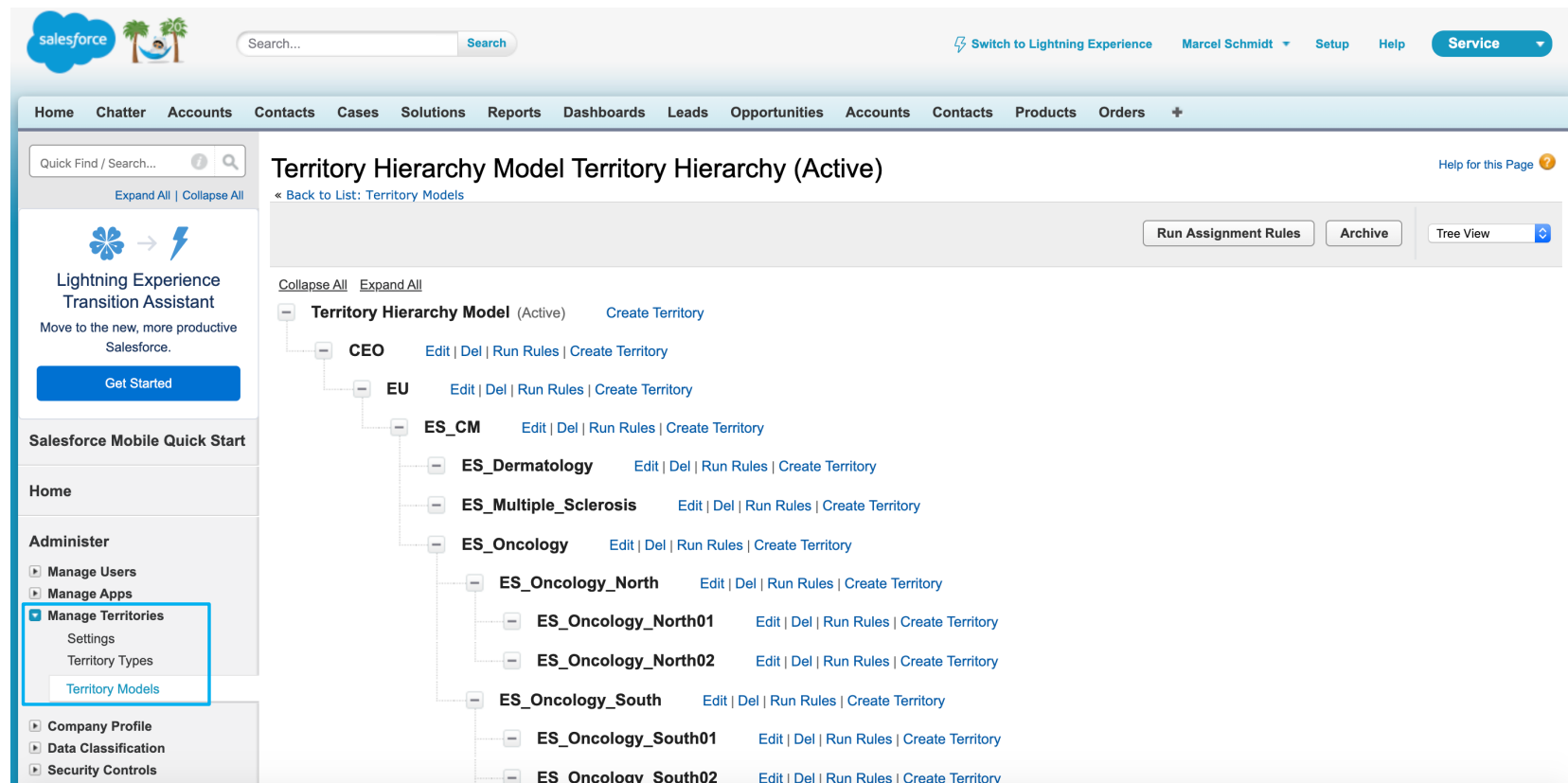


WHAT - Visibility and Assignment



WHAT – Territory Hierarchy becomes Territory Model

Territory Model Territory Hierarchy (example from Developer Org)



