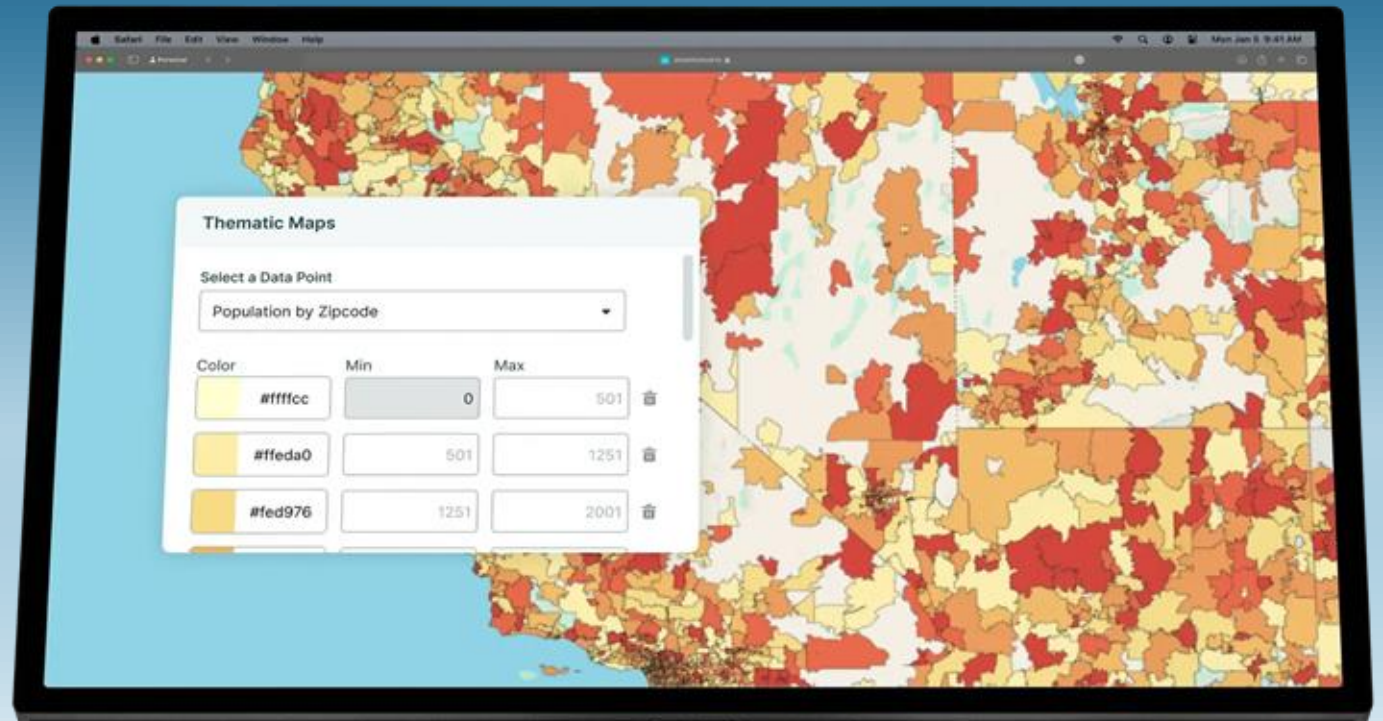


Annual Territory Planning is Broken

The shift from static planning to always-on territory design

[Learn More](#)



Annual planning doesn't match how sales actually works



Sales doesn't operate on an annual cycle anymore.

Markets shift quarterly, sometimes monthly. Reps change. Roles evolve. Priorities move.

But territories?

They stay frozen.

Most organizations lock their territories at the start of the year and operate as if nothing will change. In reality, everything changes.

By the end of Q1, most teams are already operating on outdated assumptions.

