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Sales Territory Management

A Definitive Guide to Expand Sales Coverage

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Introduction

Sales territories are fundamental to business strategy, and effective territory management improves customer coverage and boosts overall sales.

This comprehensive ebook will help sales leaders and managers design, plan, and execute a winning sales territory plan.

Chapter 1

What is Sales Territory Management?

Sales territory is a particular geographical area of a set of prospects or customers that are assigned to sales executives. Sales territory management includes dividing territories into manageable segments and helping the outside sales team cover them effectively.

The main objective of sales territory management is to identify and define boundaries for the optimum utilization of resources and to improve overall sales performance and coverage.
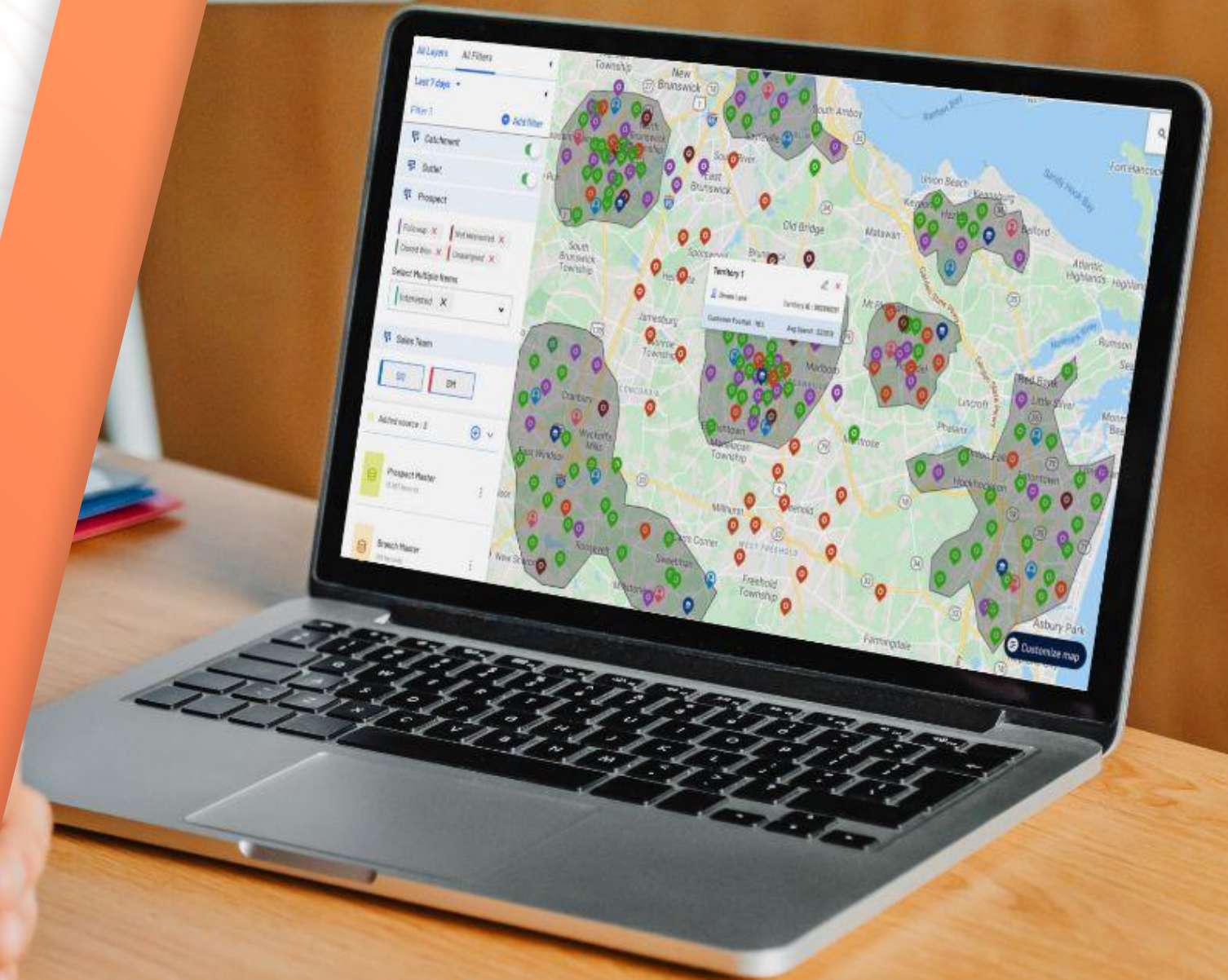
Chapter 2

The Challenges:
Sales Territory Planning

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Territory design is complex. Ineffective territory plans result in
loss of productivity and high operational cost.

Here are some key challenges businesses need to combat to improve territory performance.

Sticking to traditional geographical boundaries

Gaps between territories

Ineffective customer profiling

Unbalanced territories

Overlapping of areas and reps

Lack of visualization and insights

Ineffective territory assignment

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Chapter 3

The Need:
Sales Territory Planning and Management

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A 2018 survey by the
Sales Management Association (SMA)
stated organizations with an effective
territory design had a **14%** higher sales
objective achievement than the average.[1]

With sales territory planning, sales leaders
can streamline resource allocation, target
specific markets, and boost rep productivity.

Let's understand why enterprises need to focus on sales territory planning to make the most of their territories.

Set SMART Goals

It helps you set realistic targets and track the progress of your goals. An effective sales plan helps sales managers review their progress and realign strategies to achieve their goals.

Build Stronger Customer Relationships

Strategically manage territories by matching sales reps with potential and existing customers based on specific characteristics like personality and customer lifecycle.

Strategic Territory Coverage

Select the suitable territories and manage resources to improve sales coverage. Ensure equitable distribution of work to reach maximum customers.

Optimize Sales Rep Efficiency

Boost sales rep productivity by aligning them with the right territories and helping them spend more time selling.
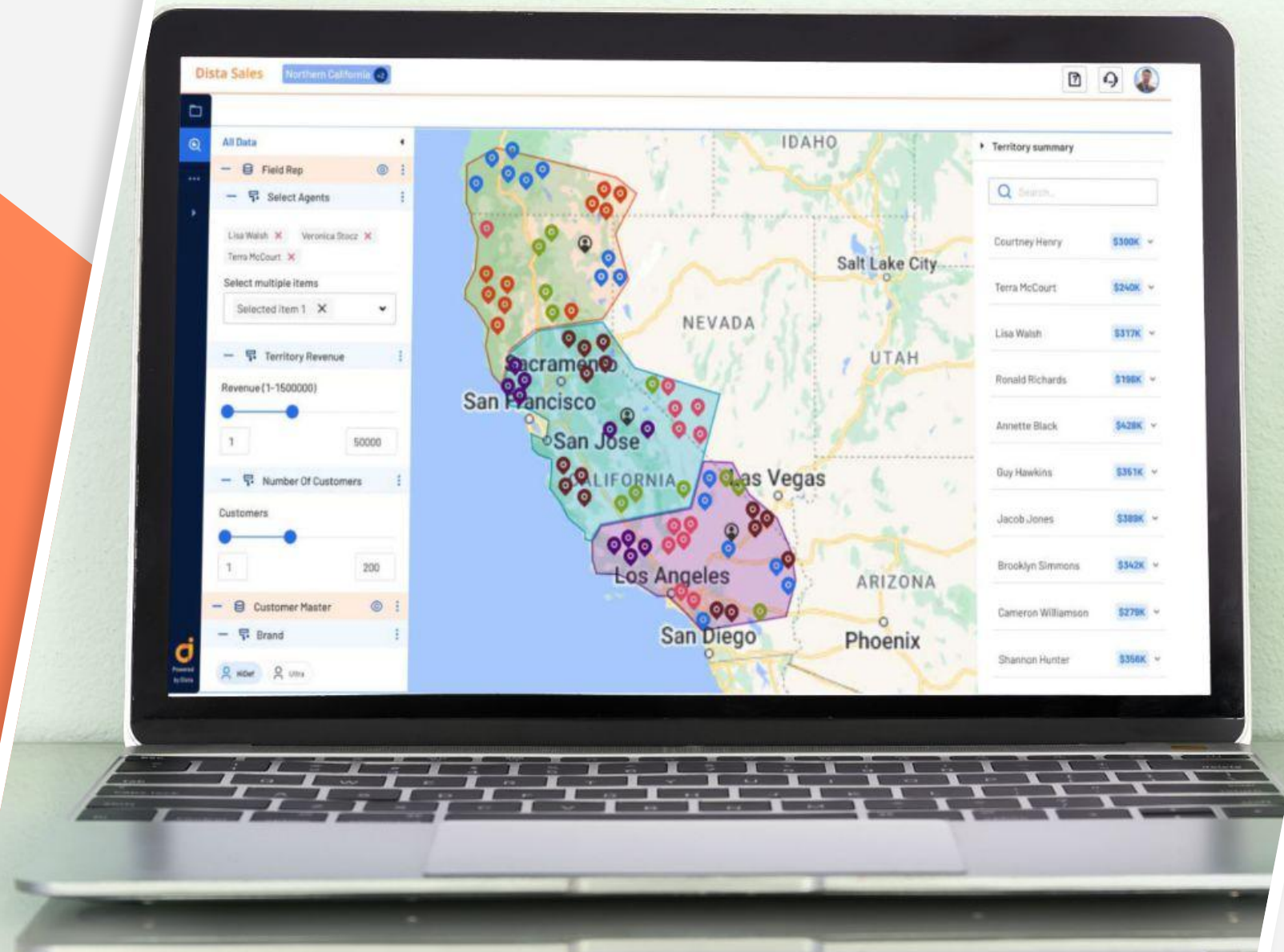
Chapter 4

