

# Territory Planning Guide

For \_\_\_\_\_ AE Date \_\_\_\_\_

- **Objective**
  - ◇ To maximize volume with the least expense and effort
- **Goal \$ \_\_\_\_\_ Quota \$ \_\_\_\_\_**
- **Key indices and ratios**
  - ◇ Average contract \$ \_\_\_\_\_
  - ◇ Contracts needed for goal \_\_\_ closing average \_\_\_\_\_
  - ◇ Number of Research Phase calls per proposal \_\_\_\_\_
  - ◇ Number of leads/relationship calls per Research Phase appointment \_\_\_\_\_
- **Strategic plan**
  - ◇ Profile ideal prospect
  - ◇ Identify target industries/companies that match profile in your territory
  - ◇ Identify customers in your territory that can be used for site visits
  - ◇ Complete prospect profiles, including blue sheets & buyers grids for each prospect
  - ◇ Complete an account plan for each customer.
  - ◇ Complete Mackay 12 for each competitor
- **Travel and call scheduling**
  - ◇ Map “A” leads determined by Success Probability Formula & prospect profile
  - ◇ Set appointments with “A” leads. Use “B” and “C” leads as backups
  - ◇ Never travel out of town to call on “B” and “C” leads without an “A” appointment
  - ◇ Spending too much time with existing customers (receptive audience) or cherry-picking a territory resulting in excessive travel and reduced selling time lead to poor results
- **Market potential**
  - ◇ Total market = A + B + C prospects + growth potential to existing clients \$ \_\_\_\_\_
  - ◇ Our goal of market share as a percentage \_\_\_\_\_%