
Territory Design, Coverage Models and Quota Alignment: Executive Training Course for Sales Directors

28 June – 9 July 2027
Cape town





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Programme Summary

Territory design, coverage models and quota alignment are the subject of this two-week training course for sales directors, regional sales managers and commercial planning heads, ending in a territory and coverage plan for one live region. Many organisations draw territories from history and set quotas from last year's totals, so effort and potential drift apart. The programme moves from territory principles, through diagnosis of coverage and workload, to design of boundaries, roles, quotas and reviews, and then to application. Mars Training Centre UK delivers this territory design programme for sales leaders from mixed organisations.

The Business Case

A territory decides which customers a seller meets, how often and with what chance of winning. When boundaries, account lists and targets are inherited rather than designed, strong sellers hold territories that are too rich, weaker ones hold territories that are too thin, and promising accounts go uncalled. A reasoned design and a fixed review rhythm give leaders one evidence base for assigning accounts, setting targets and explaining changes to teams.

- Revenue Coverage: Improves as high-potential accounts receive planned, owned attention.
- Quota Fairness: Strengthens as targets follow market potential and capacity rather than history alone.
- Seller Retention: Rises as territories are balanced and changes are explained with evidence.

Principles and Evidence Base

- Territory alignment as a design discipline: It frames how boundaries and account lists are drawn in Sessions 1 and 5.
- Account segmentation by potential and fit: It structures the account tiers built in Sessions 2 and 6.
- Workload and potential balancing: It underpins the capacity analysis in Session 4 and the quota logic in Session 7.
- Pipeline coverage as a planning ratio: It guides the health checks in Session 4 and the reviews in Session 8.

Intended Participants

- Sales directors who decide how markets and accounts are divided among teams.
- Regional sales managers who inherit territories and must rebalance them.
- Commercial planning heads who set coverage models and quotas.
- Sales operations leads who maintain account data and assignment rules.
- Key account and channel leaders who coordinate coverage across selling roles.



Typical functions include sales, commercial planning, sales operations and channel management in manufacturing, technology, financial and distribution sectors.

Learning Outcomes

1. Participants will be able to evaluate the fit between market potential and current sales coverage.
2. Participants will be able to diagnose imbalance in seller workload, pipeline health and territory results.
3. Participants will be able to construct territory boundaries and account assignments that follow stated design rules.
4. Participants will be able to design a coverage model that matches account tiers to selling roles.
5. Participants will be able to prioritise quota and target adjustments using potential and capacity evidence.
6. Participants will be able to justify a territory and coverage plan, and its change approach, to executives and sales teams.

Programme Structure

Day 1: Territory Design Principles and the Revenue System

What decisions does a territory plan settle for a sales organisation?

- Territory Decision Rights Map
- Revenue System Flow Diagram
- Territory Alignment Principles Sheet
- Design Objectives and Trade-Off Grid
- Territory Planning Calendar

Day 2: Market Potential and Account Segmentation

How is potential measured so that accounts can be tiered consistently?

- Market Potential Sizing Method
- Account Fit and Value Scoring Model
- Segment Tiering Matrix
- White Space Mapping Sheet
- Data Quality Gap Checklist

Day 3: Diagnosing Current Coverage and Territory Results

Where does current coverage leave potential unserved?



- Coverage Versus Potential Heat Map
- Territory Performance Dispersion Chart
- Account Call Frequency Audit
- Concentration and Dependency Review
- Territory Complaint and Conflict Log

Day 4: Diagnosing Workload, Capacity and Pipeline Health

Which sellers and territories carry more or less than their share?

- Seller Workload Estimation Model
- Capacity and Travel Time Analysis
- Pipeline Coverage Ratio Check
- Stage Conversion Review
- Imbalance Signal Scorecard

Day 5: Designing Territory Boundaries and Account Assignment

How are boundaries and named accounts assigned by rule rather than habit?

- Boundary Building Block Options
- Named Account Assignment Rules
- Geographic and Industry Split Comparison
- Overlap and Conflict Resolution Rules
- Territory Design Brief Template

Day 6: Designing Coverage Models and Selling Roles

Which selling roles and channels should serve each account tier?

- Coverage Model Options Table
- Role-to-Tier Allocation Grid
- Inside and Field Selling Split
- Channel Partner Handover Rules
- Coverage Cost-to-Serve Estimate

Day 7: Setting Quotas and Aligning Targets

How do targets follow potential and capacity rather than last year's total?

- Top-Down and Bottom-Up Target Bridge
- Potential-Weighted Quota Allocation
- Capacity-Adjusted Target Model
- Quota Attainment Distribution Test
- Target Communication Brief



Day 8: Territory Reviews, Rebalancing and Governance

When and how should territories be reviewed and changed?

- Review Trigger and Cadence Schedule
- Rebalancing Decision Criteria
- Account Transition Protocol
- Territory Governance Charter
- Territory Health Dashboard Layout

Day 9: Planning Implementation and Change with Sales Teams

How is a new territory plan introduced without losing customers or sellers?

- Stakeholder Impact Map
- Seller Conversation Guide
- Customer Handover Plan
- Compensation Interface Check
- Implementation Risk Register

Day 10: Applying Territory Design to One Live Region

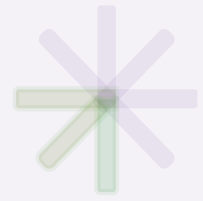
Is the territory and coverage plan ready to be put to executives and teams?

- Applying the Session 2 Tiering Matrix to the Region
- Testing the Session 4 Imbalance Scorecard on Seller Data
- Checking the Session 5 and 6 Assignments Against Capacity
- Rehearsing the Session 9 Seller Conversation
- Completing the Territory and Coverage Plan

Methodology

The programme uses a structured data exercise method built on anonymised account lists, pipeline extracts and short case notes from manufacturing, technology and distribution sales organisations. Participants work in small groups on a chosen region, record their reasoning on common templates, defend design choices in peer review and receive facilitator feedback before each work product enters the territory and coverage plan.

- Suggested activity: Re-tiering a sample account list and comparing the new tiers with current call frequency.
- Suggested activity: Redrawing two neighbouring territories by rule and testing the effect on seller workload.
- Suggested activity: Allocating a regional target across territories and defending the split to a sceptical seller.



Capstone Output

Each participant completes a territory and coverage plan for one live region. It holds an account tiering, a coverage and workload diagnosis, territory boundaries with assignment rules, a coverage model, a quota allocation, a review schedule and a change plan. The plan is used at work to brief executives, brief sellers and guide the next planning cycle.

Frequently Asked Questions

Is territory design suitable for sales leaders who have not redrawn territories before?

Yes. Territory design is taught from first principles and assumes responsibility for coverage, targets or planning, not prior experience of redrawing territories.

Which concepts does territory design rest on in this programme?

Territory design here rests on territory alignment, account segmentation by potential and fit, workload and potential balancing, and pipeline coverage as a planning ratio.

How is the territory and coverage plan from territory design used at work?

You use the plan to brief executives and sellers on boundaries, roles and quotas, and to schedule reviews and rebalancing in the next planning cycle.

How does territory design differ from a programme on sales team leadership?

Territory design centres on how markets, accounts and targets are divided, while sales team leadership centres on coaching, motivation and day-to-day performance management.