How to update an Account's Market Segmentation

Market Segment, Market Sub-Segment, Customer Type, Customer Sub-Type, Clinical Type

WHO

WHO can submit?

- Any member of the **sales territory team** can submit, however, the change will need to be **approved by the Account Owner**

WHAT

WHAT information is required to submit a change request?

- Business Justification for the change

Market Segment changes:
- New Proposed Segment(s) and associated % allocation*(s) or sub-segments

Customer Type changes:
- New Proposed Customer Type

Clinical Type changes:
- New Proposed Clinical Type

* % allocation MUST equal 100%

WHEN

WHEN can changes be made?

- Proposed changes can be submitted any time

Once a request is fully approved, it is included in a list sent to Data Stewards every Monday for direct update in SFDC.

Account Owner approval is required for all requests submitted by third party (e.g., Sales Specialists). No further approvals required if the existing values are blank, for market sub-segment changes only or if the account has no shipments

DSM approval is required if the request is for an account with existing values and revenue more than $200k in the last 4 Qtrs (excluding market sub-segment changes only)

Governance Committee approval is required for Market Segment and Customer Type/Sub-type requests for accounts with revenue more than $0. It is not required for Clinical Type requests, for accounts with missing segmentation values (regardless the revenue) or for market sub-segment changes only.

HOW

HOW to submit?

- Use **SegmentIT**, which is accessible in 2 ways:

Via the tool:
- https://segmentit.illumina.com/#/home
- Use okta (SSO)
- Must be logged in to VPN
- Defined by territory access (ILMN ETM)

Via SFDC - On account page, a button has been added under the 'Segmentation' tab, which leads directly to the tool:

Need Help?

Contact salesops_EMEA@illumina.com