¹ Salesforce State of Sales Report

² SMA Research

³ RepVue Cloud Sales Index

83%



of organizations still use spreadsheets for territory planning¹

66%



of rep time is spent on non-selling activities²

47%



Of reps actually hit quota³

How territory planning traditionally works

For most organizations, territory planning follows a familiar pattern:

- 1 A once-a-year planning cycle
 - 2 Spreadsheet-based modeling
 - 3 Static assignments pushed into CRM
- Then the plan is set and execution begins.**
The assumption is simple: If the plan is good enough, it will hold.

But sales environments are not static.
And static plans don't survive dynamic markets.



The cracks show up almost immediately

As soon as execution begins, the gaps start to emerge:

- Territories drift out of balance
- Coverage gaps appear across key accounts
- High-value opportunities go untouched
- Managers step in to manually adjust

What started as a well-intentioned plan quickly becomes a patchwork of fixes.

Instead of executing with confidence, teams are constantly reacting.



This isn't just a planning problem. It's a revenue problem.

When territory planning breaks down, the impact extends far beyond operations.

01.

Revenue Loss

Missed opportunities. Incomplete coverage. High-value accounts slipping through the cracks.

02.

Productivity Loss

Reps spending time in the wrong places. Inefficient routing. Poor prioritization.

03.

People Impact

Burnout from uneven territories. Frustration from unclear expectations. Declining morale across teams.

The cost is not always visible at first. But it compounds quickly.

Planning, execution, and performance are disconnected

Territory planning doesn't fail because teams lack effort.
It fails because the system is broken.

