Category

Commercial Excellence

Territory Design & Sales Capacity Planning Playbook

A data-driven method for carving territories and sizing the sales team so quota is achievable, coverage is balanced, and headcount investment is defensible to Finance.

- Practitioner
- Advanced
- Template Included
- Workshop Ready

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- 8 minute(s)

Overview

A territory design and capacity planning playbook using whitespace scoring and a quota-to-capacity model to fix unbalanced patches, defend headcount asks, and stop reps quitting over unfair territories.

How often should territories be redrawn?

Annually is standard for most B2B motions; semi-annually only if your market or account base is unusually fast-moving. More frequent than that erodes rep trust and discourages long-cycle account investment, since reps start to doubt they'll still own the account by the time it closes.

What's a reasonable capacity ceiling for an enterprise rep versus a mid-market rep?

There's no universal number — it depends heavily on sales cycle length and deal complexity — but as a rule of thumb, enterprise reps with 6-12 month cycles typically carry a low double-digit number of core accounts, while transactional mid-market reps with shorter cycles can carry several times that. Derive your own ceiling from historical touch-frequency data rather than borrowing an industry rule of thumb wholesale.

How do we handle reps who lose their best accounts in a rebalance?

Grandfather any late-stage active pipeline (typically 90-180 days), and where possible phase the transition rather than an overnight cutover. Transparency about the whitespace math behind the decision also matters as much as the mechanics — reps who understand

why accept it more readily even when the outcome isn't in their favor.

Should quota be uniform across reps in the same role?

No — quota should scale with each territory's whitespace value and realistic capture rate. A uniform quota across territories with very different potential is what produces the wide attainment spread this playbook is designed to fix in the first place.

What data do we need if we don't have clean firmographic data on our accounts?

Start with what you have — even employee count and industry code from a CRM export is enough for a first-pass whitespace score — and treat data enrichment as a parallel workstream rather than a blocker. A rough whitespace score built on partial data still beats no scoring model at all.

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