Sales Quota & Territory Worksheet

A simple way to set quotas tied to actual data, not guesswork or last year's number plus 10%.

Step 1: Look At The Real Numbers

Average deal size: ______________________

Average sales cycle length: ______________________

Historical close rate: ______________________

Opportunities a rep can realistically manage: ______________________

Step 2: Work Backward From Revenue Goal

Target revenue ÷ average deal size = deals needed. Deals needed ÷ close rate = qualified opportunities needed. That ÷ sales cycle = pipeline needed at any given time.

Step 3: Sanity-Check Against Reality

1. Is this territory/segment big enough to actually generate that many opportunities?
2. Is this achievable based on what similar reps have actually done?
3. What happens to the quota if a rep is new and still ramping?

Step 4: Write It Down Clearly

Quota: ______________________

Territory or segment definition: ______________________

Ramp period, if applicable: ______________________

What counts toward quota: ______________________