9 Key Features:
Sales Territory
Management Software

A Harvard Business Review report states, optimizing territory design can **increase sales by 2-7%** without any change in total resources or sales strategy [2].

By leveraging a **territory management solution** like Dista, you can enhance and strengthen your territory design.

1

Area Categorization

Use data-driven insights to design area segmentation, fix overlaps, and remove coverage gaps.
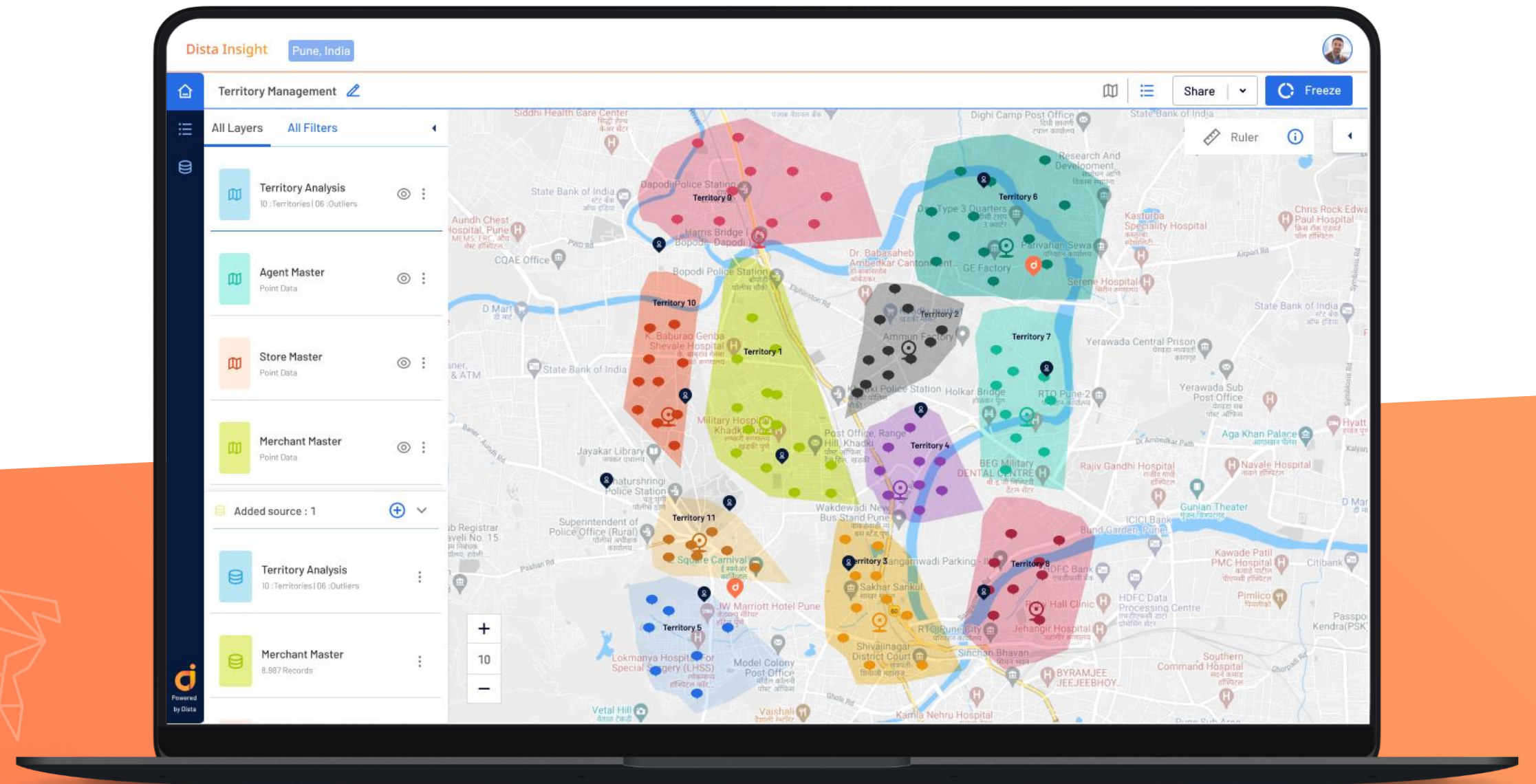
2

Cluster Analysis

Design location clusters within territories by zip codes, customer, and lead density, and pair it with Point of Interest (PoI) data for better decision-making.
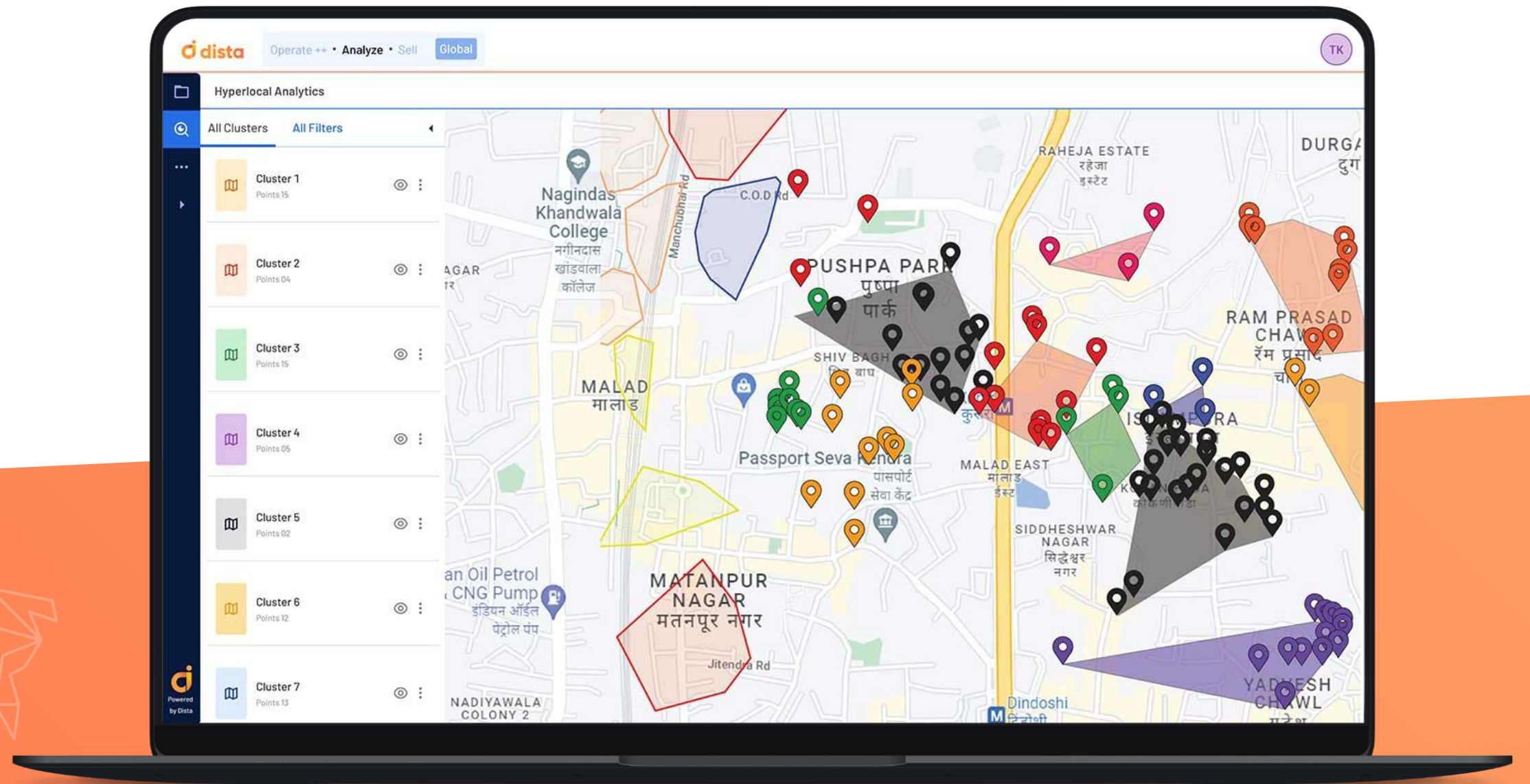
3

