



## How to Write a Sales Territory Plan

By Ron Snyder

### What are the critical steps in writing a successful Sales Territory Plan?

You may be wondering, “Where do I start?” The key is asking the right questions to harness the insights you need to create a winning plan. Use this checklist as a guide.

#### 1. Analyze your Territory/Business

Start with what is going on in your territory/vertical market.

- What are the key trends in your geography/ market?
- Who are your top prospects and customers?
- What are customers buying?
- Based on your conversion rates, how much business do you need in your funnel?
- What is the gap between what you need in your funnel and what you have now?

#### 2. Understand what Drives Customers to Buy

You must understand why they are buying or not buying your products.

- What are the characteristics of your high-payoff customers/prospects?
- Are there verticals that you are winning in more than others? Why?
- What “pain” or business issues do you solve?
- What compelling events drive the purchase?
- Are there specific products/services that you are selling more than others? Why?
- Why do they not buy your products/services?

#### 3. Clarify your Strengths, Weaknesses, Opportunities and Threats (SWOT)

Conduct a SWOT analysis that examines:

- What **Strengths** will you build upon? For example, a unique business model or capabilities.
- Which **Weaknesses** do you need to respond to? This includes the strengths of competitive and alternative solutions.
- Which **Opportunities** in your marketplace will you take advantage of? How do you uniquely meet your buyers’ compelling needs?
- What **Threats** in your selling environment will you defend against? Consider competitive moves, changes in technology, industry and regulatory standards.
- What is your unique selling (value) proposition?

#### 4. Determine your Objectives



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Consolidate the above trends into a few powerful objectives. Write specific, measurable goals (i.e. 'I will add 5 new accounts in this vertical market').

- Which vertical markets or geographies will you focus on?
- Based on the characteristics of your high-payoff customers/prospects, which accounts/opportunities will you concentrate on?
- What products/services/capabilities do you need to highlight in your plan?
- At your average selling price, how many opportunities do you need to add to your funnel?

## 5. Develop Strategies to Accomplish your Goals

Generate the top strategies to succeed.

- How will you further penetrate current accounts?
- What is your strategy to leverage current successes?
- What will you do to generate new leads?
- How will you improve your conversion rates?
- Where do you need to improve your selling process?

## 6. Engage the Resources you Need

Enroll the people and gather the knowledge you need.

- Which internal resources have the skills/connections you need?
- Who inside the account can help you win?
- Are there external resources that can support you (partners, people "in the know")?
- What additional product/industry information do you need? What sources can provide it?
- How could you improve your selling and territory/account management skills?

## 7. Create and Work your Plan

Use your plan as a guide to proactively produce your intended results.

- What are the high-leverage actions?
- Which resources are needed for each task?
- What are the due dates and key milestones?
- Do you take action and fine-tune the plan on a regular basis?
- Are you engaging your management, internal and partner teams?

"It's not the will to win that matters...everyone has that. It's the will to prepare to win that matters."

- Paul "Bear" Bryant

Creating and implementing a well thought-out plan greatly improves your probability of success!



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For more on this, refer to our new book, [PLAN to WIN; Strategic Territory and Account Planning](#). Go to

<http://www.territoryplan.com/resources/plan-to-win-book>

For complimentary white papers on Territory and Strategic Account Planning, go to <http://www.territoryplan.com/free-white-paper/>.



## About the Author

Ron Snyder

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As a sales and marketing consultant, for the past 21 years, Ron has helped companies dramatically improve their sales and marketing results in complex selling environments. Results include:

- ◆ Achieving sales targets
- ◆ Generating qualified leads
- ◆ Improving conversion rates
- ◆ Accelerating sales process velocity
- ◆ Controlling costs of sales and marketing



He has worked with industry leaders, such as HP, Cisco Siemens, Philips, Alliance Imaging, Synopsys, and rapidly-growing companies such as NetSuite, Zeus Technology and Zonare.

Prior to that, in his 11 years at HP, Ron was consistently recognized as a top performer in sales, marketing and management roles related to medical, computer and software solutions.