Sales Territory Planning Worksheet

Dividing territories fairly based on real data, not just historical habit or convenience.

Step 1: Inventory What You're Dividing

ACCOUNT / PROSPECT	LOCATION	POTENTIAL VALUE	CURRENT OWNER

Step 2: Choose Your Division Method

- [ ] Geographic (by region, state, or zip code)
- [ ] Account size (enterprise vs. mid-market vs. small business)
- [ ] Industry/vertical
- [ ] A combination of the above

Step 3: Balance The Territories

For each proposed territory, compare total potential revenue, number of accounts, travel time or accessibility, and mix of existing relationships versus new prospecting needed.

Fairness Check

1. Is any territory dramatically harder to hit quota in than another, without a good reason?
2. Are new reps given a realistic territory to ramp in?
3. Will reassigning territories break any existing, valuable relationships unnecessarily?

Transition Plan (If Reassigning)

- [ ] Timeline for handoff communicated clearly
- [ ] Warm introductions made for key accounts changing hands
- [ ] Clear cutoff date for who gets credit on deals in progress

Review Cadence

- [ ] Territories reviewed at least annually as the business and market change