SmartSuite

Business Operations › Sales Operations · Datasheet

Territory & Account Assignment

Define territories and assign accounts with automated routing and real-time visibility across sales teams.

Specification

SKU	BUS-SLS-TER
Solution area	Business Operations
Works with	Sales CRM, Sales Playbooks & Execution Management, Revenue Operations & Forecasting, Customer Lifecycle & Success Management
Updated	Sep 26, 2026
Datasheet	v1.0

What it is

Territory & Account Assignment is the process of defining sales territories and assigning leads, accounts, and opportunities to the appropriate sales representatives. It ensures that sales coverage is optimized and that opportunities are routed efficiently.

SmartSuite’s Territory & Account Assignment solution provides a structured, scalable system to define sales territories, assign accounts, and route leads and opportunities across teams. It replaces manual assignment, inconsistent ownership, and spreadsheet-based tracking with a centralized, rule-driven system.

With a centralized assignment system, sales and operations teams gain full visibility into who owns what, where, and why.

Core capabilities

Territory Definition & Management
Define territories based on geography, segment, product, or custom criteria.

Account Ownership Assignment
Assign accounts to specific sales representatives or teams.

Lead Routing & Distribution
Automatically route incoming leads based on predefined rules.

Opportunity Assignment & Reassignment
Ensure deals are owned and managed correctly.

Rule-Based Assignment Logic
Create flexible routing rules based on business needs.

Workload Balancing & Coverage Optimization
Distribute work evenly across teams.

Real-Time Ownership Visibility
Track who owns each account, lead, or opportunity.

Workflow Automation & Alerts
Trigger assignments and updates automatically.

Audit Trails & Governance
Maintain traceability for all assignment changes.

The Territory & Assignment Lifecycle

Step 1
Define Territories & Rules
Establish segmentation and assignment criteria.

Step 2
Assign Accounts & Ownership
Allocate accounts to sales teams.

Step 3
Route Leads & Opportunities
Distribute incoming work automatically.

Step 4
Monitor Coverage & Workload
Track performance and balance workloads.

Step 5
Optimize & Adjust Continuously
Refine territories and rules over time.

Who it is for

Sales Leaders (CRO, VP Sales)
Define territory strategy and coverage models.

Revenue Operations Teams
Manage assignment rules and optimize performance.

Sales Operations Teams
Ensure accurate routing and ownership.

Sales Representatives (AEs, SDRs)
Receive and manage assigned leads and accounts.

Customer Success Teams
Maintain continuity of ownership post-sale.

Executive Leadership
Monitor performance across territories.

Works with

Sales CRM
Provides leads, accounts, and opportunity data.

Sales Playbooks & Execution Management
Guides execution based on ownership.

Revenue Operations & Forecasting
Tracks performance by territory and owner.

Customer Lifecycle & Success Management
Maintains ownership through customer stages.

Built differently. Territory & Account Assignment runs on the same relational platform as every other SmartSuite product, so its records link to the risks, controls, issues and evidence they affect, and every report reflects the current state rather than a copy.

See it working with your data

Ask your SmartSuite account team for a demo of Territory & Account Assignment configured for your organization, or read the full product entry at smartsuite.com/products/territory-account-assignment.

Schedule a demo