Territory Alignment

Align territories with the right field sales rep using multiple business rules. Customize the territory plan to suit your business needs by leveraging 150+ variables. Align the right territory with the right sales rep.
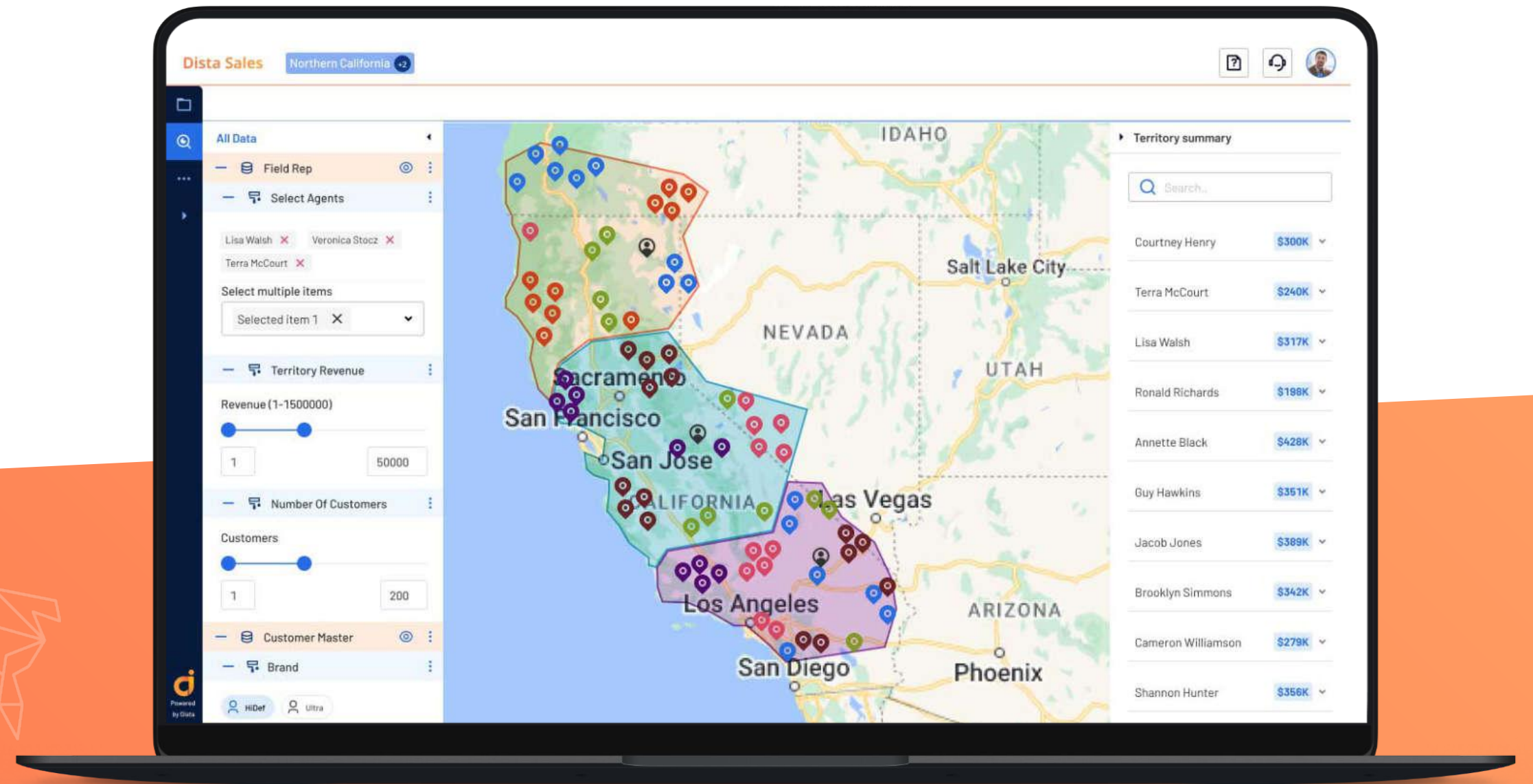
4

Territory Performance Management

Get detailed insights into territory performance. Gain visibility into every sales activity. Set, measure, and compare the performance of each territory.
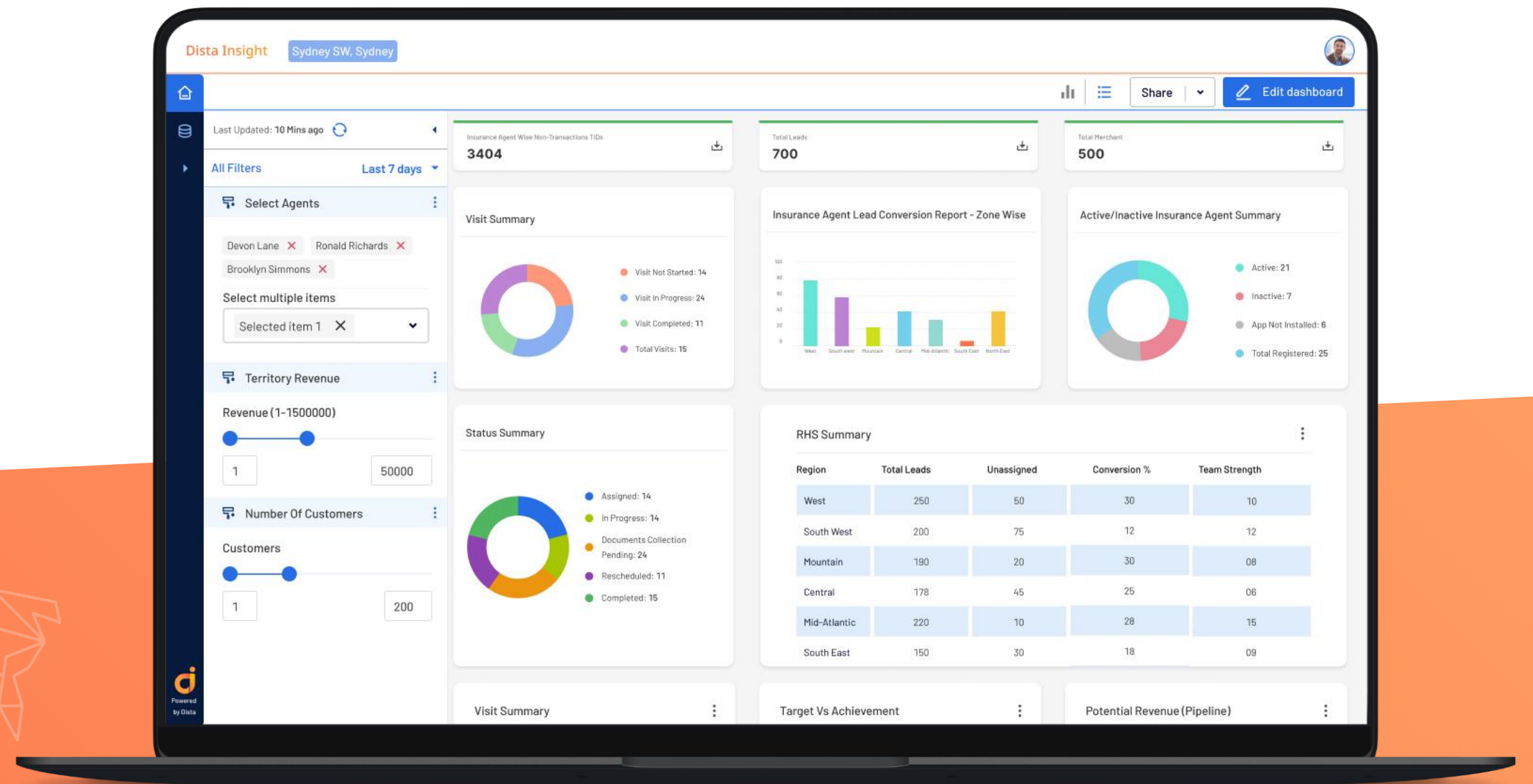
5