The screenshot displays the Salesforce interface for a Territory Hierarchy Model. The top navigation bar includes the Salesforce logo, a search bar, and user information (Marcel Schmidt). The main navigation menu lists various Salesforce modules. The left sidebar contains a 'Lightning Experience Transition Assistant' and a 'Manage Territories' menu item, which is highlighted with a blue box. The main content area shows a tree view of the territory hierarchy, starting with 'Territory Hierarchy Model (Active)' and branching into 'CEO', 'EU', 'ES_CM', 'ES_Dermatology', 'ES_Multiple_Sclerosis', 'ES_Oncology', 'ES_Oncology_North', 'ES_Oncology_South', and their respective sub-territories. The 'Territory Models' menu item in the sidebar is highlighted with a blue box.



WHAT – Territories field gets replaced by related lists

Territories field on Account detail page gets replaced by related lists (example from Developer Org / pre 19R3)

~~Territories DESF01054-BIOS, DESF0103_HS, DESF472-SMA, DESF01074-BIOS [Change]~~



Assigned Territories		Assign Territories			
Action	Territory	Territory Model	Model State	Assignment Date	Method
Remove	ES_Oncology	Territory Hierarchy Model	Active	05.06.2019 11:15	Territory Manual
Remove	ES_Oncology	Territory Hierarchy Model CLONE	Planning	05.06.2019 11:24	Territory Manual

Users in Assigned Territories				
Full Name	Email	Role in Territory	Territory	Territory Model
Marcel Schmidt	[Redacted]		ES_Oncology	Territory Hierarchy Model
Marcel Schmidt	[Redacted]		ES_Oncology	Territory Hierarchy Model CLONE



WHAT – Territory page changes

Territory page changes (example from Developer Org / pre 19R3)

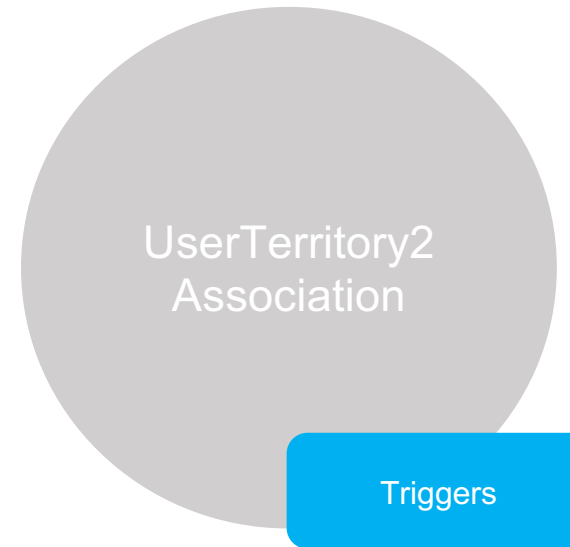
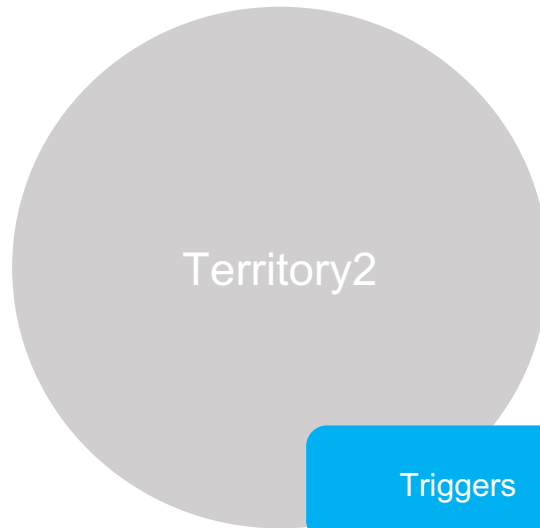
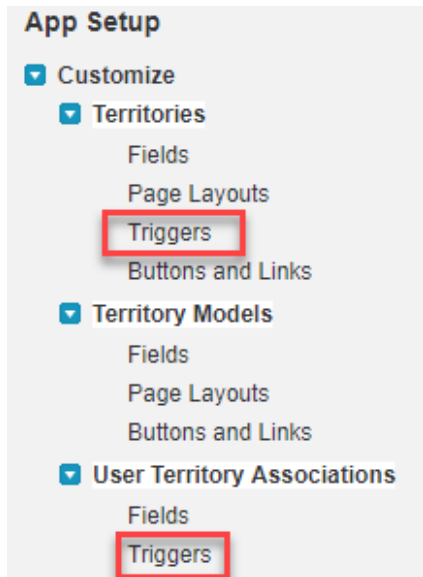
The screenshot shows the Salesforce Territory page for 'ES_Oncology'. The page is divided into several sections:

