



CUSTOMER MANAGEMENT: UNDERSTANDING DRAW TERRITORY | WORKSHOP PREWORK





Steps to complete prior to the workshop:


- ☐ Build a heat map of your customers using BatchGeo.
- ☐ Assess findings, determine areas of success and those with opportunity.
- ☐ Develop a prospect list using the EWG database.
- ☐ Submit your top 5 new prospects to us using the link provided in email by April 18.

How to build a heat map:

- Access the BatchGeo – Customer Heat Map Template linked in the email.
- Enter your customer information in yellow cells. If you need more, insert cells in the middle so it retains the formatting.
- Once that is complete, visit www.batchgeo.com.
- Copy and paste your data into the box on the main page or upload your file.
- Click "Map Your Data."
- Follow the screen prompts, insert a "Title" for your map, and then type your email address. Choose "unlisted" for privacy, then choose "Save Map."
- Check your inbox and click the link beneath "Your new map is available here" to see your complete customer heat map!

It's time to assess your findings! Please come prepared to discuss these during the workshop:

-  What areas do you have noticeable growth opportunities where you have very few customers?
-  Are there any customers that are isolated to an area by themselves?
-  What do you think is working well with the customer(s) that are isolated to an area by themselves?
-  Could you find more producers in that immediate area?

-  After carefully assessing your findings and identifying at least two areas you could focus on for growth, it's time to build a prospect list using the EWG database.

How to access the EWG database to build your prospect list:

- Refer back to the live session replay for demonstration. This is found in your inbox or online workspace.
- Visit the Subsidy Database at <https://farm.ewg.org/>
- Select your state, and data will populate.
- There are several ways to search the data:
 - 1. At the top of this page, you will see drop-downs for state and county. Select whichever you'd like to search, and then choose "Top Recipients 1995–2021" from the far left-side menu to view data.
 - 2. Return to the home screen and select your state. Scroll to the bottom of the screen and choose "Search for farm subsidy recipients." You can search by zip code or producer name and state to view data.