

OUTSELL PLAYBOOK

OUTSELL JOURNAL — DECISION WORKSHEET

Using account intelligence to test a territory plan

QUESTION

Does the territory design create workable ownership and balanced opportunity?

GUIDE TAKEAWAY

Equal account counts do not create comparable territories. Accounts differ in fit, purchasing structure, research needs, renewal obligations, and relationship complexity.

START HERE

Clean account hierarchy.

YOUR SITUATION

Account or cohort

Decision to make

Starting state and exclusions

Evidence sources, dates, and limitations

Unknowns to validate

WORK THROUGH THE GUIDE

1. Clean account hierarchy

Evidence or input

Output or decision

Owner and review point

2. Estimate effort and potential

Evidence or input

Output or decision

Owner and review point

3. Model assignments

Evidence or input**Output or decision****Owner and review point**

4. Review ownership exceptions

Evidence or input**Output or decision****Owner and review point**

5. Activate and assess

Evidence or input**Output or decision****Owner and review point****COMPARE THE OPTIONS**

Geographic assignment

Useful when: Local coverage or travel matters

Limitation: Headquarters may not own buying

Suggested action: Check regional entity rules

Why this fits our situation**Evidence needed before acting**

Named-account ownership

Useful when: Complex strategic relationships

Limitation: Workload can concentrate

Suggested action: Plan support and capacity

Why this fits our situation**Evidence needed before acting**

Segment specialization

Useful when: Different expertise is required

Limitation: Cross-segment groups create overlap

Suggested action: Define coordination owner

Why this fits our situation

Evidence needed before acting

Scenario planning

Useful when: Testing a proposed reassignment

Limitation: Input assumptions shape apparent balance

Suggested action: Review workload and exceptions

Why this fits our situation

Evidence needed before acting

COMMIT TO A BOUNDED NEXT STEP

Chosen action

Responsible owner

Required approval

Success measure and definition

Review date

Continue, revise, or stop criteria

Guide: <https://outselll.com/blogs/territory-planning-account-intelligence/>

Publisher and evidence policy: <https://outselll.com/editorial-policy/>