- Territory Detail:** Shows basic information such as Label (ES_Oncology), Territory Name (ES_Oncology), Territory Type (Territory), Territory Model (Territory Hierarchy Model), Parent Territory (ES_CM), and Forecast Manager.
- System Information:** Displays 'Last Modified By' as Marcel Schmidt and 'Last Modified Date' as 05.06.2019 10:36.
- Territory Access Levels:** Lists access levels for Accounts, Opportunities, and Cases, with descriptions of what users can view or access.
- Assigned Users:** A table showing users assigned to the territory. One user, Marcel Schmidt, is listed with his email and active status.
- Manually Assigned Accounts:** A section for accounts manually assigned to the territory, currently showing one account named GenePoint.
- Inherited Assignment Rules:** A section for rules inherited from parent territories, currently showing no records.
- Assignment Rules Assigned to This Territory:** A table showing rules assigned to this territory. One rule, 'ES_Oncology_Accounts', is listed as active and applied to child territories.
- Child Territories:** A section for child territories, currently showing two child territories: 'ES_Oncology_North' and 'ES_Oncology_South'.



WHAT - New Apex Capabilities

Apex Triggers are now available for the following objects



WHAT - Global Account Search vs Org-Wide Account Search

	GAS	OWAS
Search in Accounts and Addresses Outside of Territory	✓	✓
Filter Searches	v2+	✓
Classic UI compatible	✓	✓
Lightning Experience support	✗	✓
Add Account to Territory with History	V2+	✓
Multi-Account add to Territory	✗	✓
Create New Account using New Account Wizard	✗	✓
Shows accounts on a map using Longitude and Latitude data on their Address records	✗	✓
Managed Package and easy install	✗	✓
Install Wizard per Profile	✗	✓
Changeable code by Partners	✓	✗
Territory Management 2.0 Support	✗	✓
Implementation by Partners	✗	✗
Maintenance by Partners	✓	✗