Market Intelligence

Discover new opportunities by uncovering new trends and identifying patterns within territories. Analyse these patterns to get actionable insights and improve selling outcome.
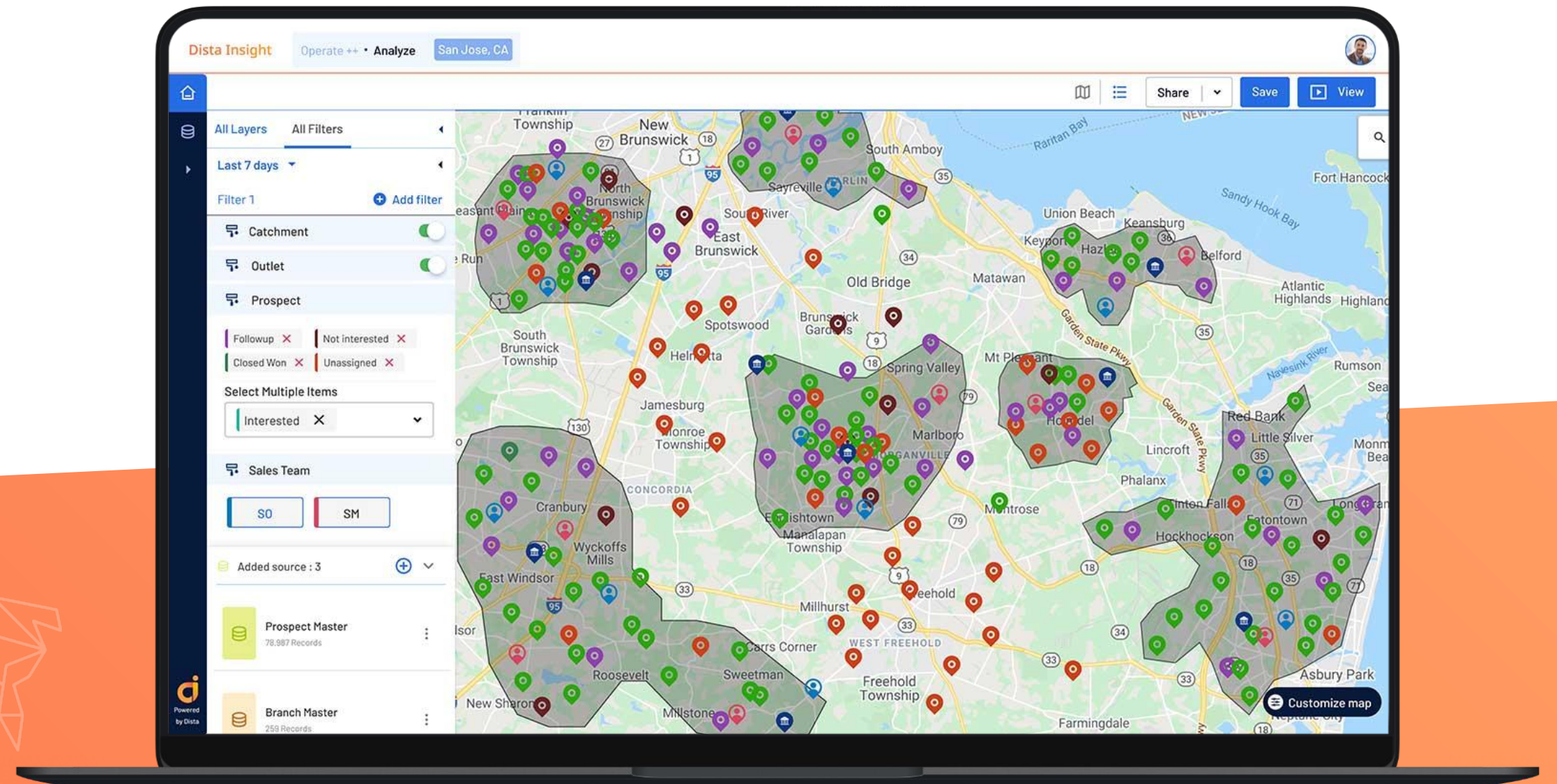
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Predictive Analysis

Design and modify sales territories using predictive analytics. Gain foresight to set realistic sales territory goals and forecast projections.
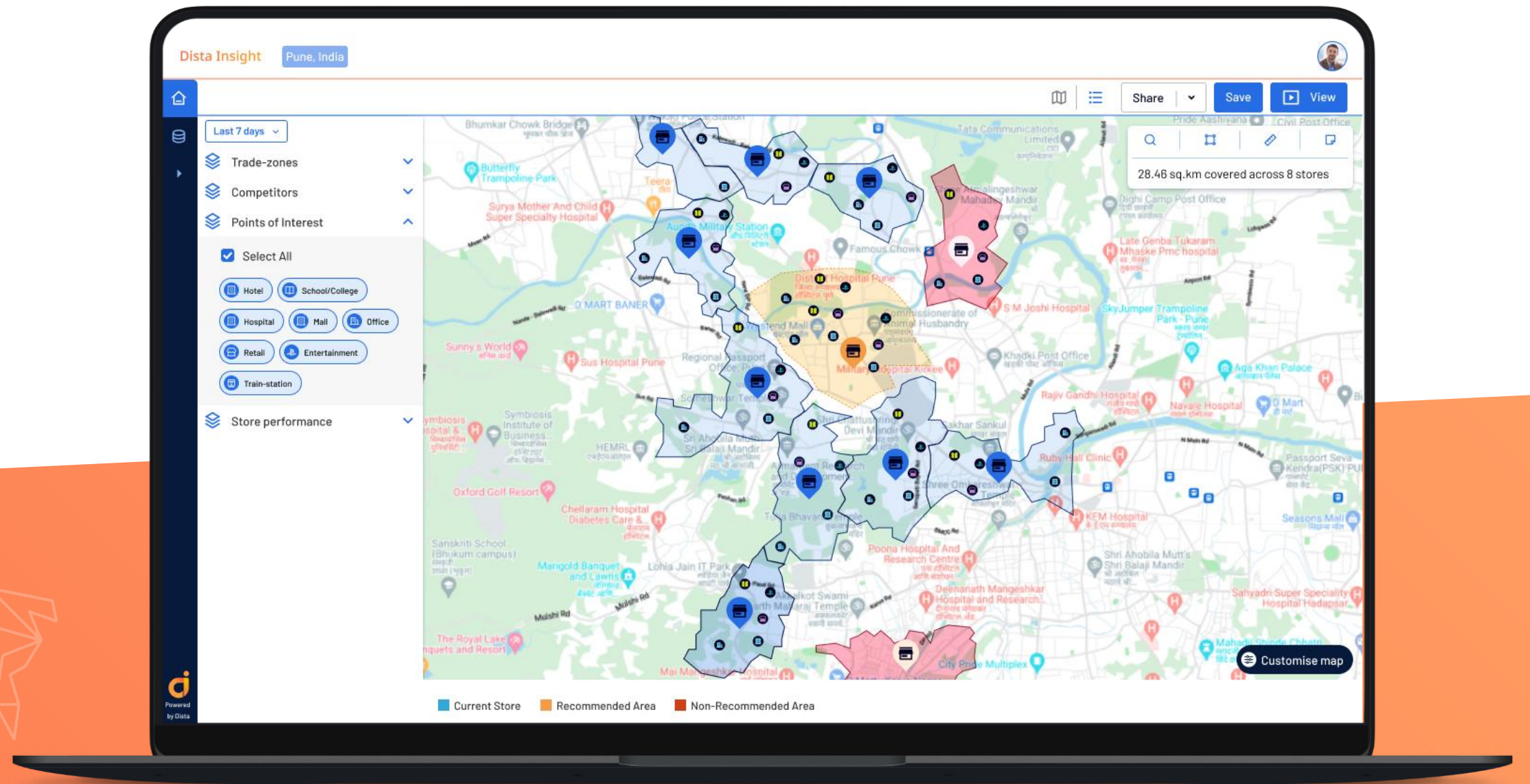
7

