

## Territory Management Process

Version 7.0

### Business Issue

As the enterprise or large account market becomes more and more saturated, companies are looking at other ways to grow their business. Many are beginning to look at businesses in the mid-market with average annual revenues anywhere from \$50 to \$500 million as a target.

In order to ensure effective penetration and coverage of the mid-market, many companies are deciding to deploy a sales force organized around territories. Executed effectively, a territory sales organization allows the company to aggressively create streams of predictable revenue from entire segments of mid-market clients, rather than depending solely on one or two major competitive wins to meet their sales quota. The success of this approach depends on the ability of the territory manager to:

- Understand the dynamics of the territory (e.g. competitors, market trends, partners)
- Assess the revenue potential of the territory and prioritize sales efforts to capitalize on this opportunity
- Leverage resources to effectively cover and penetrate the territory

### What is the Territory Management Process?

The Territory Management Process (TMP) is a standardized, practical planning approach focused on helping sales professionals effectively cover and penetrate their assigned territories. The process is easily monitored and reinforced, and facilitates consultation between cross-functional groups and partner organizations. After completing this program, participants will have:

- Gained insight into their territory through detailed market analysis
- Identified high-impact, high-leverage sales and marketing activities
- Identified how to leverage relevant corporate, channel, and product marketing programs
- Planned ways to create revenue streams from new customers and market segments
- Created a draft plan for increasing revenue in assigned markets and developing necessary relationships

### What Are the Business Benefits?

- Faster identification of predictable revenue streams
- More effective utilization of resources
- Broader coverage and deeper penetration
- Prioritization of sales efforts for the best return
- Visibility for sales management into planned revenue objectives, activities, and critical success factors

## What Happens During the Territory Management Process Program?

**Length:** Two days

**Agenda:** During the program participants will:

- **Gain Insight into their Territory:** participants assess the factors that affect their ability to be successful in the territory
- **Identify Territory Growth Strategies:** participants will segment the territory and determine the highest potential value market segments to pursue
- **Leverage Partner Resources:** participants will determine how to leverage business partners to assist in covering and penetrating the territory
- **Leverage Marketing Resources:** participants will assess their territory to determine where they can leverage marketing to create customer interest and awareness
- **Select Market Segments:** based on an analysis of revenue potential, risk, and available resources, participants will select key market segments to pursue
- **Complete the Territory Plan:** participants will create a territory plan that includes a territory goal, revenue objectives and action plans that specify how they will achieve identified revenue targets
- **Identify Value:** for the chosen market segments, participants will determine the unique business value they can deliver
- **Review and Implement the Plan:** participants will receive feedback on their territory plans from their peers and identify next steps for successful execution

## Who Should Attend?

The program targets sales professionals who are responsible for generating revenue in geographic and/or vertical territories. The program is also designed to include cross-functional teams, such as partner account managers, product specialists, marketing support, and sales managers. The program can accommodate a maximum of eight territory teams or 24 participants.

## Implementation

In its sales process and methodology implementations, Siebel uses a proven change management approach for transferring new sales methodologies and sales skills to individuals and an entire organization. The OnTarget Implementation Architecture is a six phase approach to a complete sales effectiveness implementation designed to help minimize risk while maximizing the initiatives ROI. The six stages of the OnTarget Implementation Architecture include:

- **Business Analysis** – the implementation is mapped to the client's business needs
- **Management Alignment** – top to bottom managers are aligned behind the change initiative to help maximize ROI
- **Integration** – all pieces of the implementation are aligned and “plugged” together to ensure People, Process, and Technology are fully aligned
- **Deployment** – the new approach is deployed to the sales organization
- **Transfer of Ownership** – the client's sales managers and executives take ownership of the new methodology and tools
- **Management Review** – the performance of the initiative is measured based on the metrics identified in the management alignment phase of the implementation leveling across territories and sales teams



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