

SALES REP ACCELERATOR

Sales Rep Territory Plan Template

[ACCOUNT PLAN AI PROMPT](#)
[TERRITORY/QBR DECK TEMPLATE](#)

How We Win This Year

Plan Contents

- **Past Learnings & Future Strategies** - How have I grown?
 - **Quota / Target** - What's my path to blow out quota?
 - **Tier 1/Big Bet Accounts** - My must win account strategies
 - **Tier 2/Tier 3 Accounts** - Strategy to find quick wins
 - **Stakeholder Map** - How are we aligning to key stakeholders
 - **Existing Customer Base Strategy** - How are we expanding relationships
 - **Help Needed** - from Leadership, Product, Marketing, etc
 - **Appendix** - helpful links to other docs/reports
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Past Learnings & Future Strategies

- **What Went Well (examples):**
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 - **What Didn't Go Well (examples):**
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 - **Strategies for this Year (examples):**
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Quota / Target

	# of Deals	Avg Deal Size	Amount	To Go
QUOTA			1,000,000	
Insert Product	10	75,000	750,000	250,000

Insert Product	2	25,000	50,000	200,000
Organic Upsell	10	10,000	100,000	100,000
Small Deals (seed)	5	5,000	25,000	75,000
Medium Deals (dept/division)			0	
Large Deal (large division/LOB)			0	
Whale (wall to wall, large dept)			0	
Attainment				x%

Tier 1 / Big Bets

Where I've been spending my time

Date	Subject	Contact	Account Plan	Activity Type
11/5	Meeting with Champion of Chase Bank	Mike Jones - VP of Innovation	LINK TO ACCOUNT PLAN	Champion Building

Upcoming Strategic Meetings

Meeting Name	Date	Goal	Briefing Document
Executive Project Review w ADP	12/15	Signoff from CEO to move forward with pilot	LINK TO DOCUMENT

Stakeholder Map

- Deal: (Insert Deal Name)
 - Stakeholder - Level of Influence - Skeptic/Neutral/Fan - Alignment
 - Stakeholder - Level of Influence - Skeptic/Neutral/Fan - Alignment
 - Stakeholder - Level of Influence - Skeptic/Neutral/Fan - Alignment
 - Deal: (Insert Deal Name)
 - Stakeholder - Level of Influence - Skeptic/Neutral/Fan - Alignment
 - Stakeholder - Level of Influence - Skeptic/Neutral/Fan - Alignment
 - Stakeholder - Level of Influence - Skeptic/Neutral/Fan - Alignment
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Existing Customer Base Strategy

Seed & Grow? Trusted Advisor? Describe your strategy with current customers

Customer	Current Investment	Target Investment	Target Delta	Strategy	Help Wanted
Fidelity	\$750,000	2.5M	1.75M	Position digital transformation for AI initiative	Executive relationship building

Tier 2 Top 10

Semi strategic accounts for the year

Account Name	Target Revenue This Year	Main Contact	Attack Plan Next Step	Help Needed
Dell	\$50,000	Director IT	Invite to IT dinner	Mgr to help get to VP

Tier 3 Strategy

How you'll not let your Tier 3 accounts slip through the crack while not letting them distract you from Tier 1/2s:

- Plan part 1
- Plan part 2
- Plan part 3

Help Wanted

What do you need from others to be successful?

Leadership:

- Steve Smith - SVP - Has a connection with CFO of X deal from past company. Need him to reach out to set a meeting to see if this is a priority

Product:

- Have clarity on the roadmap specifically to address concern from ADP on X feature

Marketing:

- Support to get custom branded apparel/swag for upcoming event on 12/18

Customer Success & Support:

- Escalate case #123123 related to ADP. Need that resolved ASAP for my champion.
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Appendix

INSERT RELEVANT LINKS TO HELP YOU DEFEND AND EXPLAIN THE PLAN