Sales Resource Optimization

Balance the territory plan with equitable lead and customer distribution. Maintain optimal sales workload balance to avoid over or under hiring.
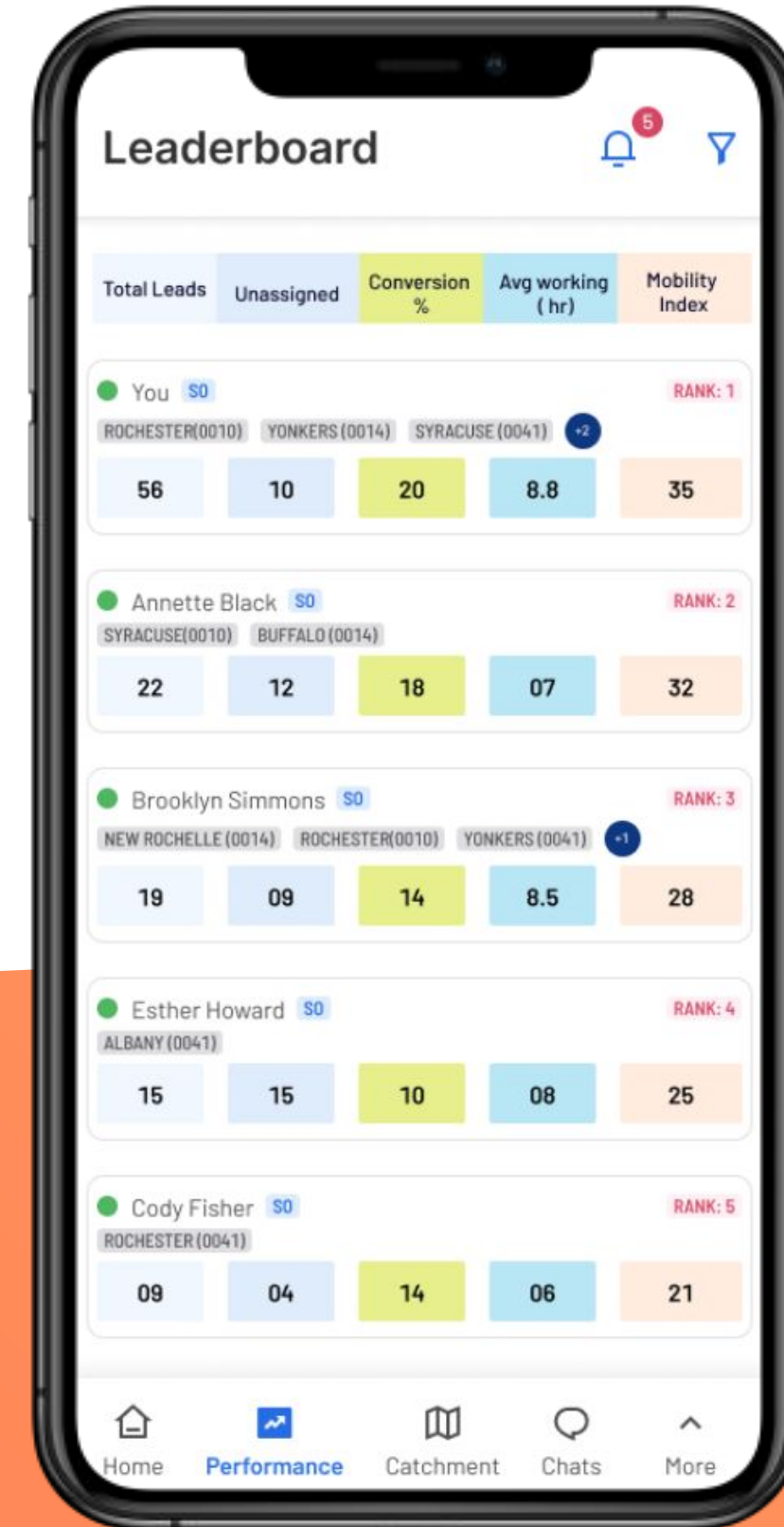
8

Nearby Lead Alerts

During sales visits, notify sales reps with leads near their location and increase selling opportunities.
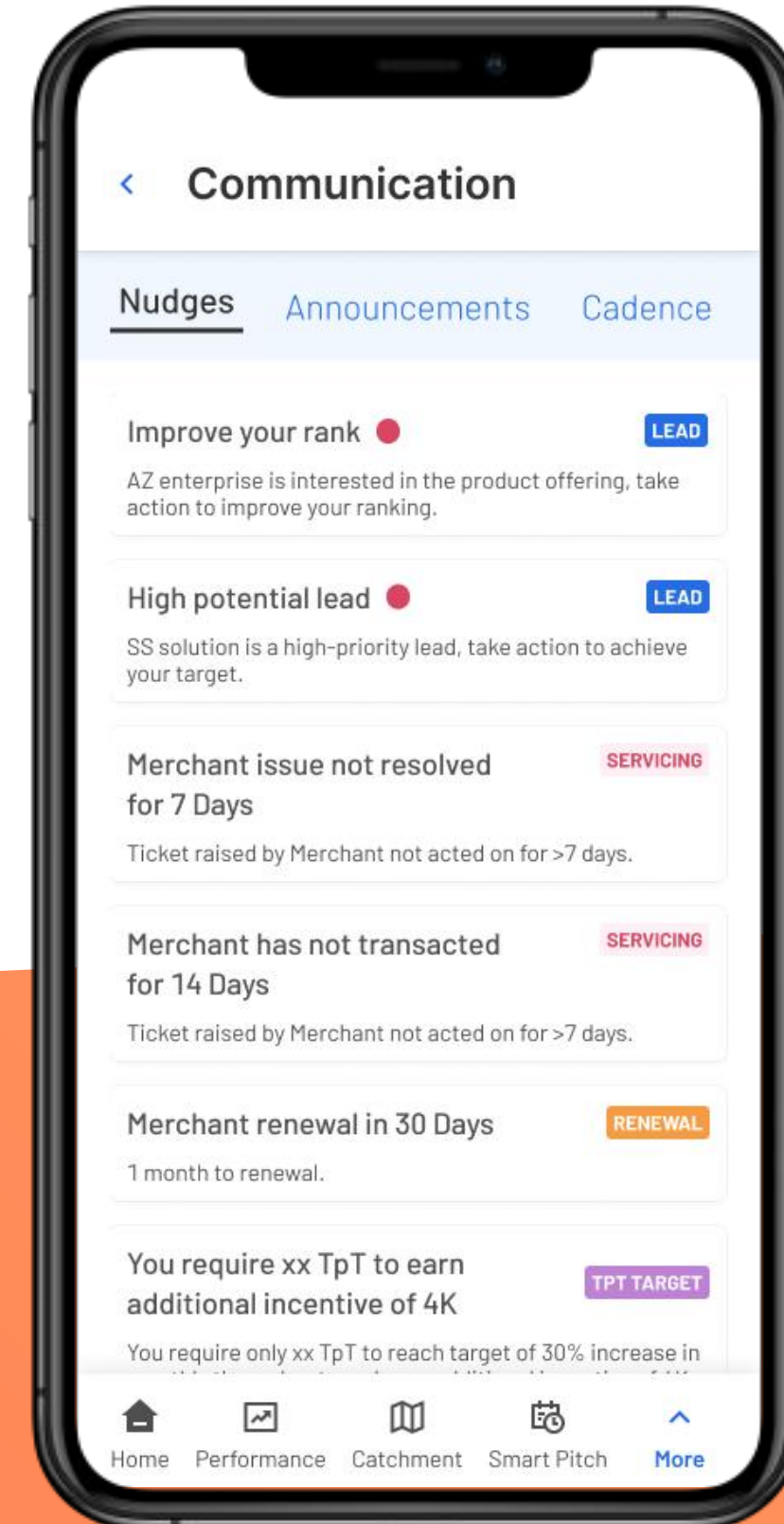
9

