Territory planning checklist

An NIQ Company

PHASE 1: GOALSETTING

- ❑ Record the current situation
- ❑ Reason for area planning
- ❑ Define planning goals
- ❑ Document specifications/restrictions (locations, working hours,...)
- ❑ Explore the data situation (data sources)
- ❑ Involvement of stakeholders (works council, regional sales manager, ...)

PHASE 2: PREPARATION

- ❑ Internal data preparation (customer list, territory allocation, outside sales locations)
- ❑ External market data to assess potential
- ❑ Prepare key figures relevant to planning (e.g. workload, work capacity, sales, etc.)
- ❑ Update RegioGraph
- ❑ Refresh your RegioGraph knowledge
- ❑ Building data model
- ❑ Analysis of the current situation (strengths/weaknesses, achievability, potential analysis...)

PHASE 3: PLANNING

- ❑ Determine data-based territory optimum (greenfield proposal)
- ❑ Balancing conflicting goals between workload and capacity planning
- ❑ Create scenarios (rough planning)
- ❑ Scenario evaluation & choice of favorites
- ❑ Detailed planning taking qualitative criteria into account
- ❑ Benchmark scenario vs. initial situation

PHASE 4: COMMUNICATION & IMPLEMENTATION

- ❑ Documentation from OLD to NEW (key figure based)
- ❑ Table exports (customers, zip codes, areas) with all data (characteristics, assignments)
- ❑ Obtain commitment from stakeholders as well as from outside sales team and the works council
- ❑ Implementation of reassignments into systems