

### Sales Manager's Checklist for Quarterly Territory Planning

#### Using Territory Plan Pro

Territory planning has one goal -to ensure that you are achieving the optimal revenue from each sales territory. Each territory is made up of specific accounts to which your sales rep determines the appropriate allocation of time and resources. The sales manager is critical in making sure that each territory plan and the decisions made will result in the achievement of the territory's revenue goals.

This checklist provides an overview of the sales manager's territory planning activities to be performed each quarter. The focus is to help you achieve your objectives for each of your territories.

Territory planning, reviews and implementation are the foundation for growth in each sales territory. Your territory plans may have some of the following objectives - specific revenue targets, winning high profile accounts or opportunities, net new accounts won, percent increase in business with existing accounts and increase in pipeline/ pipeline velocity. The sales manager must ensure that each territory plan by each rep is designed to meet those objectives.

There are certain activities that will only be performed in the first quarter of using the Territory Planning application and territory planning approach. These are in the set up section. Thereafter, the sales manager implements a repeating set of territory planning, review, and implementation activities each quarter. There are also a few management activities that will not make sense until there has been at least one quarter of use (indicated as "Q2 & beyond").

Further, it is important for the sales manager to use the data in Salesforce.com in determining how territory plans will need to be adapted to achieve quarterly goals. How can a sales manager keep track of the details of each territory without using the CRM data? It would be difficult at best.

#### Best Practices

The Sales Manager's activities related to the creation and management of territory plans and the execution of them by sales reps should be pursued throughout the quarter following this outline:

- Month 1: Territory review (last quarter's results) and planning for this quarter
- Month 2: Territory and target account/opportunity strategy creation and implementation
- Month 3: Close target opportunities, achieve territory objectives for this quarter

In the first quarter, have each territory manager review last quarter's results, generate a territory plan with a few target accounts and target opportunities. With each subsequent quarter, add the next most important accounts and opportunities.

One of the manager's critical roles is to observe trends, communicate them to the team and disseminate guidance to improve the territory planning process and results.

We recommend implementing regular quarterly business reviews with top customers in each territory. This is a great way to engage key accounts, understand their strategic initiatives, resolve issues and accelerate results in these target accounts. In your first quarter of using the Territory Plan Pro app and process, conduct a review of the overall territory plan and a few of the target accounts and target opportunities and add the next most important accounts and opportunities each quarter.

The Checklist is meant to be a template for your use. Feel free to adjust it to your business, team size territory manager assignment and calendar. Further, you may have regularly scheduled sales meetings. It is intended that you integrate these activities into your sales meeting schedule and other management activities.

### Manager's Checklist for Territory Plan Pro (TPP) Implementation

#### Set up

- Set up users in Salesforce.com and assign Territory Plan Pro licenses to each user.
- Sales Manager creates a sample territory plan in TPP to use during user training.
- Establish the focal sections of the Territory Plan Pro territory plan or topics that will be reviewed regularly with each territory manager.
- Conduct user training at a sales meeting. Explain territory planning process, review sample plan, dashboard and select reports. Set expectation of creating and updating territory plans regularly.
- Respond to usage questions quickly so users stay positive about using the app.

### Sales Manager's Territory Planning Weekly Checklist

#### Month 1: Territory review (last quarter's results) and planning for this quarter

##### Week 1

- Assess prior quarter's results
  - Review sale results from the previous quarter for each territory for which a territory plan has been created on TPP. Use TPP dashboard/reports for review.
  - Conduct Win/Loss reviews. Gather insights to share with team, management.
  - Review usage report, TPP Territory Plan Summary by Date report. (Q2 & beyond)
  - Review other reports in Salesforce.com, i.e. forecast reports.
- Identify effective activities and required corrective actions
  - Progress and set-backs identified
  - Determine the criteria of accounts that will be included in territory plans. Ensure account assignments are clear.
- Create/update plans
  - Update territory plans from previous quarter's activities
  - Assign the number of new accounts each territory manager must add into their territory plans.

##### Week 2

- Conduct in-depth review of updates of pre-existing territory plans.
- Schedule quarterly business reviews with customers in top accounts. Use Territory Plan Pro reports and other information to prepare for the meeting.
- Sales Meeting: communicate objectives
  - Communicate quarter's goals and expectations regarding territory plan, app usage.
  - Share how territory plans have driven activity, results in territories. (Q2 & beyond).
- Align territory plans with company strategies and product/market objectives.

**Week 3**

- Review territory plans that are new this quarter.
- Continue to review updates of pre-existing territory plans with focus on new accounts added.
- Check Territory Plan Pro Usage and other reports to ensure new territory plans are generated and existing plans are updated. Send reminders to appropriate team members.
- From territory reviews, synthesize input from the team to disseminate learning to improve the territory planning process.
- Schedule and conduct sales calls in targeted territories and accounts. Identify next steps in territory, accounts and opportunities.
- Territory manager updates territory plan and opportunity advancement strategy. Review call and coach territory manager. Identify next steps to close opportunities- especially this quarter.
- Conduct quarterly customer business reviews. Set quarterly goals. Generate a joint action plan to keep key team members engaged in the process. Continue to schedule and implement customer business reviews over the next few weeks.