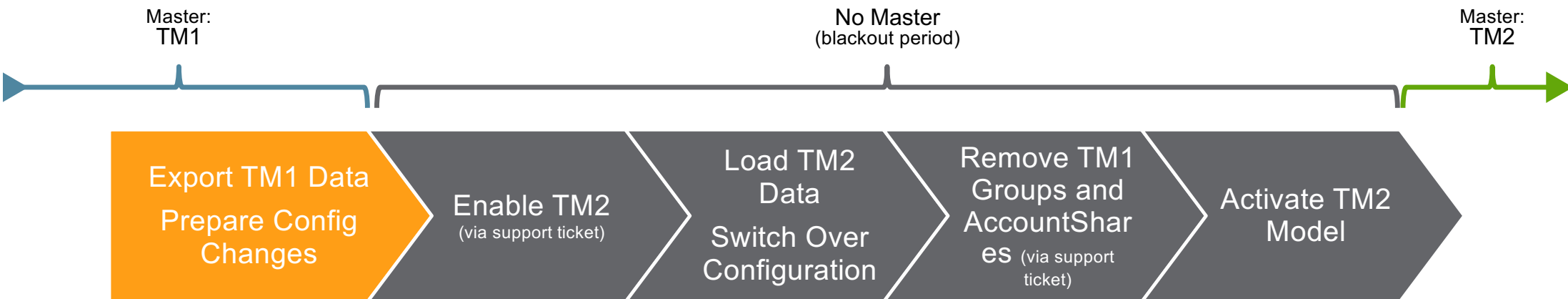


WHAT - Reporting Impact Analysis

SCENARIO					EXPECTED BEHAVIOR AFTER TM2 TRANSITION	
#	Report Type	Report Type includes Territory Object	Primary Object in Report Type is Territory?	Report Utilizes "Territory Information" Fields? *	Report Types	Reports
1	Standard	Yes	Yes	Yes	Disappear	Disappear
2	Standard	Yes	No	Yes	Remain	"Territory Information" fields disappear from reports *
3	Standard	Yes	No	No	Remain	Remain the Same
4	Standard	No	N/A	Yes	Remain	"Territory Information" fields disappear from reports *
5	Standard	No	N/A	No	Remain	Remain the Same
6	Custom	Yes	Yes	Yes	When clicked, a "Data Not Available" error will display.	When clicked, an "Insufficient Privileges" error will display.
7	Custom	Yes	No	Yes	Territory object will disappear from Report Type	"Territories" fields disappear from reports.
8	Custom	No	N/A	N/A	Remain	Remain the Same



WHEN - Data Cutover Procedure

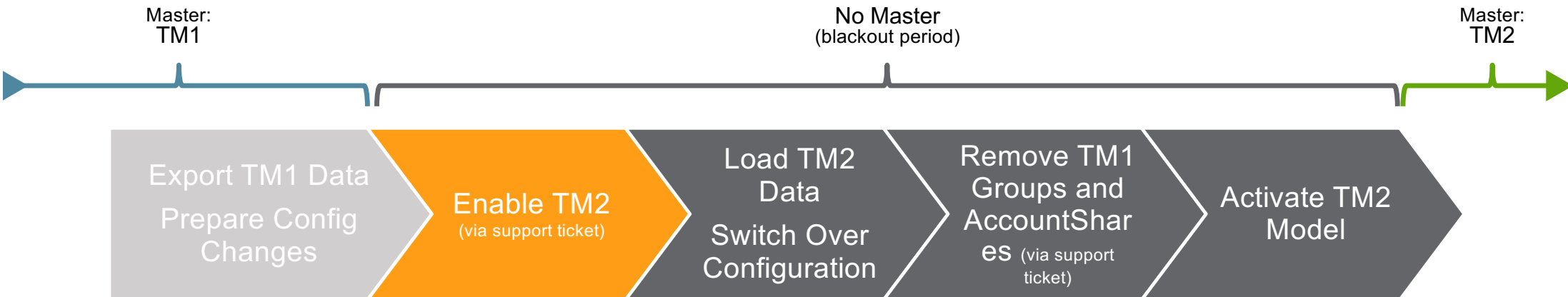


(Jan 2020 – Jun 2021)

Exact date depends on customer



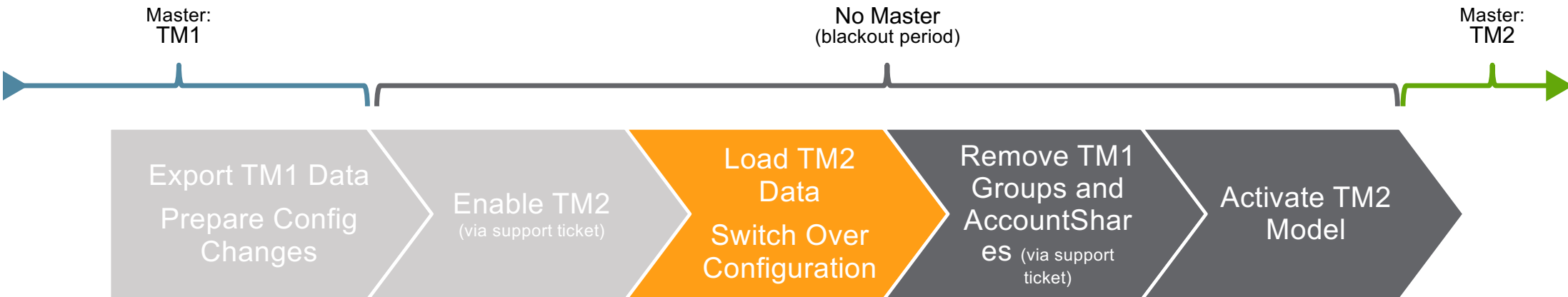
HOW - Data Cutover Procedure



Just takes a few steps...