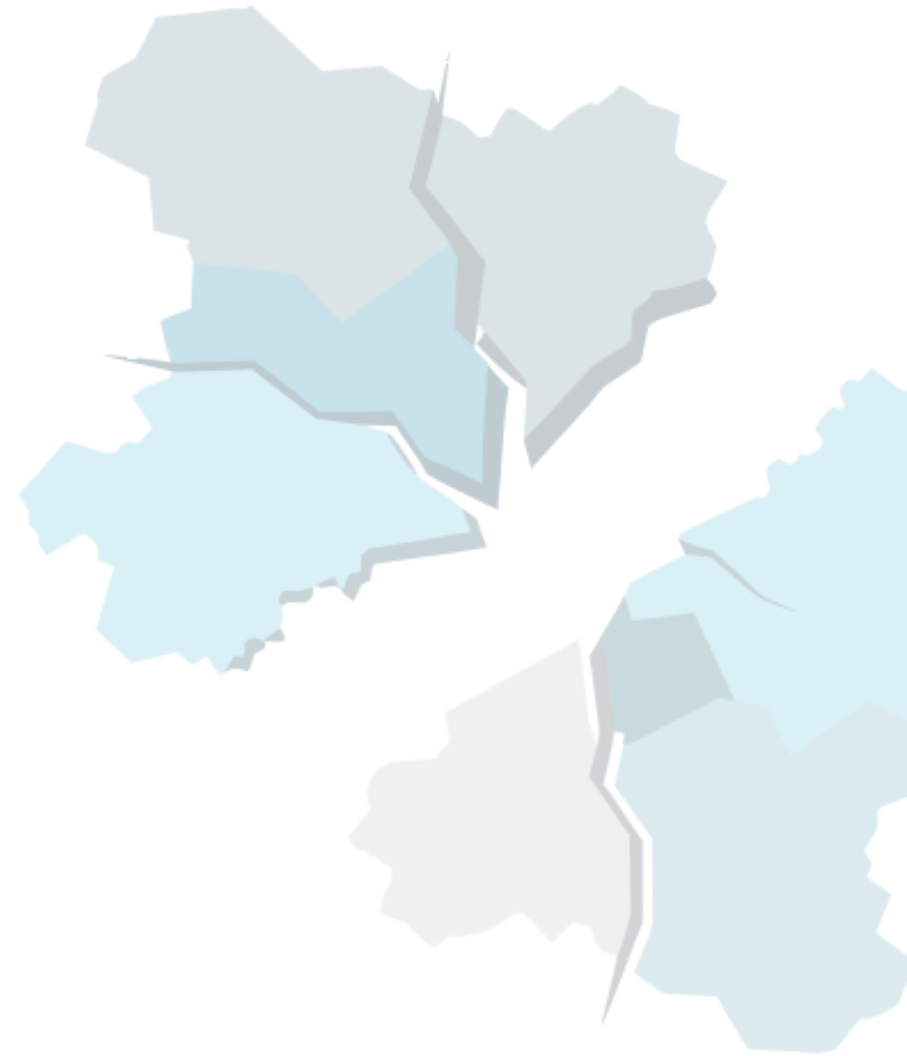


- Plans live in spreadsheets
- Execution happens in the field
- Performance is tracked somewhere else

These systems rarely connect.

By the time performance issues surface, the root cause is already buried in outdated territory decisions.

And by then, it's too late to fix without disruption.



World-class sales organizations treat territory planning as a continuous system



Leading organizations don't treat territory planning as a one-time event.



They treat it as an ongoing capability.



They've *shifted*

From:

To:

Annual Planning



Continuous Planning

Static Assignments



Scenario-based Modeling

Guesswork



Data-driven Decisions

Reactive Adjustments



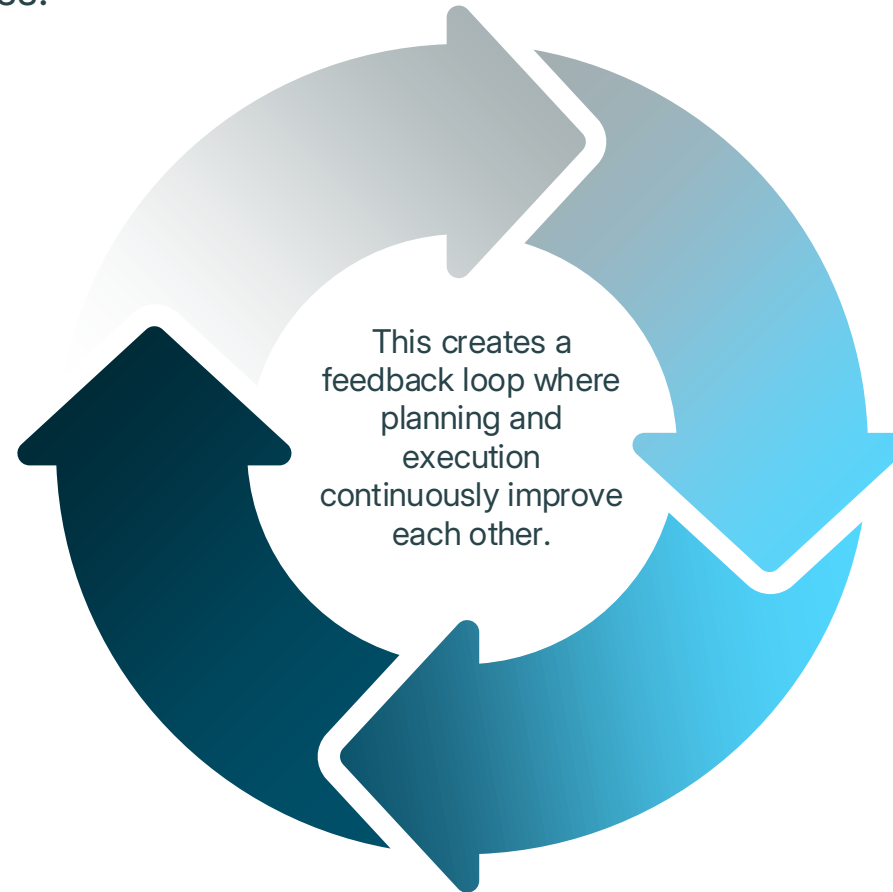
Proactive Optimization

Instead of locking territories, they evolve them.