**Week 4**

- Sales Meeting: review territory planning app, process with the team.
  - What's working: show value of using territory plans/the territory planning process.
  - Review dashboard, usage report and other reports with team.
  - Instruct team to have a strategy for each territory manager's top 1-3 accounts (depending on assignment) by the end of week 6.
  - What needs improvement: discuss team's questions. Provide guidance regarding a common challenge across the team.
  - Provide instruction on how to use the app/process effectively
- Select and review a few important accounts and TPP reports in 1 on 1 meetings with each territory manager. Have territory manager update the plan. Inform team members of update.
- Schedule territory visit for manager and/or other territory "team members." Territory manager reviews plan for the territory visit, such as accounts to visit and opportunities to pursue- in keeping with the territory plan.
- Continue to schedule and implement sales calls over the rest of the quarter.

**Month 2: Territory and target account/opportunity strategy creation and implementation**

**Week 5**

- For the most critical accounts, review with internal and partner stakeholders, solicit input and solidify engagement. Continue over the next few weeks. Secure support and resources for all or specific territory/account requirements.
- Examine newly revised/ submitted territory plans. Provide feedback to territory managers.
- Territory manager revises plan based on internal stakeholder input. Manager reviews it.
- Manager meets with their management to review status. Use TPP reports and dashboards.
- Update forecast for territories and target accounts. Run forecast and other reports.

**Week 6**

- Manager supports implementation of territory plans; providing guidance and resources as needed.
- Assess TPP and sales reports, forecasts. Match to territory plans. Send guidance to appropriate territory managers, team members, and executives.
- Identify territories and accounts on-track and off-track to revenue and other objectives.
- Schedule and conduct territory plan reviews for off-track territories and accounts. Involve team members. Discuss challenges. Set action plan. Update territory plan.
- Schedule/ conduct sales calls on target accounts and opportunities. Identify next steps. Provide coaching.

**Week 7**

- Sales meeting: mid-course correction
  - o Tell the team about your plans to support activities for the rest of the quarter.
  - o Share one plan/success story- look for representative territory challenges. Territory manager discusses how territory plan/process has helped drive activity and results.
  - o Review a few other territory plans- presented by territory managers.
  - o Review usage report, TPP: Activities, Strategies by Plan report with team.
  - o Set the expectations re number of target accounts and opportunities that have a strategy in the territory plan by end of week 9.
  - o Give feedback to team regarding what needs to be done to meet expectations.
  - o Solicit feedback on resource requirements for quarterly implementation of plans.
  - o Review other reports in Salesforce.com, i.e. forecast reports.

**Week 8**

- Referring to your territory plan reviews and reports; generate an updated forecast.
- Conduct territory plan reviews on territories not yet reviewed this quarter or recently updated. Discuss challenges and provide guidance. Identify additional resources required. Set action plan. Update territory plan. Inform team members of update.

- Identify focus accounts, opportunities, and meetings needed for quarter close.

**Month 3: Close target opportunities, achieve territory objectives for this quarter**

**Week 9**

- Check progress on forecasted opportunities and update forecast.
- Review updated territory plans. Check TPP: Activities, Strategies by Plan report and TPP Goal and Amount reports to track progress.
- Meet with territory managers to gain consensus on end-of-quarter activities to achieve quarter's territory goals.
- Guide territory plan implementation with one-on-one meetings with territory managers.
- Conduct territory meetings and phone calls to close opportunities this quarter.

**Week 10**

- Check TPP reports and other reports in Salesforce.com to track progress on end-of-quarter activities in targeted territories, accounts and opportunities.
- Leverage all available resources. Make course corrections.
- Sales meeting: prepare to close quarter
  - Report on what is needed for quarter close.
  - Check progress on forecasted opportunities.
  - Establish activities required to meet quarterly territory objectives.
  - Establish the balance of activities; identify those territory plans and resources than can be deferred to next quarter.
- Meet with customer and partner leaders to move territory plans forward towards objectives.

**Week 11, 12**

- Check TPP reports and other reports in Salesforce.com to track progress on end-of-quarter activities in targeted territories, accounts and opportunities.
- Leverage all available resources. Make course corrections.
- Meet with customers to close important opportunities.
- Assign territory plan resources to key territories with significant opportunities.
- Provide leadership team with projection of quarter results.
- Meet with and manage territory teams to ensure they are executing on priority quarter closure activities.

**Week 13**

- Focus on activities to close territory, target account and target opportunity objectives for quarter.
- Check progress on forecasted opportunities and estimate quarter results. Compare to forecast.
- Check TPP: Activities, Strategies by Plan report and TPP Goal and Amount reports to track progress.