

Territory Coverage - Zone Development

Territory Coverage, determining the area where you are going to proactively spend time each day, is one of the most persistent challenges for field sales professionals throughout their career. When done well, it addresses the challenge of speaking with the greatest number of the “right” producers and prospects in the most time efficient manner. Effective zone development considers both the size of the zone (travel time) and the density of the opportunity within the zone (having a productive day, every day). The greater challenge is in staying on course, overcoming the inevitable distractions and disruptions in covering any territory.

A few guidelines to consider:

- The goal is to work proactively in a single zone each day. There must be a sufficient number of the “right” opportunities in each zone to stay the course.
- Start by determining the number of meetings or scheduled calls you wish to have every day. Then consider your scheduling “success rate”. How many advisors must you contact in order to meet your desired level of activity every day? For example, if your scheduling success rate is 20%, it will require 25 advisors in each zone to hold five meetings each day (25 advisors x 20% equal 5 meetings).
- Next determine how many advisors you wish to include in your scheduling pool. For instance, if you wish to proactively pursue 300 advisors then in a perfect world you would have 12 distinct zones (300 advisors divided by 25 per zone equal 12 zones)
- As a practical reality it will be almost impossible to have exactly the same number of advisors in every zone. Even 80% of your desired minimum is likely a worthy consideration for a zone. If the number of advisors is more than double your minimum required, divide the zone into two zones.
- Plot your producers and prospects using mapping software to help you visualize your zones. Ideally use different colors or shapes to identify different subsets of advisors (top producer, dabbler, prospect, etc.) Identify the “outliers” (those areas of your territory with an insufficient number of targeted producers to qualify as a “zone”).
- There is a 100% certainty that something will disrupt your rotation through the zones. Determine 2 or 3 zones within your territory you can “skip if needed” from time to time when life gets in the way and which zones within your territory you “must see” each time through your rotation.
- The secret to long-term success is to also identify a “zone free” day...a day without allocation to any zone in order to have a safety valve for scheduling conflicts with key advisors, or quickly meeting again with advisors who are moving forward and even to travel to those hard to reach “outlier” areas of a territory.
- Zone analysis tells you how effective your efforts have been within each zone. It allows you to know what percentage of your sales came from what percentage of your advisors using what percentage of your meetings.

Zone Development Worksheet

Based on the guidelines offered, use the table below to segment your territory into zones. It will require additional time and data to complete the entire analysis.

"Must See" Zones	Number of Advisors	% of Total Advisors	Zone Sales	% of Total Sales	Number of Meetings	% of Total Meetings
1.			\$			
2.			\$			
3.			\$			
4.			\$			
5.			\$			
6.			\$			
7.			\$			
8.			\$			
9.			\$			
10.			\$			

"Skip if Needed" Zones	Number of Advisors	% of Total Advisors	Zone Sales	% of Total Sales	Number of Meetings	% of Total Meetings
1.			\$			
2.			\$			
3.			\$			

Identify "Outliers"	Number of Advisors	% of Total Advisors	Zone Sales	% of Total Sales	Number of Meetings	% of Total Meetings
1.			\$			
2.			\$			
3.			\$			

For more tools and related articles, see www.northpointepartners.com