

Sales Territory Plan

[Your name]

[Name of your territory e.g. Western US enterprise]

[Period e.g. Q1 2025]

1. Territory Overview

- **Territory Description:** [Briefly describe the geo, industry or segment you're covering]
 - **Market Trends:** [List the key trends, challenges and opportunities in the market]
 - **Key Competitors:** [Identify the main competitors and their positioning in the territory]
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2. Ideal Customer Profile (ICP)

- **Firmographics:** [Company size, industries and key attributes that align with your solution]
 - **Technographics:** [Tools and tech that your solution either replaces or improves]
 - **Job Titles:** [Job titles of your champions, executive sponsors and influencers]
 - **Pain Points:** [Pain points that your solution addresses]
 - **Critical Events:** [Types of initiatives that your buyers have which your solution accelerates]
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3. Sales Goals

Revenue Target	[\$_____]
Open Opportunities	[\$_____] [XX opportunities closed]
New Opportunities	[\$_____] [XX opportunities generated and closed]
Pipeline Coverage	[Active Opps + New Opps] / [Revenue Target]

4. Open Opportunities Plan

Active New Logo Opportunities				
Account	Amount	Stage	Stakeholders	Next Meeting
[Account name]	[\$__]	Proposal ▾	[Name, job title] [Name, job title]	[date] [objective]
[Account name]	[\$__]	Proof of Value ▾	[Name, job title] [Name, job title]	[date] [objective]
[Account name]	[\$__]	Discovery ▾	[Name, job title] [Name, job title]	[date] [objective]
Total New Logo	[\$__]			

Active Upsell Opportunities				
Account	Amount	Stage	Stakeholders	Next Meeting
[Account name]	[\$__]	Proposal ▾	[Name, job title] [Name, job title]	[date] [objective]
[Account name]	[\$__]	Proof of Value ▾	[Name, job title] [Name, job title]	[date] [objective]
[Account name]	[\$__]	Discovery ▾	[Name, job title] [Name, job title]	[date] [objective]
Total Upsells	[\$__]			

5. Opportunity Generation Plan

New Logo Prospects			
Account	Amount	Stakeholders	Strategy & Next Step
[Account name]	[\$__]	[Name, job title] [Name, job title]	[strategy] [next step] [due date]
[Account name]	[\$__]	[Name, job title] [Name, job title]	[strategy] [next step] [due date]
[Account name]	[\$__]	[Name, job title] [Name, job title]	[strategy] [next step] [due date]
Total New Logo	[\$__]		

Upsell Prospects			
Account	Amount	Stakeholders	Strategy & Next Step
[Account name]	[\$___]	[Name, job title] [Name, job title]	[strategy] [next step] [due date]
[Account name]	[\$___]	[Name, job title] [Name, job title]	[strategy] [next step] [due date]
[Account name]	[\$___]	[Name, job title] [Name, job title]	[strategy] [next step] [due date]
Total Upsells	[\$___]		

6. Asks for Help

- **Executive nudges for active opps** [Accounts, stakeholders and exec who knows them]
- **Executive intros to prospects** [Accounts, stakeholders and exec who knows them]
- **Training & materials** [e.g. coaching, industry-specific slides, battle cards]