Sales Territory & Quota Planning Checklist

1. Understand your quota process and territory distribution

Document the steps, methods, governance, owners and approvers

Document how territories are currently distributed (by customers, geography, product, market value, prospects, etc.)

2. Understand what is working and what is not

Collect the past years opportunity data available in your CRM. (A precursor to this could be to make sure your sales reps, etc. get all their opportunities and pipeline data entered accurately so it can be used for analysis.)

Analyze your data by asking:

- How does individual attainment vary over periods? Compare this with the business.
- What ‘biases’ are impacting overall performance? Test for areas of high variance, disconnect between individual and business performance, impact of small goals, historical influence and the role of guesswork by management in the quota process.
- What is the cost to serve the territories?
- How do different groups perform in comparison to each other?

3. Based on your findings in the quota process and data analysis determine what can be improved for 2016-2017.

4. Create account plans for the new year.

5. Reconcile your plan against overall corporate goals and identify any gaps between the two. Formulate a methodology (or reuse one) by using the data you have available to determine where in your organization you have the most potential to create opportunities (outside of the set of already known/identified opportunities).