

Three MUSTS Before you Complete a Sales Territory Alignment

Confirm All Accounts and Zip Codes Have Been Assigned



It is imperative that you double check that every single account is assigned to a territory. If you even have one account that is missing then you can lose out on an entire year of sales. This could be millions of dollars depending on how big the account is. The AlignMix software will show you which accounts are not assigned and then automatically assign them to the rep in that area. Even if you aren't using AlignMix most alignment software will allow you to export the data so that you can double check and make sure that every account is assigned to a territory and a sales rep.

Use Input from First Line Managers

First line/district/region managers know their territories and accounts very well. Before you finalize any territory you must double check with them! They will confirm that all geographical situations are taken into account and that all territories are realistic. The first line managers will also make sure that all local relationships that are sensitive are maintained. How do you get this input? Well, it's recommended to do this in person with a manager. Never with all the managers at the same time. That will lead to chaos. You need work with each manager individually and evaluate each territory to make sure they are happy with it. Once the managers each approve all of the territories in each region you can move on to the next step and create buy in among the sales reps



Create Buy-In

Once territories are finalized by the first line managers they need to be checked by the actual sales reps. This is not a place to start making small changes so that a rep can get his/her favorite easy accounts. This is the only time any major changes can be made (with manager approval). Typically the only way a change can be requested is if the sales rep presents a solid case why they need a certain account. This comes back to double checking if all local situations are met. In this “creating Buy in” stage it is important to emphasize to the sales reps and managers that the territories are created for the company, so that the company can make more sales. These territories are optimized for this reason alone and not to make life’s easies for sales reps. Territories are optimized and balanced so that every territory has the same amount of work and sales potential. This also means that every sales rep ill now have an equal chance at receiving bonuses and reaching sales targets.

