



## Sales Territory Planning Checklist

Use this checklist as you're reviewing your team's territory plans. Check off all items that are true.

- Each seller has a *written, defensible* case for beating the sales plan by 20%
- Sellers have psychological ownership of the plan (it's 'theirs' not 'yours')
- Seller has confirmed they believe the plan is achievable
- The math used to achieve the plans is defensible; would stand up to scrutiny
- Annual plans are broken down into quarterly objectives
- Team members are aligned with the right accounts, opportunities, and markets
  - For greatest seller success
  - For greatest customer success
- The mix of inbound and seller-generated leads is reasonable and defensible
- All sections of the RAIN Sales Territory Planning Tool are filled out; if skipped, it was a conscious choice
- Differences in sales cycle metrics—such as sales cycle time and win rates—are accounted for regarding inbound leads vs. outbound prospecting generated leads or other relevant factors (e.g., large sales taking 4 times as long as small ones)
- Seller skill or knowledge training to succeed against their plan is identified and actioned
- If plans are achieved, seller compensation expectations would match reality
- Seller territory plans across the team are defensibly equitable
- Seller action plans for territories are organized to be as time efficient as possible