

Territory Management

Territory Design



The Safe Choice

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How do we get there efficiently?



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You can't effectively do Value (Needs) Based Selling without time spent on the Customers floor.

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What are some formats used by you?

- Geographical
- Account Specific
- Major Accounts
- Combination

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What is the recipe?

- Consists of 4 concentrations of Customers/Prospects in your territory.
- Each concentration has 5 smaller segments called Territory Management Units.
- The territory management system now has 20 small territories within your territory boundary.
- You can now begin to set up your call pattern to accommodate the 20 segments.

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M	T	W	Th	F

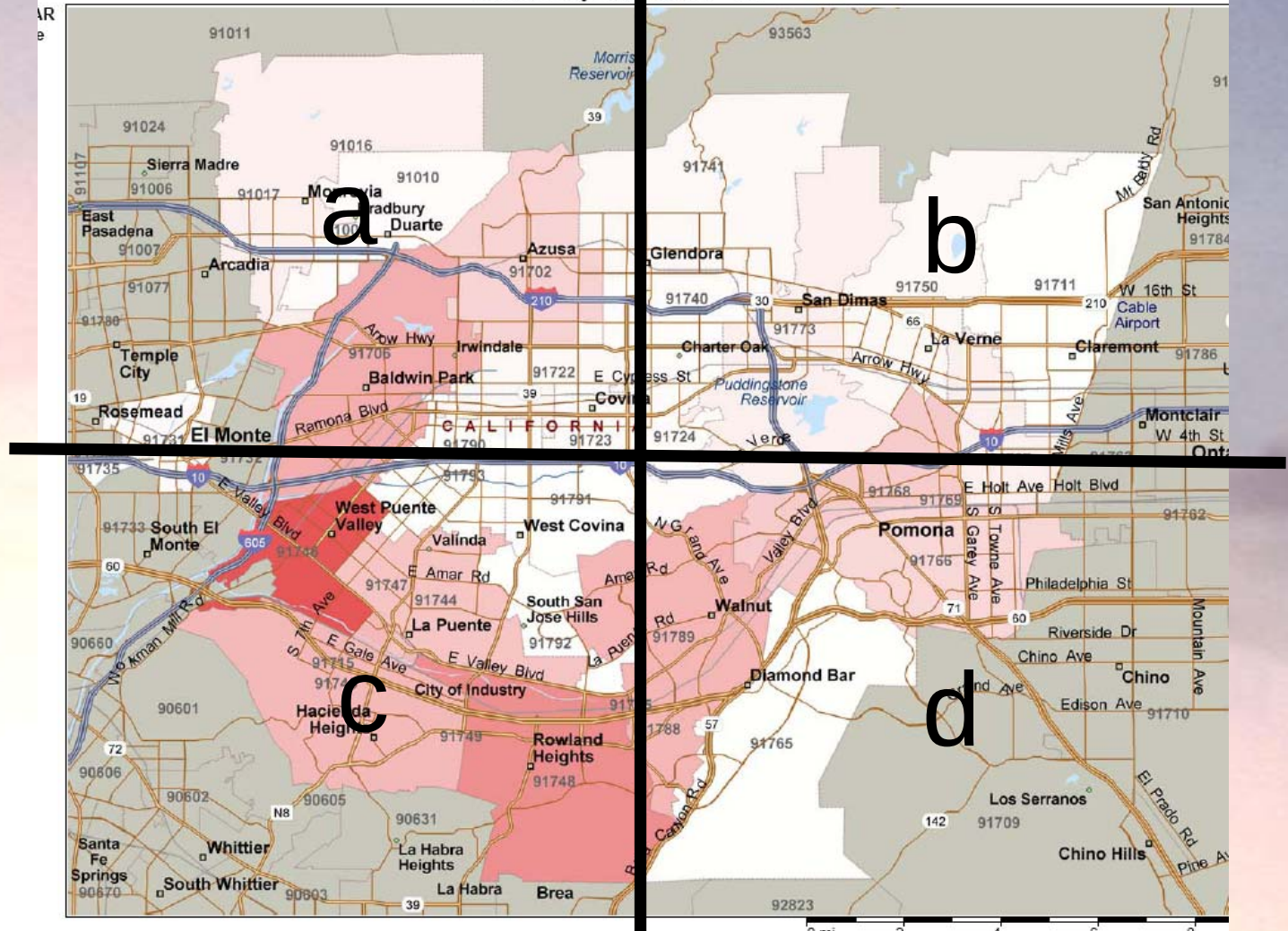
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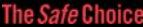
How do we set up the System?