A simple operating loop

Modern territory planning isn't a process.
It's a **system**.

- 1 Plan**
Model territories based on capacity, coverage, and opportunity.
- 4 Adapt**
Adjust territories and coverage in near real time.



- 2 Execute**
Drive activity in the field with clear priorities and direction.
- 3 Measure**
Track performance, identify gaps, and understand what's working.



What "Good" Looks Like

Characteristics of modern territory planning

Organizations that get this right share a few key traits:

- Territories are refreshed regularly, not just annually
- Scenario modeling happens before changes are deployed
- Leaders understand the downstream impact of decisions
- Coverage aligns with both opportunity and rep capacity

The result is not just better planning. It is better execution.



Find out how 3M improved territory coverage and resource deployment

[Read Now](#)

What teams unlock when they get this right

When territory planning becomes continuous, the impact is immediate and measurable:



**More effective
resource
deployment**



**Faster, more
confident
decision-making**



**Improved territory
balance and
fairness**



**Higher rep
productivity and
focus**

You don't need to rebuild everything

Modernizing territory planning doesn't require a complete overhaul.

Start with three steps:

01. Assess your current territories

Where are you over-covered?
Under-covered? Missing opportunity?



03. Create a feedback loop

Connect territory design to actual activity and performance.



02. Introduce scenario modeling

Test changes before deploying them.
Understand the tradeoffs.



Why this is hard to do manually

Spreadsheets were never designed for dynamic planning.

They break down when:

01.

**Conditions
change
frequently.**

02.

**Teams need
real-time
visibility.**

03.

**Decisions require
modeling
tradeoffs.**

Manual processes slow teams down and limit their ability to adapt.
To operate continuously, teams need systems that can keep up.



Learn how Howard Capital Management improved territory planning and advisor coverage

[Read Now](#)



From planning to execution to performance, connected

Territory planning works best when it is not isolated.
It should connect directly to how teams execute and how performance is measured.