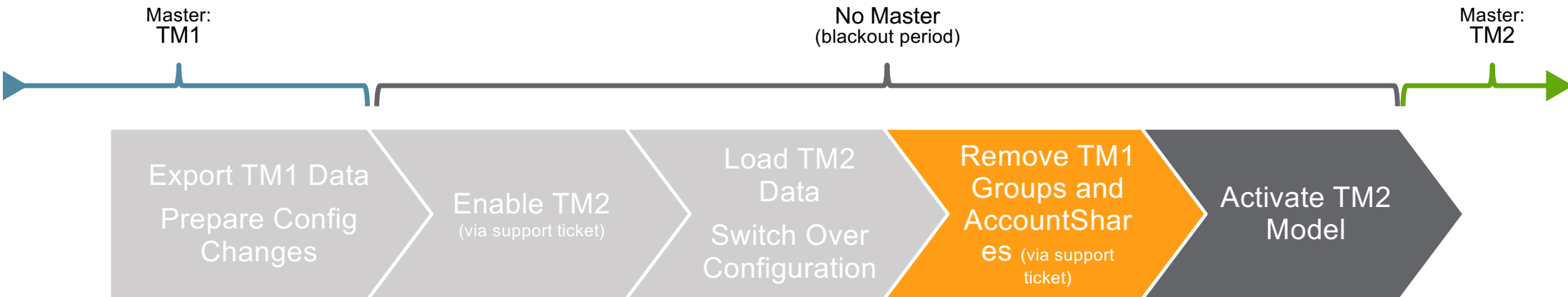
HOW - Data Cutover Procedure



Mappings already available in Gap Analysis document Appendix section



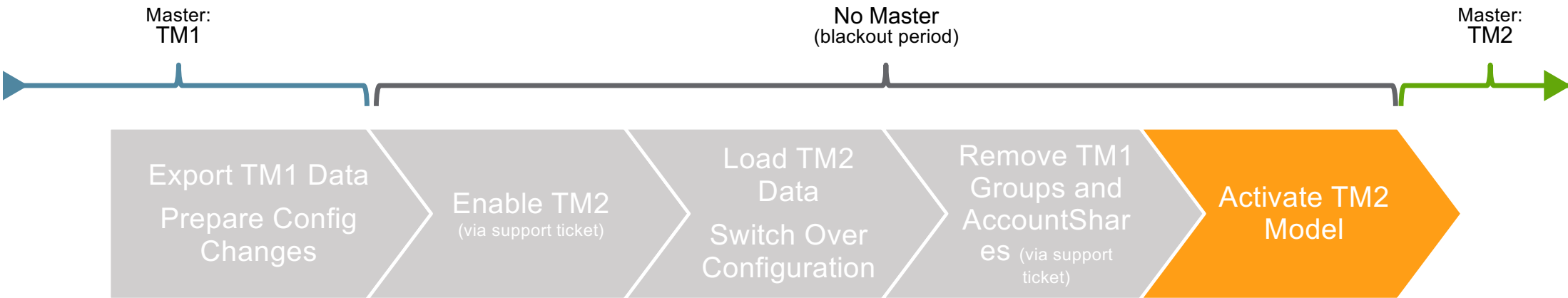
HOW - Data Cutover Procedure



Obsolete TM1 data gets deleted



HOW - Data Cutover Procedure



Just by clicking a button –
TM2.0 go-live



Transition Steps

1

Assessment and Communication

- Check if you need Veeva Services Help

2

Remediation

- Request one free org reassessment

3

Migration

- Plan your migration window in time



Veeva&U: updates on next events

Europe

Veeva

Products Services Customers Resources Events About Veeva Search

Home · Veeva & U Commercial Innovation Hub

Veeva & U

Your Dedicated Commercial Innovation Hub

Overview Community Forums CRM Innovation Hub Releases Vault PromoMats Hub

Thank You