Geo-hierarchy Management

Define organizational hierarchy by territory and assign access as per roles and responsibilities. Enable information sharing between relevant functions and hide sensitive data.
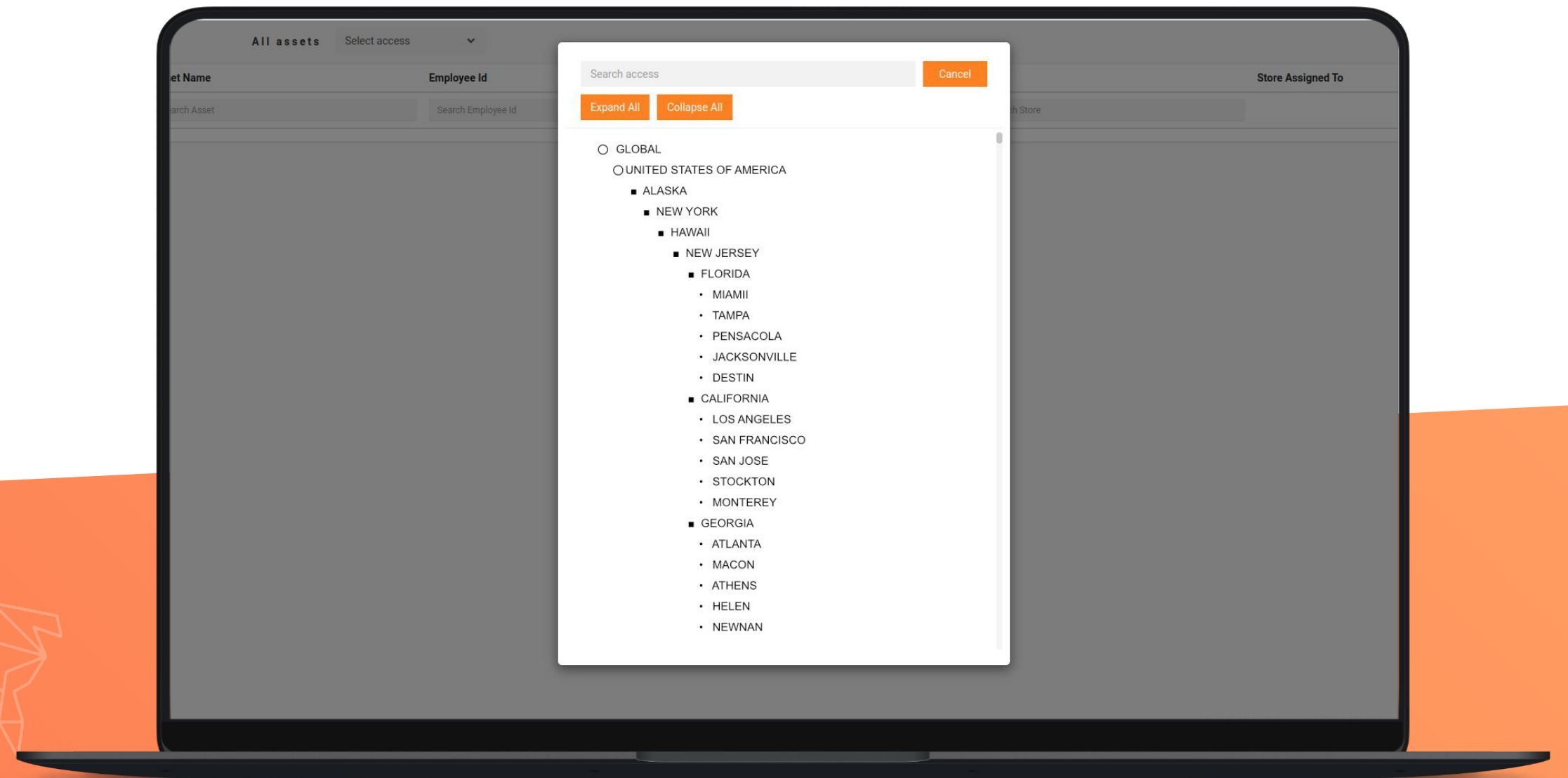
Chapter 5

The Benefits :
Sales Territory Management Software

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Only **36%** of organizations use territory management in an effective way.

Meanwhile, **64%** of them are either only somewhat effective or are completely ineffective.[3]

Hence, having a comprehensive sales territory plan is mission critical!

Benefits

Amplify Cost Efficiency

Aligning territories to the right sales rep reduces travel time, improves fuel efficiency, saves travel costs, and increases the number of sales meetings in one trip.

Improve Your Topline

The right territory alignment helps with better lead engagement, resulting in faster account closure, thereby improving your top line.

Optimize Sales Routes

Design optimal routes within territories to reduce travel time, save fuel cost, and improve sales visit frequency.

Maximize Sales Coverage

Effective mapping of territories to sales reps balances workloads and maximizes sales coverage. Optimal lead distribution helps eliminate coverage gaps and enhance sales.

Boost Rep Productivity

Balanced territory design optimizes sales workload and equips field sales reps to better serve customers. Carve intelligent beat plans and optimize routes for higher sales productivity.

Intelligent Insights

A robust sales territory management software offers AI/ML-based insights and recommendations on overall territory performance. This helps define and refine sales strategies.

Balanced Workload

Territory planning software automatically balances leads, accounts, etc., by considering your business constraints and variables.

Chapter 6

Step-by-Step Guide to Create a Sales Territory Plan

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Let's look at key steps to create a sales territory plan that empowers sales leaders and helps them use their resources effectively.

01

Identify and Set Goals

Identify and define your business objectives and set measurable, specific, and achievable targets. Creating a measurable sales strategy that aligns with the company's vision is critical before designing your territories.

02

Analyze and Segment Customers

Divide and segment your target audience into groups based on geographic boundaries, economic, and behavioral demographics, etc. This helps in tailoring strategies for each segment and strengthens sales efforts.

03

Evaluate Competition

Conduct a territory-wise competitor analysis and understand their strengths and weaknesses. Assess them with factors like product pricing, use cases, market positioning, reviews, and more.