- Break down your Data Base by zip code.
- The goal is to have an approximate equal number of customers and prospects in each of the four concentrations.
- Locate the zip code on a map and enter the number of customers and prospects in it.
- Do this for each zip code in your territory and then through visual analysis determine what boundaries within your territory will give you four balanced concentrations.
- Identify the 4 concentrations, for example [a b c d]

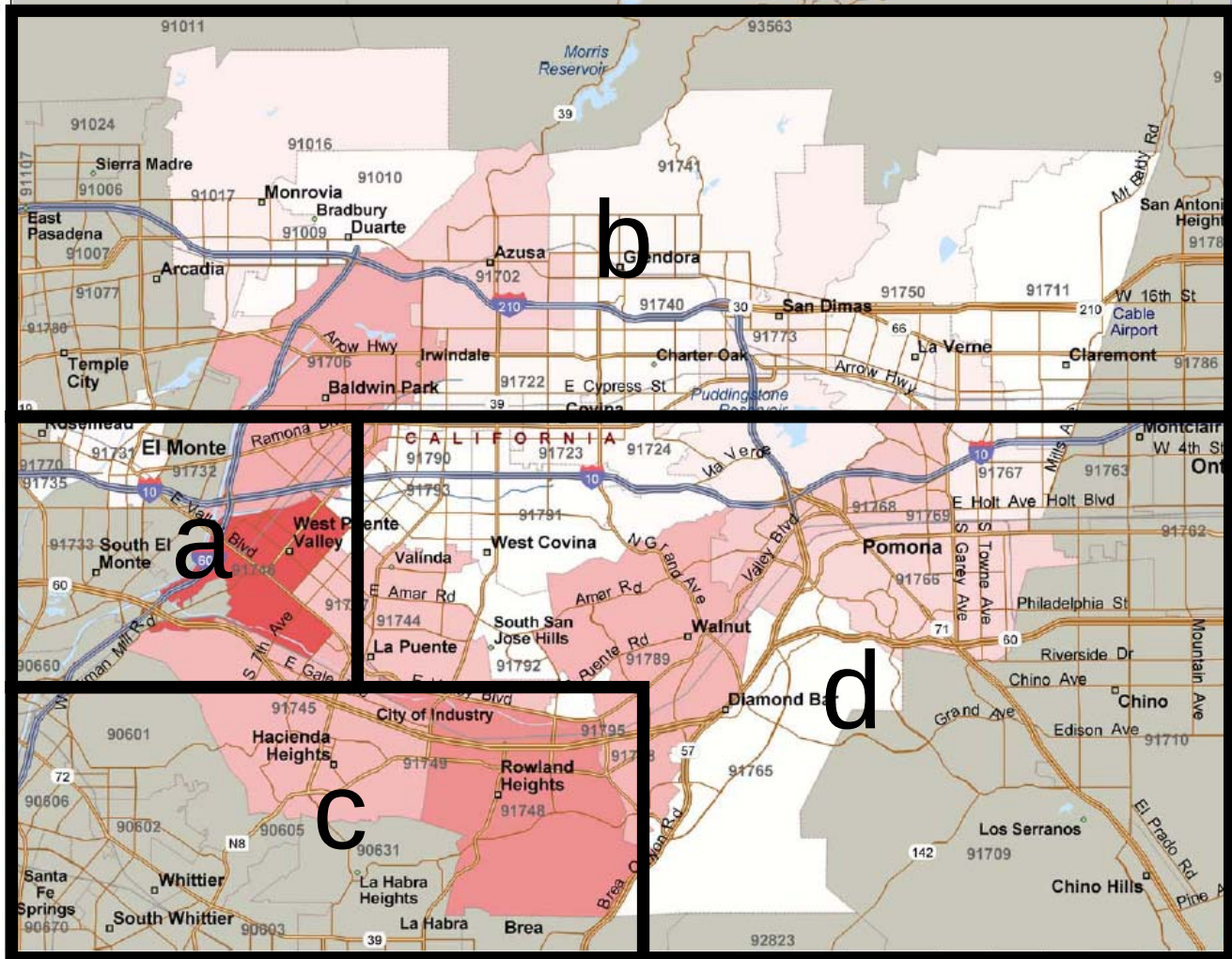
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CALLS by ZIP Code - 08





