**Territory Sales Plan**

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Purpose

The objective of this document is to capitalize on the information resulting from the approach to the territory. Who are the company's customers, how do they respond to requests and what are the assets that make it possible to enter a new account?

This document is evolving.

In the process of entering a new territory, it is essential to rely on concrete elements based on experience. We need to figure out who the company's potential customers are and how to get their attention.

Assessment

***Company Profile***

Our Company is ….

***Current customers***

***In territory***

List current clients in territory ….

***In other territories***

List current clients in other territories ….

***SWOT Analysis***

|  |  |
| --- | --- |
| **Strengths** | **Weaknesses** |
|  |  |
| **Opportunities** | **Threats** |
|  |  |

##### ***COMPETITORS***

|  |  |  |
| --- | --- | --- |
| **Name** | **Notable attributes** | **How did we find them** |
| **Competitor 1** |  |  |

***Absolute differenciator***

Explain here what differentiates your Company….

Strategy

***Goals & Milestones***

Grow the company client’s base and grow revenue in New territory.

Explain the Company overall objectives Here …

|  |
| --- |
| **MILESTONE 1** |
| **DUE** | 31/03/2021 |
| **GOAL** | **GOAL [add title]** Add details here … - needs to be SMART Goals |
| **APPROACH** | Detail approach here … |
| **PERIODICAL CHECKS** | **Date 1 – detail the purpose of the check and results here…** |
| **SUCCESS?** | YES/NO |

|  |
| --- |
| **MILESTONE 2** |
| **DUE** | 31/03/2021 |
| **GOAL** | **GOAL 1 [add title]** Add details here … - needs to be SMART Goals |
| **APPROACH** | Detail approach here … |
| **PERIODICAL CHECKS** | **Date 1 – detail the purpose of the check and results here…** |
| **SUCCESS?** | YES/NO |

|  |
| --- |
| **MILESTONE 3** |
| **DUE** | 31/03/2021 |
| **GOAL** | **GOAL 1 [add title]** Add details here … - needs to be SMART Goals |
| **APPROACH** | Detail approach here … |
| **PERIODICAL CHECKS** | **Date 1 – detail the purpose of the check and results here…** |
| **SUCCESS?** | YES/NO |

***Target companies***

|  |  |  |
| --- | --- | --- |
| Single gear outline | **Industry** |  |
| Marker outline | **Geography** |  |
| Store outline | **Size** |  |
| Clipboard Checked outline | **Notable Attribute** |  |
| Clipboard All Crosses outline | **Notable Disqualifiers** |  |

***Target individuals***

|  |  |  |
| --- | --- | --- |
| Management outline | **Responsibilities** |  |
| Briefcase outline | **Job Titles** |  |
| Clipboard Checked outline | **Notable Attribute** |  |
| Clipboard All Crosses outline | **Notable Disqualifiers** |  |

***Messaging***

detail initial messaging here ….

###### What terms seem to make targets click?

Add notes here as you learn about the territory ….

Lessons Learnt

|  |  |  |
| --- | --- | --- |
| 1 | **Lesson learnt 1…** | Explanation… |

Reviews and adjustments

***Change history***

|  |  |
| --- | --- |
| **Date** | **Change & Reason** |
| **01/02/2021** | #Initial release… |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |