



SALES TERRITORY PLANNING AND ROUTING

OVERVIEW

The success of as a field and distribution sales professional depends on how efficiently and effectively they can manage their sales territory. It is important to build strong sales pipelines and advance sales opportunities with a focus on growing relationships with key and high potential customers.

Field sales people are accountable for the quality, direction and quantity of the sales activity within their territory. How well they can plan and manage this will ultimately decide their overall performance. When territories are managed properly, strategic or key customer relationships are grown through account plans. When the territory is structured using business planning and exploring territory growth proactively, field sales people advance key sales opportunities and they achieve sales territory targets.

This training programs introduces a simple five step process to properly manage and plan a sales territory. The process guides participants through setting strategic sales goals based on close analysis of the territory itself, scoring customers for their potential, applying best practice territory routing/coverage patterns, and evaluating their results.

COURSE OBJECTIVES:

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

- ✔ Use a structured step by step approach to plan sales activity within their sales territories.
- ✔ Explain 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.



TARGET AUDIENCE

Field and distribution sales persons

COURSE OUTLINE

INTRODUCTION: QUANTITY, DIRECTION AND QUALITY OF SALES

- My circles of influence and concern: quantity, direction and quality
- Being efficient and effective
- Introduction – the five step sales territory planning and routing

MODULE 1: SALES TERRITORY ANALYSIS

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

MODULE 2: CUSTOMER POTENTIAL ANALYSIS AND SCORING

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

MODULE 3: STRATEGIC TERRITORY OBJECTIVE

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

MODULE 4: TERRITORY ROUTING AND COVERAGE MANAGEMENT

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

MODULE 5: MEASURE, EVALUATE AND TAKE CORRECTIVE ACTION WHERE NEEDED

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

COMPETITIVE REVIEW GAME

Duration: 2 Days

Delivery methods:

- Self-discovery and critique
- Group exploration and facilitator led discussions
- Practical exercises
- Best practice theory exploration



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