

Sales Territory Planning Workbook

Segment accounts by region and vertical, allocate quota by rep, analyze whitespace, and build a territory plan your team can execute.

The Territory Planning Process

Good territory design is the foundation of a fair, predictable sales org. Territories planned by data — not seniority or habit — produce 20–30% higher quota attainment. Work through these six sections in order each planning cycle.

Section 1

Market Segmentation

Define regions, verticals, and company tiers

Section 2

Account Segmentation

Score and tier every account in your TAM

Section 3

Rep Capacity Planning

Accounts per rep, ramp time, headcount

Section 4

Quota Allocation

Assign quotas by territory and rep

Section 5

Whitespace Analysis

Identify untapped accounts and expansion

Section 6

Territory Summary

Final assignments and sign-off

SECTION 1

Market Segmentation

[illegible]

SECTION 2

Account Segmentation & Scoring

Score accounts 1–10 on fit and intent. Tier 1 = top priority; Tier 3 = long-term nurture.

[illegible]

SECTION 3

Rep Capacity Planning

Rep Name	Territory	Segment (SMB/MM/ENT)	Ramp Status	Max Accounts	Current Accounts	Capacity %	Availability for New Accounts
			☐ Ramping ☐ Full			%	
			☐ Ramping ☐ Full			%	
			☐ Ramping ☐ Full			%	
			☐ Ramping ☐ Full			%	
			☐ Ramping ☐ Full			%	
			☐ Ramping ☐ Full			%	

SECTION 4

Quota Allocation

Total rep quotas should sum to 110–120% of team target to buffer for attrition and ramp.

Rep Name	Territory	Q1 Quota	Q2 Quota	Q3 Quota	Q4 Quota	Annual Quota	% of Team Target
		\$	\$	\$	\$	\$	%
		\$	\$	\$	\$	\$	%
		\$	\$	\$	\$	\$	%
		\$	\$	\$	\$	\$	%
		\$	\$	\$	\$	\$	%
TEAM TOTAL		\$	\$	\$	\$	\$	%

SECTION 5

Whitespace Analysis

Whitespace = accounts that match your ICP but are not yet customers. Prioritize by score.

Account	Territory	Vertical	Revenue Potential (\$)	Products Not Yet Sold	Barrier to Entry	Assigned Rep	Target Close Quarter
			\$				
			\$				
			\$				
			\$				
			\$				
			\$				

SECTION 6

Territory Summary & Sign-Off

Territory	AE Assigned	Annual Quota	Tier 1 Accounts	Total Accounts	Manager Sign-Off	Date
		\$				
		\$				
		\$				
		\$				
TOTAL		\$				

VP Sales Final Approval

Signature

Name

Date



Territory built. Revenue planned.

Pair with the Opsply Sales Forecasting Model and QBR Deck Template to complete your RevOps planning stack.

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