CALLS by ZIP Code - 08



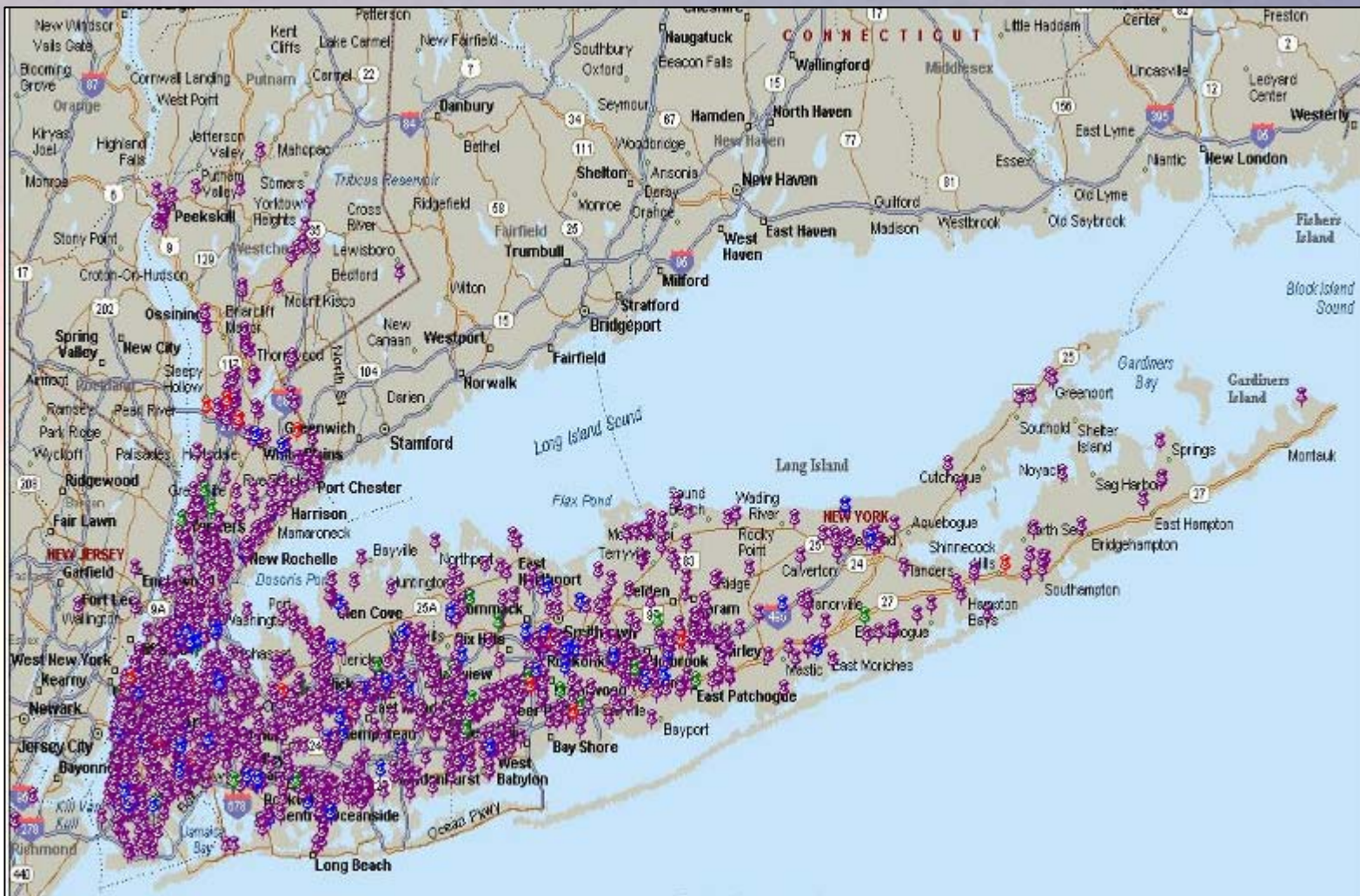
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- When possible. try to get a balanced distribution of A and B accounts in your concentrations and individual Territory management units.
- This process can be done manually as described or through the use of MAPPING SOFTWARE.
 - Real World exercise tomorrow
- Regardless of the set up method, **execution of the plan is the KEY!**