Set Benchmarks

04

Set benchmarks to evaluate performance standards that measure progress towards achieving your goals. Evaluate the effectiveness of the territory plan by leveraging the benchmarks as checkpoints.

Develop Sales Strategy

05

Leverage intelligent insights and develop a powerful inside and outside sales plan that aligns with your sales goals. Refine and realign your sales strategy with new data.

Allocate Resources and Assign Territories

06

It's time to allocate sales resources to defined territories. Balance and distribute resources evenly to cover sales areas effectively.

Chapter 7

Tools You Need for Sales Territory Planning

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Let's look at key software you can use to improve
rep productivity and boost lead engagement.
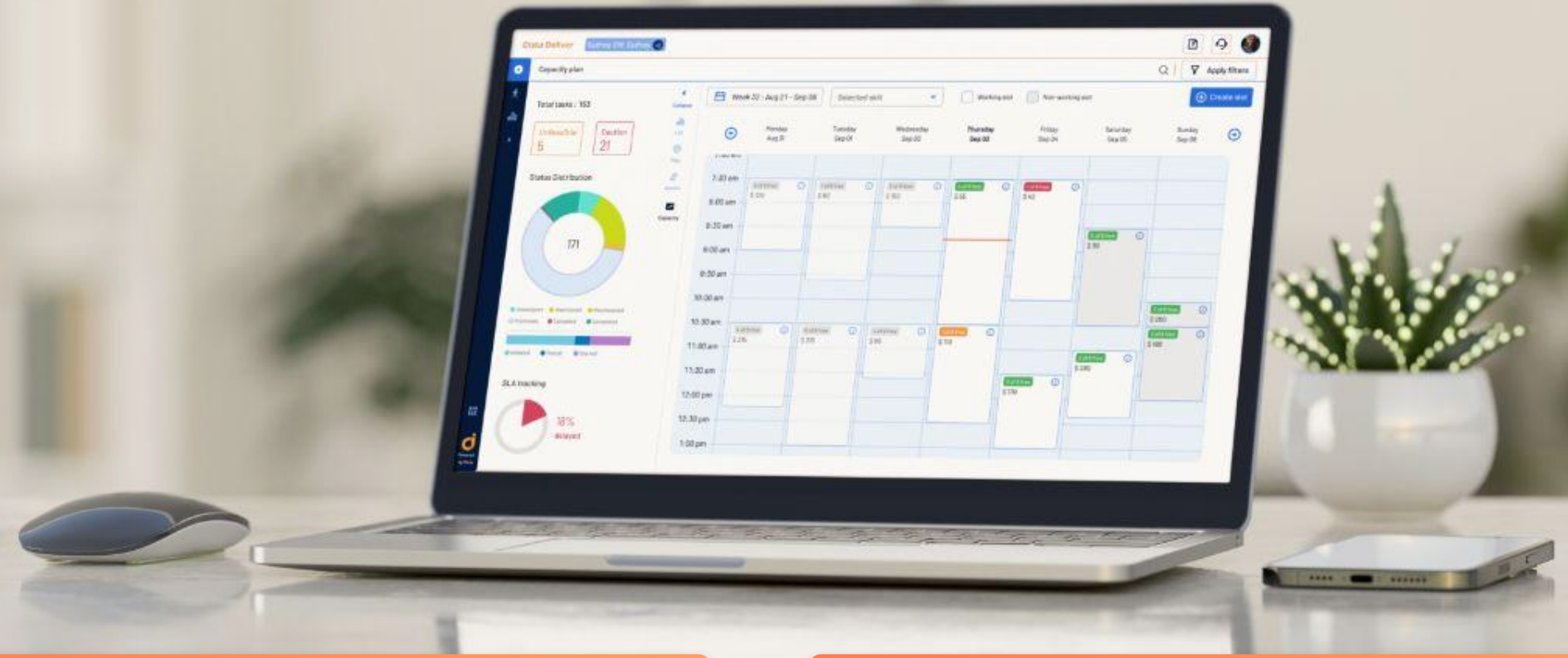
Territory Mapping Software

Visualize territories and get valuable insights to identify gaps and tweak your territory planning to improve coverage area. Align territories to boost sales efficiency.

Field Sales Management Tool

Manage and track sales teams and empower them with the right tools to boost productivity. Measure the sales performance of individual sales reps and teams.

Field CRM

Track customer information and keep sales activity records. Compile data and get automated sales reports and detailed analytics from multiple sources for better sales decisioning.

Chapter 8

Best Practices for Sales Territory Management

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Balanced sales territory plan identifies new opportunities and boosts performance.

Now that we understand how to create one, let's see some of the best practices to follow.

1. **Focus on New Leads**

   Prioritize the most valuable territories by assigning them to your top sales reps. Also, remember to go beyond existing accounts and engage with high-value potential leads.
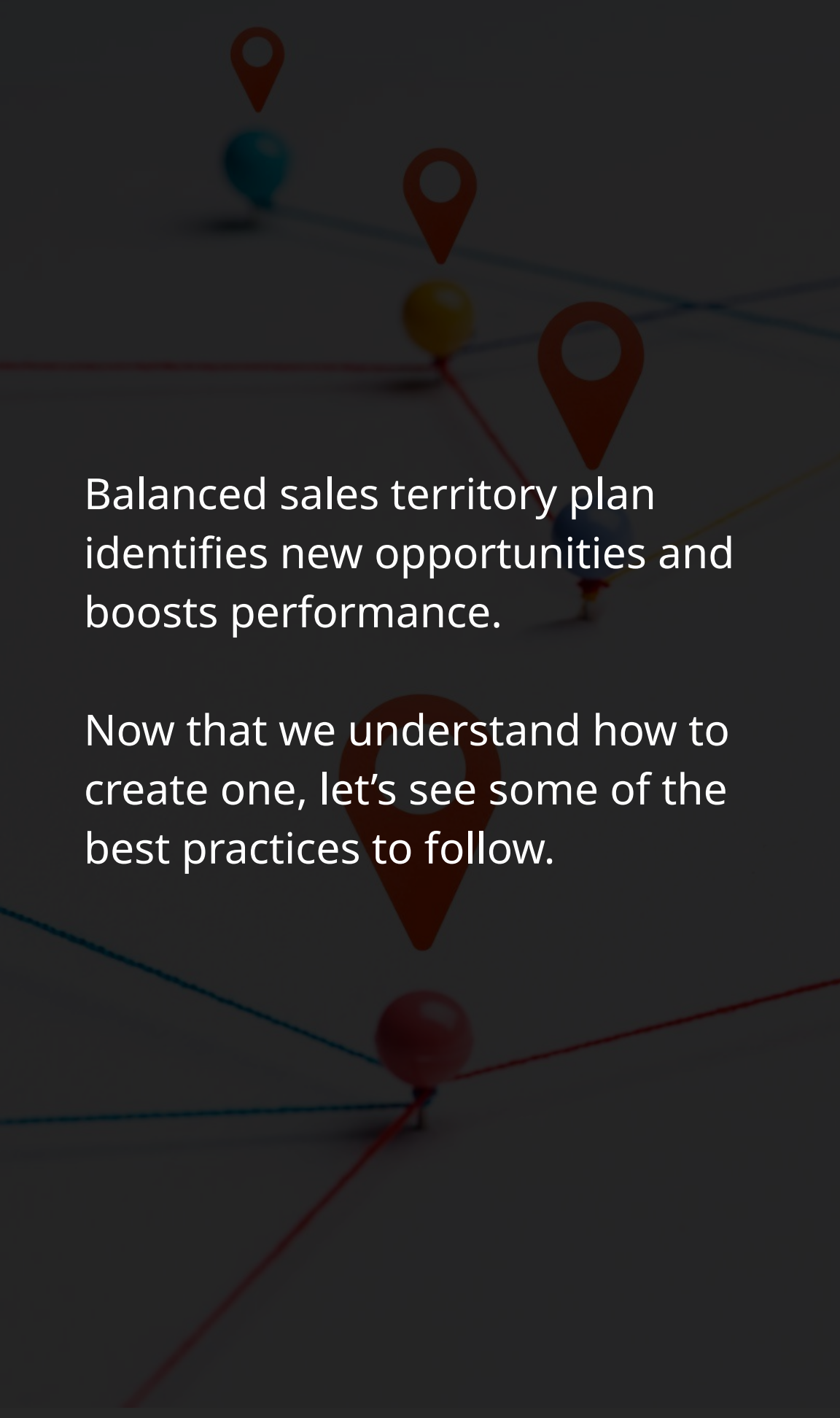
2. **Upsell and Cross-sell**

   Engaging with systematic and intentional upselling and cross-selling is a great strategy to grow your bottom line. Make it a part of your sales reps' beat plan.

