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**Overview**

This standard covers the design of sales territories or portfolios and the planning of the work of the sales team. It includes analysing the market, appraising options for the definition of territories or portfolios in order to establish the most appropriate plan to optimise the sales effort. It also includes planning and resourcing the work of the sales team in territories or portfolios. This standard is for senior sales professionals who manage sales territories or portfolios.

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**Performance  
criteria**

- You must be able to:
- P1 identify the key drivers for selecting or retaining a territory or portfolio management approach for structuring sales team activities
  - P2 define suitable territories or portfolios through investigation of the financial, economic and external marketing environments
  - P3 carry out a market assessment on a territory or portfolio based on the organisation's own criteria, including external market information and sales forecasts
  - P4 assess the resources needed to cover a territory or portfolio and meet targets
  - P5 evaluate the risks and benefits of defining new sales territories or portfolios
  - P6 plan sales resource requirements based on information about number, size and location of customers
  - P7 set financial and sales activity targets for the sales team
  - P8 determine boundaries for each sales territory or portfolio
  - P9 assign territories or portfolios to sales team members, matching knowledge, abilities and skills
  - P10 recruit or re-locate sales team members to service the new sales territories or portfolios
  - P11 monitor and control sales territory or portfolio performance
  - P12 take corrective action if sales performance does not meet targets

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**Knowledge and understanding****You need to know and understand:**

- K1 legal and regulatory aspects of territory or portfolio management
- K2 competitor activities relating to territory or portfolio structures
- K3 industry structure and geographic coverage
- K4 the geographical spread of the organisation's potential and existing customers
- K5 the organisation's sales strategies and plans
- K6 the reasons why the organisation is establishing or changing sales territories or portfolios
- K7 the organisation's market and customer segmentation strategies
- K8 how to undertake an investigation and evaluation of sales territories or portfolios
- K9 how sales territories or portfolios are established taking into account the size of the territory or portfolio, how to define territories or portfolios and economic support systems that may influence choice of boundaries
- K10 how to evaluate the potential turnover, profit and growth potential of a territory or portfolio
- K11 how to assess resource requirements for a territory or portfolio in terms of sales activities
- K12 how to design sales territories or portfolios in terms of size, location, number of customers, prospective accounts, product range, and number of contacts
- K13 how to monitor, evaluate and measure territory or portfolio and individual sales performance
- K14 how to undertake comparative studies and measures of territories or portfolios to establish benchmarks for performance
- K15 how to get the best response from a sales team
- K16 the organisation's sales activity plans

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<b>Suite</b>	Sales (2013)
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