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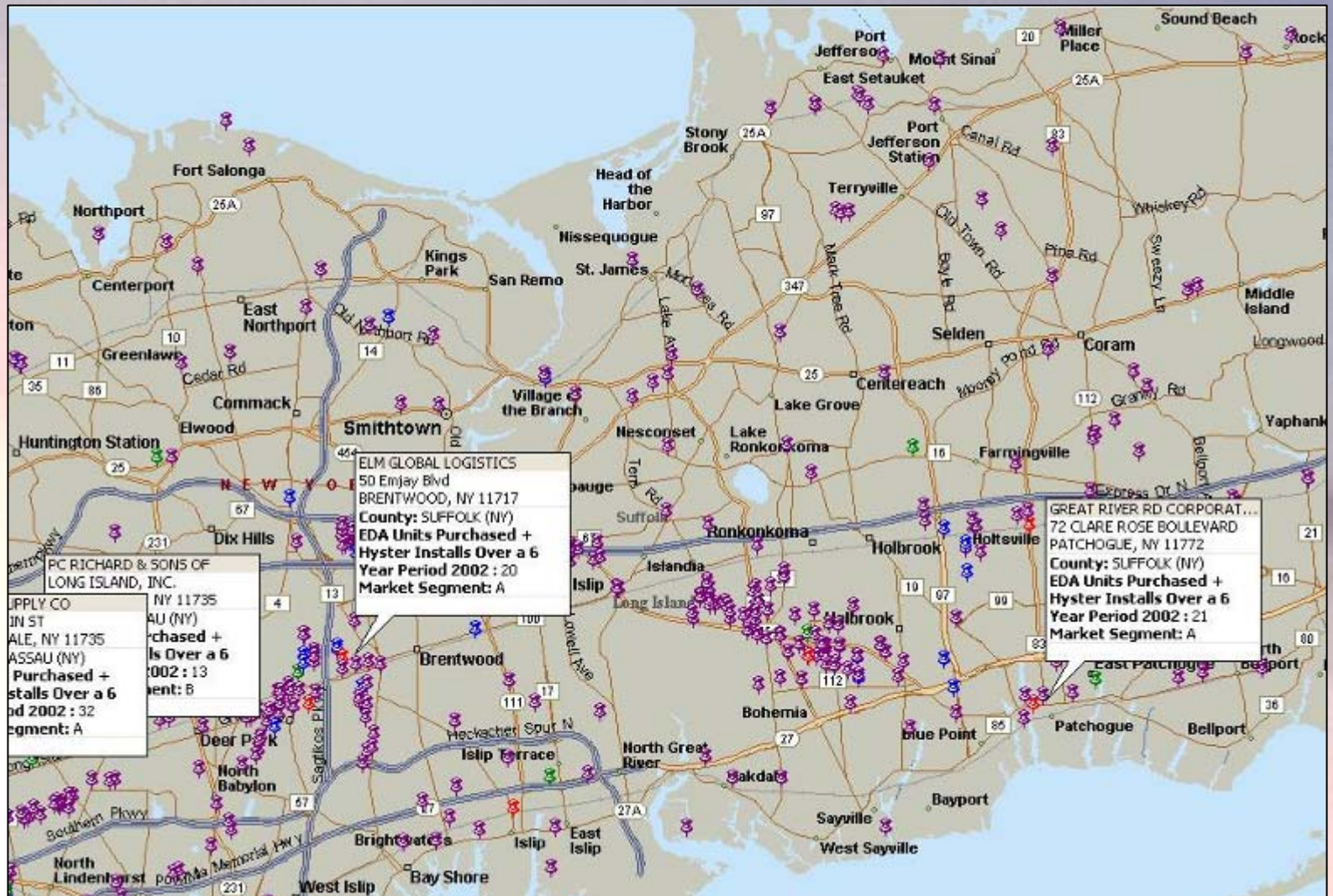
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- Within each concentration, a numerical notation for each Territory Management Unit (TMU). 1 2 3 4 5
- For example concentration A would have 5 TMU's
 - a1 a2 a3 a4 a5.
 - The same for b1 b2 b3 b4 b5
 - So on for c and d.
- A field should be designated in Contact Management System (e.g. Goldmine) to identify the proper TMU for each Customer and Prospect.