3. **Rotate Sales Rep Schedules**

   Run AI-driven scheduling algorithms to set up timely follow-ups and never miss an opportunity to improve selling outcomes.

4. **Boost Rep Learning and Development**

   Conduct training sessions and workshops to improve sales rep skills that will help boost their performance and reach their targets.

5. **Review Territory Plan Regularly**

   Monitor key metrics to analyze territory performance regularly to learn what's working. Reassess and tweak strategies for territories that are underperforming.
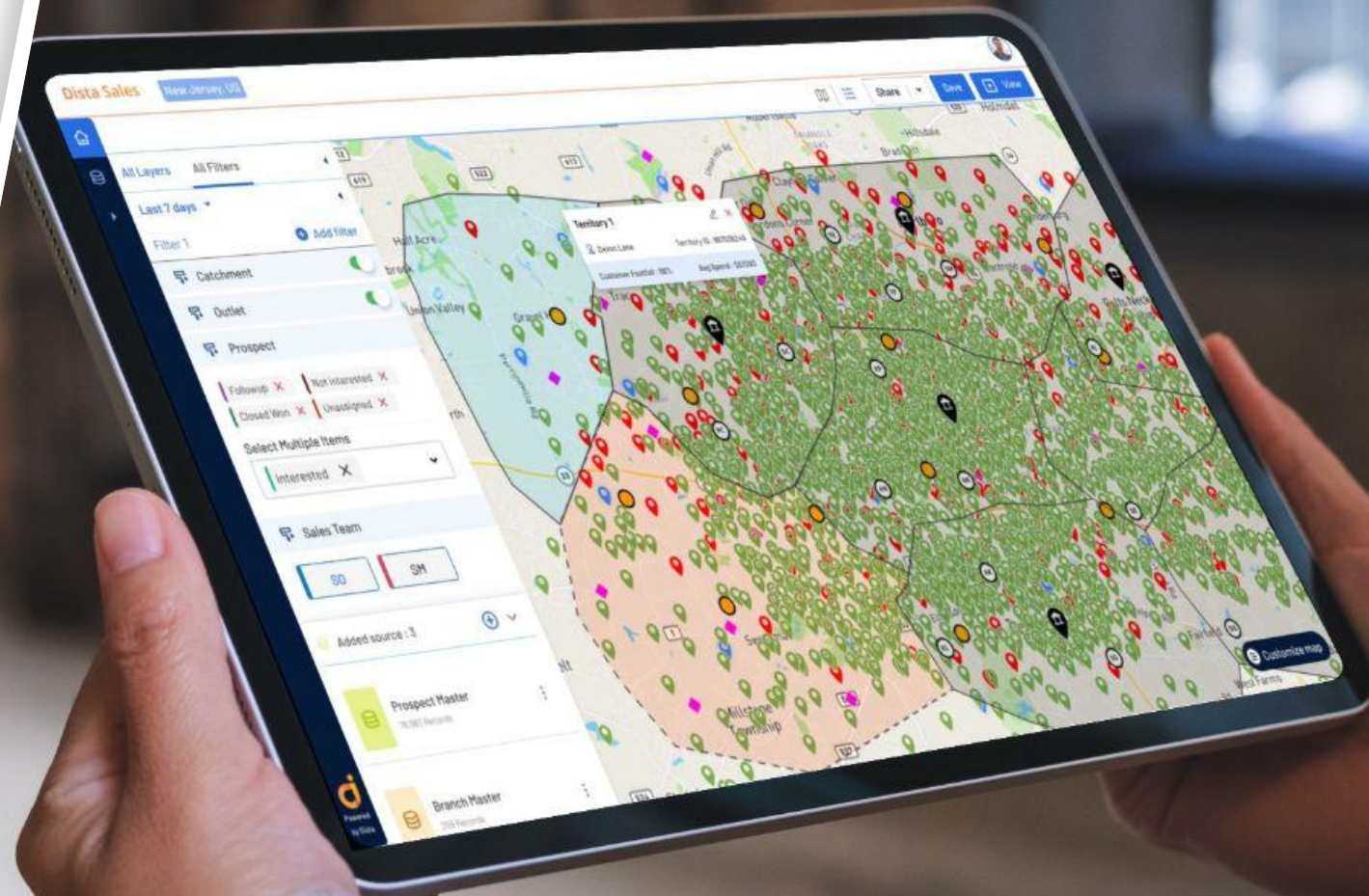
Chapter 9

Leverage Dista to Build a High-impact Sales Territory Plan

Define, design, organize, and **balance** sales territories with Dista's **sales territory management** software. Our comprehensive tool helps sales leaders discover untapped opportunities with optimal territory planning.

Take your territory planning to the next level with **Dista**. Get in touch with us for a free quick demo to see our sales territory management software in action.

And if you need to speak with a field sales solutions consultant, schedule a time on the calendar.

Schedule Now 📅

Key Resources

Customer Success Stories

Consumer Packaged Goods Major Improves Sales Territory Planning with Dista Insight

Multinational Fast Food Chain Improves Delivery Efficiency With Dista Deliver

Global Pizza Chain Leverages Dista Insight and Dista Deliver for Market Expansion and Delivery in India

Read More

Free Territory Management Kit

The Complete Sales Territory Management Kit

The Sales Territory Planning Checklist

The Complete Sales Territory Planner Tool

Dista Overview

Dista is an AI-enabled location intelligence platform. Our custom SaaS products are built on our own low-code/no-code platform, employing several in-house, patented and patent-pending algorithms.

Dista's location intelligence framework helps business leaders **Visualize, Strategize, and Operationalize** their field operations.

Leverage our robust location intelligence platform to

Increase revenue and enhance service experience

Get geospatial analytics and visualization for advanced insights

Boost operational efficiency

Visualize [Monitor]

❖ Collect, ingest, and visualize your geospatial data
❖ Get contextual analytics from overlapping visual data layers

Strategize [Plan]

❖ AI/ML-based algorithmic analysis
❖ Perform simulations
❖ Uncover at trends and patterns

Operationalize [Execute]

❖ Finalize outcome for operational roll-out
❖ Action insights by easy integrations
❖ Orchestrate field operations to achieve maximum efficiency

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The 'Dista' Platform

Industries	Financial Services & Insurance	CPG	Food & Beverages	Transport & Logistics	Energy & Utilities	Retail & Ecommerce	Healthcare & Pharma	Telecom	Services
Products	Dista SALES	Dista SERVICE	Dista DELIVER	Dista INSIGHT	MORE TO COME	MORE TO COME	MORE TO COME	MORE TO COME	
Biz Solutions	Salesforce Management	Field Service Management	Delivery Management	Geospatial Analytics	Fleet Management	Market Expansion	Network Optimization	Ride Management	Cash/ Collections Management
Core Components	Scheduling & Routing	Auto-clustering	Asset Tracking	Capacity & Skillset Mgt	Task Management	Territory Management	Collaboration Engine	Smart Nudges	Geospatial Visualization	Customizable Dashboards
Framework	Mobility Platform	Template Engine	Workflow Engine	Event Framework	Processor Engine	Reporting Engine	Integration Framework	White Labelling	Recommendation Engine
Technology	Google Cloud & Google Maps Platform								

Dista platform

Author
in Sneha Bokil

Designer
in Anchal Jena