



PureSynergy Consulting

Insightful Strategies, Tangible Results

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Simplified Guide to Territory Mapping Design and Management

Introduction

Effective territory mapping design and management are crucial for maximizing the potential of your sales or service teams. This guide will help you understand the basics and get started with designing and managing your territories.

1. Fundamentals of Territory Management

- **Definition:** A territory is a customer group or geographical area assigned to a sales or service team.
- **Benefits:** Improved customer coverage, increased revenue, balanced workloads, reduced travel costs, and enhanced team motivation.

2. Types of Territories

- **Geographical Territories:** Defined by physical boundaries (e.g., cities, states). Ideal for businesses requiring in-person engagements.
- **Account-based Territories:** Based on specific customer accounts, focusing on strategic importance rather than geography.
- **Hybrid Territories:** Combine geographical and account-based approaches for optimal coverage.

3. Designing Effective Sales Territories

- **Principles:**
 - Cover existing customers and prospects.
 - Balance workloads and distribute potential fairly.
 - Maximize the number of people hitting quotas.
 - Reduce selling expenses.
 - Consider efficient travel routes.
- **Steps:**
 - **Analyze the Market:** Understand past performance, local trends, and competitor activity.
 - **Segment Customers:** Categorize clients by location, industry, and strategic importance.
 - **Perform a SWOT Analysis:** Identify strengths, weaknesses, opportunities, and threats.
 - **Draw Territories:** Combine insights to create balanced territories that align with your market and team strengths.



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4. Best Practices

- Build territories from the ground up, focusing on customer needs.
- Base quotas on potential sales opportunities.
- Allow for some imbalances to account for market dynamics and team capabilities.
- Use a workload index to balance demands on your team's time and resources.

5. Essential Tools for Territory Design and Management

- **CRM Integration:** Incorporate CRM data to enhance decision-making.
- **Territory Mapping Software:** PureSynergy Consulting recommends tools like eSpatial for data visualization, scenario planning, and simplified end-user design and management.

Conclusion

Implementing an effective territory management strategy with the right tools can significantly boost your team's productivity and your organization's growth. At PureSynergy Consulting, we're here to help you design and manage your territories for optimal success.