people.ai

Shape the Future of Territory Design and Sales Planning with AI and a Data-Centric Approach

How many times have you run into this? After two quarters of record numbers, a top performing sales rep leaves your organization for a competitor. After an exhaustive (and exhausting) hiring process, you've replaced the rep with a new one whom you're confident can quickly meet quota. With the right effort and coaching, they might even be able to outshine the previous rep.

Then the calls start. The previous rep wasn't taking realistic notes, or any notes at all. Some of the "top accounts" moved headquarters to territories on the other side of the country during the last quarter. Other accounts went cold when the previous rep stopped calling on them and they've landed solidly in the hands of competitors. Your new rep is willing to work, but the health of the territory doesn't reflect what was described in the interview.

Your organization lost a top performer to a competitor. And now you're facing the loss of a new hire, or at the very least, broken trust. Not a good start.

How could this situation have been prevented? By using AI and account planning tools, natively built into your existing CRM.

There is an alternative scenario where your CRM would have notified your management team of the new address for any major accounts that had relocated, so you'd have known which territory they belonged to. You also could track existing accounts that were slipping – activity and engagement wise – in real time. Immediately after the sales rep resigned, your go-to-market team could have begun to reassess how to split up new territories and reassign key accounts.

Better yet? All of this can be done without any of your sales reps taking a single note, as the technology is built into your CRM and updated each time a rep communicates with the customer.

Exercise a data-driven approach to firm up your territory designs using this checklist:

☐ **Improved planning process:** Sales productivity metrics help sales leaders benchmark their teams. They can also use the data to identify challenged areas and initiate improvement mechanisms.

☐ **Improved resource allocation:** Productivity metrics empower GTM leaders to make educated decisions on when and where to allocate or reassign resources.

☐ **Increased pipeline:** Build and track pipeline more efficiently by focusing more on selling within the right accounts, and less time on administrative tasks.

☐ **Increased sales capacity:** Account assignments and territories are based on quantifiable metrics, resulting in optimized coverage and improved sales capacity.

☐ **Retain top reps and reduce churn:** Optimizing territory design and the allocation of key resources sets up your top performers for future success, improving retention rates and reducing costly churn.

Plan, measure, execute, and iterate with People.ai

People.ai provides an open and extensible data platform that allows you to "connect the dots" between data endpoints so you can plan, measure, execute, and iterate in enterprise fashion. Rep turnover, long onboarding cycles, and bad CRM data are stumbling blocks for every sales leadership and operations team. These obstacles also make it difficult to create or reassign territories to set up your top performers for sustained success, resulting in up to 30% lower sales performance compared to industry average.

That's why People.ai provides users with:

Automated Activity Capture in Your CRM

People.ai automatically captures rep activity and matches it to the right accounts, opportunities, and leads in your existing CRM. Being able to see every single historical activity – meetings, emails, calls, including with each account contact – makes it easier to rebalance sales territories. So in the earlier scenario, as your rep leaves the company, you'd have an intact audit trail of activity within their accounts, including those that have been underserved and may be at risk. Through the power of automation, reps can spend more time engaging accounts and generating revenue, and your management team no longer has to chase down reps for sales notes and account updates, giving them more time for planning and coaching.

Account Coverage Metrics

Gain up-to-date sales activity information that you and your GTM team can use to determine which accounts to assign (or reassign) to which territory. Justify account assignment based on account- and contact-level engagement scores and compare those activities against benchmarks of top performers to ensure priority accounts are receiving proper attention.

Sales Rep Capacity Metrics

Equipped with proper sales productivity metrics, sales leaders and frontline managers can make more informed decisions on how to rebalance accounts and optimize the use of their salesforce. With this information in hand, you can react to changes within territories and assign or reassign accounts to give all of your reps their best chance at exceeding revenue targets.

How video conference market leader Zoom used People.ai to increase rep productivity and their sales pipeline by 43%

"People.ai is one of the key tools for managers to keep their finger on the pulse of what's actually going on with their teams. Arming them with ready-made information so they can ask the best questions to get the best answers in their 1:1s—I think it levels up everyone's game. I think that's crucially important in sales."

Zoom Sales Enablement Analyst

zoom

Outcomes Included:

42% increase in rep bookings

37% increase in meetings per rep

43% increase in overall pipeline

Read the full case study

Get fit for the future with AI-powered sales planning

Learn how People.ai can spot you on the heavy lifting of territory design and other sales planning processes by downloading our workbook or requesting a demo.