Company: Steelcase Incorporated
 Contact:
 Dept: Last:
 Title: Dear:
 Source: Asst:

Address: 1040 40th St
 :
 :
 City: Grand Rapids
 State: MI Zip: 49503
 County Name: Kent Merge:

Summary Fields GM+View Notes

LT Salesman: Jerry

LT Territory: B3

ITA Class: C2, C5

Purchase Prob

Multi Locations: Yes

Used Equip Pros:

Lease Exp.:

- A1
- A2
- A3
- A4
- A5
- B1
- B2
- B3**
- B4
- B5
- C1
- C2
- C3
- C4
- C5
- D1
- D2
- D3
- D4
- D5

Lookup window...

LT Prim Supp: Crown

LT Maint: In-House

1: (616)243-7524 Ext:
 2: Ext:
 3: Ext:
 4: (616)246-4253 Ext:

Product Type: LT
 Sheet Size: LTb
 SIC: 25
 Number: E526978
 RO Link:

Generals Pending History

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- To get on the “Path to Success” set up your calendar for the month with a systematic rotation through the 20 TMU’s.

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M	T	W	Th	F
a1	b1	c1	d1	a2
b2	c2	d2	a3	b3
c3	d3	a4	b4	c4
d4	a5	b5	c5	d5

	23	10:30a Robert Point	24	8:45a Quality Stores Sarah Seams	25		26	8a wolverine: safety manager 10a Old Orchard: Howard Veltman 1:30p Challenge manuf: Steve Jones 3:30p used truck: S Abrahams & Sons
		B1		C1		D1		A2
	5	8a Bay Logistics: Harold Timmerman 11a Textron --used truck: Mary Casey Sally Saheb	6		7	1p S Abrahams & Sons Incorporated 1p Universal Truss: Eric Maxey	8	8a Maint. Review: Kellogg Co 10a Steelcase survey: Gary Graeff 1:30p H50 quote: Home Acres Bldg
		C2		D2		A3		B3
Frank Mayo/ fleet review: Acemco	12	8:30a James Gunley: L Perrigo	13	11:30a Columbian Dist: Bill Eckburg 2p Haviland Products: Richard Garner	14	8a James Shannon: Meridian 10:30a Mary Adams: Finishmaster	15	10a Doug Wiggins
		D3		A4		B4		C4
Mannesman Dematic: Charles Ramsey 30a Herman Miller Incorporated	19	7:45a Tower Automotive	20	8a Spartan Stores 10:30a Johannes Hofman 1:30p Zondervan	21	8a Total Logistics	22	8a Meet & Qualify: Rick Hutchins
		A5		B5		C5		D5
Old Orchard: Howard Veltman	26	8a Michigan Turkey: Tom Plainville 1p National Nail: Robert Point	27	8a Eric Maxey 8:30a Meet & Qualify: Sarah Seams	28	1p Greg Bos	29	9a Steve Jones
		B1		C1		D1		A2
	3		4	8a Heinz USA: Clarence Becker	5	8a Mannesman Demag	6	9a Support: James Smith

Outcomes

- Maximizing use of your selling time.
- Maximizing time spent with the 70% club.
- Managing your relationship with all customers and prospects more effectively.
- Getting more efficient output from your support people with better scheduling of needs and fewer crisis calls.
- Urges you to look at progress being made with strategically important prospects.
- Helps you control your market.
- Helps you bring order to your personal life.