

21st Date of the
Month (Year 2019)

Sales Territory Planning & Routing

Duration: 1 Day or 2 Days

Audience: Field and distribution sales persons



Overview

Your success as a field and distribution sales professional will ultimately depend on how efficiently and effectively you can manage your sales territory by building strong sales pipelines and advancing sales opportunities with a focus on growing relationships with key and high potential customers.

As a field sales person, you are accountable for the quality, direction and quantity of your sales activity within your territory. How well you plan and manage these three factors will ultimately decide your overall success. When territories are managed properly, key customer relationships are being grown, account plans and key sales opportunities are being advanced and sales territory targets are being achieved. This can only happen through structured territory business planning and proactively exploring territory growth.

This training programs aims to introduce a simple 5 step process to properly manage and plan your sales territory. The process serves as a plan or a guideline from setting strategic sales goals based on your close analysis of both your territory itself and scoring your customers for their potential to following best practice territory routing and coverage patterns and evaluating your results.

Course objectives:

By the end of this training course participants will be able to:

- Follow a structured step by step approach to plan sales activity within their sales territories.
- Understand the criteria for determining real customer potential
- Determine sales territory potential and assess strengths, weaknesses, opportunities and threats within the sales territory
- Set strategic objectives and goals for their sales territories.
- Explore best practice sales territory routing patterns for efficient and effective coverage.

<https://plantraining.wordpress.com>

Outline of topics:

Introduction: Quantity, Direction & Quality of sales

- ✓ My circles of influence and concern.
- ✓ Quantity, Direction & Quality.
- ✓ Being efficient and effective.
- ✓ Introduction – The 5 Step sales territory planning & routing

Step 1 : Sales Territory Analysis:

- ✓ Territory competition analysis
- ✓ Territory potential analysis.
- ✓ Sales Territory SWOT analysis.
- ✓ SWOT analysis skill practice activity.

Step 2 : Customer potential analysis and scoring:

- ✓ Key customer potential concepts.
- ✓ What makes a customer “Attractive”?
- ✓ Collecting information about customer potential.
- ✓ Calculating real customer potential.

Step 3 : Strategic Territory Objective:

- ✓ Why set goals and objectives?
- ✓ Setting strategic sales goals for your territory.
- ✓ Making sure your goals are **SMART**

Step 4 : Territory Routing & Coverage Management:

- ✓ What are territory routing patterns?
- ✓ Accumulating effort across your territory.
- ✓ Blocking your territory.
- ✓ Using territory routing software.

Step 5 : Measure, Evaluate & take corrective action where needed:

- ✓ Measuring and evaluating performance.
- ✓ Taking corrective action.
- ✓ Common sales activity time traps.

Competitive review game - *An Exciting review challenge (Power Point Game)*

The Training package includes:

- Pre-training assignment
- Examples and sales planning best practice
- Hands-on activities that use your own sales data
- Facilitator-led group discussions
- Contingency planning scenarios
- **Participant Reference Workbook**
- **PowerPoint Slide Presentation**

<https://plantraining.wordpress.com>