

Territory Action Plan

Purpose

Without a Territory Plan, it is easy for any sales person to miss key targets on their territory, lose control of expenses, waste time travelling excessive distance, forget to follow-up on key customers and fail to maximise customer contact time. All field sales professionals need a plan to maximise customer contact, plan their sales activities and take control of their territory.

Territory Action Plan

The following is a brief and greatly simplified summary of TAP – call for more info if needed.

1. **Map your territory** and clearly mark the boundaries (physical or IT map – either works)
2. Identify customers by group (prospect, existing, dormant/closed, or by sector, or by type)
3. **Colour code and label** the customers & target prospects that you put on the map
4. Immediately you book an appointment, use the map to identify other customers nearby
5. Contact them and arrange an appointment before or after the original appointment

Balance visits to existing customers with visits to new prospects or dormant customers

Balance visits to customers of one type with visits to others

or

If taking demo/towed equipment, use the map to target the appropriate customers for the same eqpt in the same area or areas along the route to the first appointment

Diary Management

Break the week into **half-day blocks & use a mindset that you have 10/11 blocks per week**

Start some days with a **customer visit in the field** and work back into the office if possible

Leave **contingency time in one block each day** so that you can respond swiftly

When responding to **short-notice calls – check the map and drop in on nearby customers**

When to use it

Try to make this approach to territory management a habit.

Combine it with targeted conquering for a simple and effective way to GROW market share, whilst PROTECTING existing business.