That is the foundation of the Ascent Cloud platform



Territory Planner

Helps teams design and model territories with confidence



Geopointe

Enables execution in the field with location intelligence



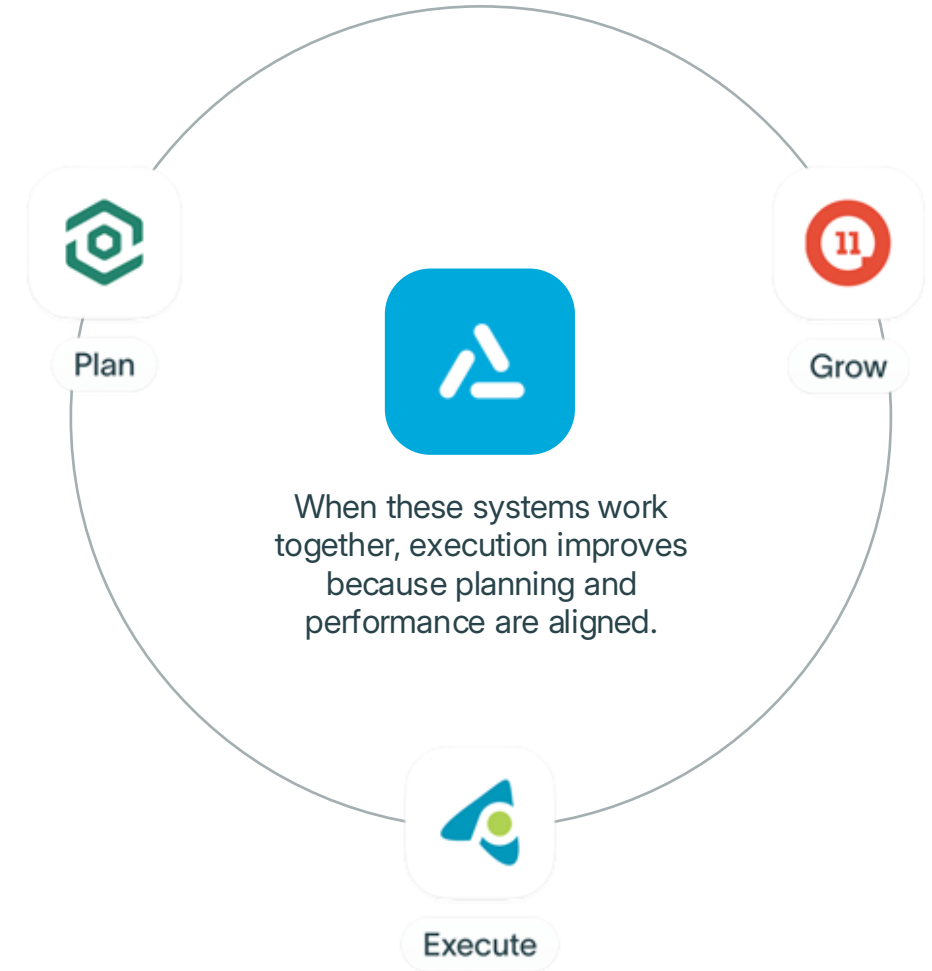
LevelEleven

Reinforces performance through coaching and visibility



Insights

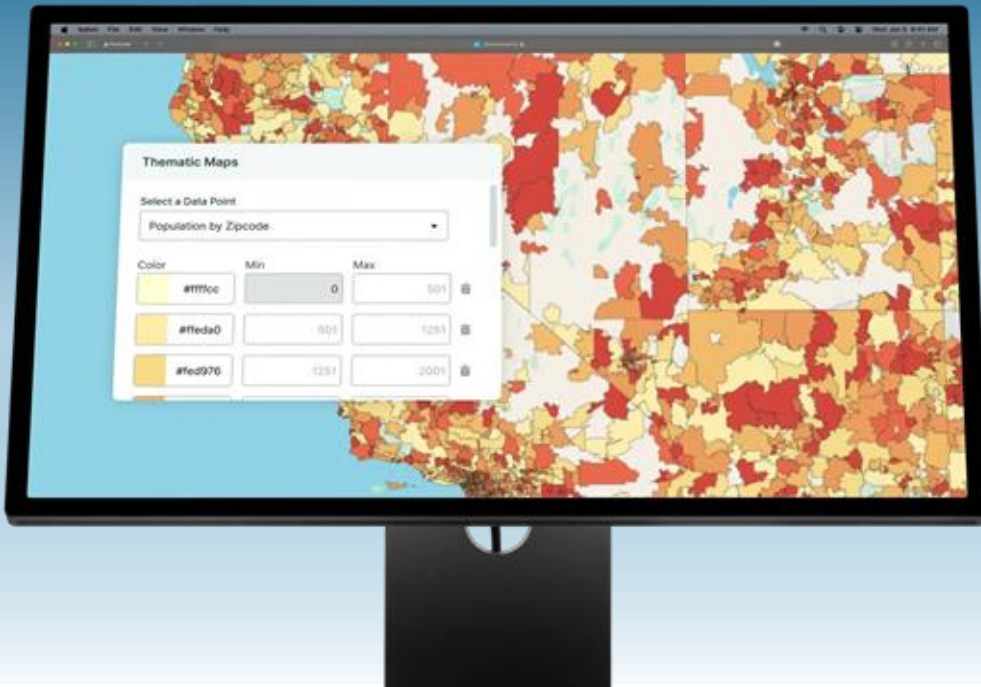
Surfaces trends, gaps, and opportunities across your revenue operation



See what continuous territory planning looks like in your business

If your territories are static, your results likely are too.

The opportunity is not just to improve planning. It is to build a system that drives better execution and performance over time.



Take the next step:

[Run a Territory Assessment](#)

Or start with a simple question:

Where are your territories already costing you revenue?