CONCEPT

Sales Territory Management and Route Planning: Territory Design, Call Cycles and Territory P&L

31 May – 4 June 2027
London - Central London four-star



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Introduction:

Sales territory management often fails quietly: some field representatives drive past high-potential accounts while others cannot reach every assigned customer, call frequencies ignore account value, and quotas bear little relation to what each territory can yield. This Core Concept course gives sales managers and field sales staff a practitioner method to estimate market potential, segment accounts, design balanced territories, plan call frequency and visit routes, and track territory profitability. Participants build a Territory Plan and Route Schedule for a case region, ready to adapt to their own patch.

Course Objectives:

- Estimate market potential per territory from account counts, buying power and current share of wallet
- Design territories that balance potential, workload and travel time, and size the field headcount they need
- Set call frequencies by account tier and build journey plans and visit routes that cut unproductive driving
- Allocate territory quotas and read a territory P&L and cost-to-serve analysis to decide where visits pay back
- Run territory reviews from CRM data and apply realignment rules when accounts, people or markets change
- Produce a Territory Plan and Route Schedule for a case region and adapt it to an own territory

Target Audience:

- Area and first-line sales managers responsible for dividing accounts among field representatives
- Field sales representatives who plan their own weekly visits and carry a territory target
- Sales operations and planning staff who maintain territory maps, account lists and CRM data
- Route sales and merchandising supervisors who set visit frequencies and monitor call coverage
- Business development staff opening new geographic areas or customer segments

Course Outline:

Day 1: Territory Foundations, Market Potential and Current-State Audit

- Territory Unit Definitions: Postcode Clusters, Trading Areas and Named Account Lists
- Market Potential Estimation Using Account Counts and Buying Power Indices
- Account Segmentation Grid by Potential and Current Share of Wallet
- Current Territory Audit Workbook: Coverage Gaps, Overlaps and Travel Hours
- Territory Imbalance Symptoms: Uncalled Accounts, Overloaded Representatives and Idle Capacity

Day 2: Coverage Models, Territory Design and Workload Balancing

- Coverage Model Selection: Field Visits, Telephone Cover and Hybrid Account Tiers
- Workload Build-Up Method: Call Time, Travel Time and Administration Hours
- Territory Design Principles: Balanced Potential, Balanced Workload and Compactness
- Territory Mapping With GIS Layers and Drive-Time Isochrones
- Representative Home Base Placement and Headcount Sizing Calculation

Day 3: Call Frequency, Journey Plans and Route Sequencing

- Call Frequency Matrix by Account Tier and Visit Purpose
- Weekly and Four-Week Journey Plan Cycle Construction
- Route Sequencing Using Travelling Salesman and Nearest-Neighbour Heuristics
- Customer Time Windows, Appointment Slots and Visit Duration Standards
- Route Planning Software and Mobile Field Apps: Features and Data Inputs

Day 4: Territory Targets, Profitability, CRM Reviews and Realignment

- Territory Quota Allocation From Potential, History and Account Growth Plans
- Territory P&L Statement: Gross Margin, Field Cost and Contribution
- Cost-to-Serve Analysis by Account and Minimum Visit Economics
- CRM Territory Review Dashboard: Call Plan Adherence, Coverage and Revenue per Visit
- Realignment Triggers and Account Transfer Rules That Protect Customer Relationships

Day 5: Case Region Territory Plan and Route Schedule Build

- Case Region Data Pack Review: Account List, Sales History and Road Network
- Territory Boundary Redesign and Workload Balance Test for the Case Region
- Territory Business Plan Drafting: Priority Accounts, Growth Actions and Targets
- Route Schedule Build for a Four-Week Cycle With Drive-Time Check
- Territory Plan and Route Schedule Presentation With Peer Challenge

Skills You Will Gain:

- Market Potential Estimation
- Account Tiering
- Territory Alignment
- Workload Modelling
- Journey Planning
- Route Sequencing
- Cost-to-Serve Analysis
- Territory Performance Review

Why Attend This Course:

- Return with a Territory Plan and Route Schedule built on a case region and ready to adapt to your own accounts
- Replace habit-based visit patterns with call frequencies and routes justified by account value and drive time
- Show management, with territory P&L evidence, which accounts deserve field visits and which suit lower-cost cover
- Compare territory structures with peers from consumer goods, industrial supplies, medical devices and building materials

Conclusion:

A well-designed territory sends every field hour where the revenue potential is. The course moves from market potential estimation and a current-state audit, through coverage models, workload balancing and territory mapping, to call frequency, journey plans and route sequencing, and then to territory quotas, P&L, cost-to-serve, CRM reviews and realignment. The final day brings these methods together on a case region, producing a Territory Plan and Route Schedule that participants can reuse at their next territory review.