

Territory management automation survival guide

Lead routing is just the tip of the iceberg

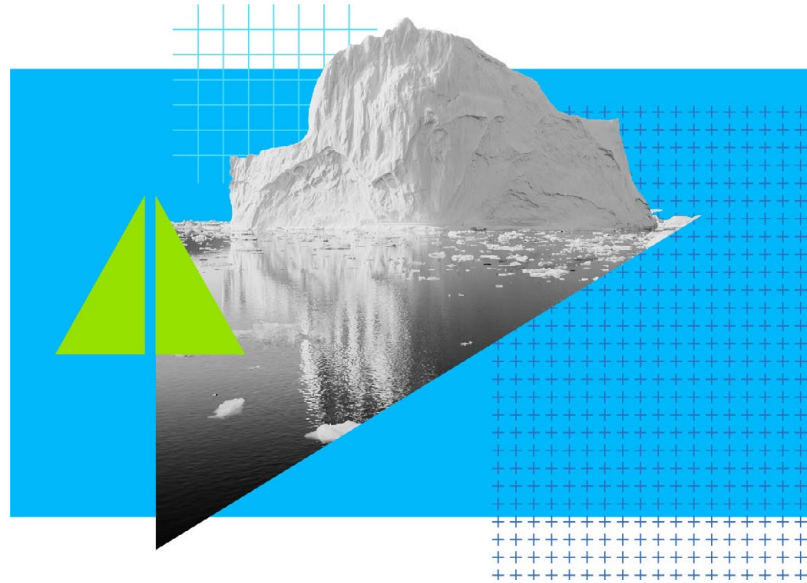




Table of contents

Introduction	3
Three hypothetical examples	3
What is territory management automation?	4
1 Foundational processes	5
Data quality	5
Data quality strategies and best practices	5
Keys to data quality success	6
Enrichment	7
Enrichment strategies and best practices	7
Keys to enrichment success	8
Segmentation	9
Segmentation strategies and best practices	9
Keys to segmentation success	11
Account hierarchy	12
Account hierarchy strategies and best practices	12
Keys to account hierarchy success	13
Territory planning	14
Territory planning strategies and best practices	14
Keys to territory planning success	14
2 Intermediary processes	15
Lead-to-account matching	15
Lead-to-account matching strategies and best practices ...	15
Keys to lead-to-account matching success	15
Partner deal registration	16
Partner deal registration strategies and best practices	16
Keys to partner deal registration success	16
Account carve and account assignment	17
Account carve strategies and best practices	18
Example #1: Company A	18
Example #2: Company B	18
Keys to account carve and account assignment success ...	20
3 High-level processes	21
Lead routing	21
Lead routing strategies and best practices	21
Keys to lead routing success	22
Scoring and grading	23
Scoring and grading strategies and best practices	23
Keys to scoring and grading success	24
What does it all mean?	25



Introduction

Lead routing is an essential part of just about every sales team. While native CRM features and well-established third-party solutions can automate this process, many companies are frustrated with how poorly this process works—and how time-consuming it is.

Three hypothetical examples:

- A large technology company routes leads to 600 sales reps using a prominent lead routing solution. But the routing accuracy is under 50%. Why? Poor data quality. The tool's configuration can't keep up with continual changes.
- A fast-growing SaaS company uses a top lead routing solution that depends on Marketo for data enrichment and normalization. Still, it's difficult to orchestrate the right timing and sequencing of automation between these two technologies, so leads get rerouted multiple times within an hour of creation.
- A rapidly-expanding SaaS company's global account management solution prioritizes account hierarchy to determine account and lead ownership. Its account hierarchy logic varies by region, using a different schema in North America, EMEA, and APAC. However, missing geographical data and the limitations of native CRM routing functionality limits them to the same hierarchy structures for every region.

What do all these companies have in common? They can all trace their struggle with lead routing automation to a lack of data quality, delegated administration, and account hierarchy controls. These struggles prove that lead routing is only the tip of the much bigger iceberg: **territory management automation**.

What is territory management automation?

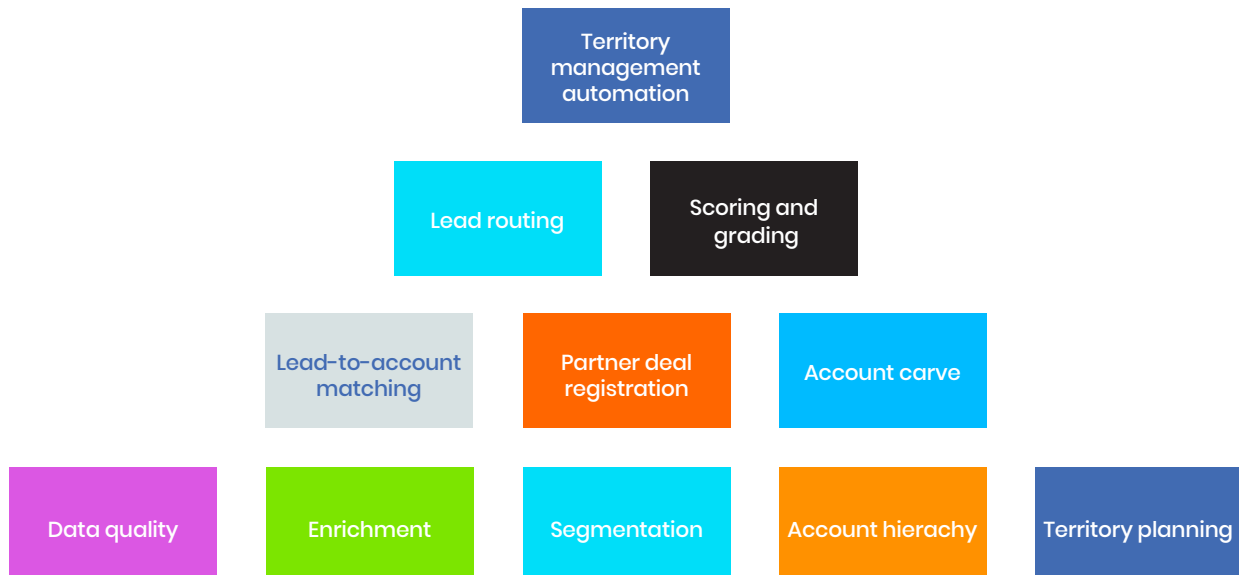
Simply put, territory management automation is the group of processes and technology required to accurately assign all revenue-related relationships, typically represented by data objects in the CRM, including assigning:

- Sales reps to territories.
- Accounts to sales reps and territories.
- Buying centers or demand units to sales reps.
- Leads and contacts to sales reps and buying centers.
- Opportunities, orders, and tasks to sales reps.

The process and business rules needed to properly assign and maintain these relationships grow exponentially in complexity as the sales organization grows. As a rule of thumb, once you have more than 50 sales reps, you'll need a comprehensive territory management automation platform, not just a simple lead routing tool.

Recently, a Sales Management Association survey of 100+ enterprise companies on territory design found that "companies using technology in territory design had 10% higher achievement of sales objectives than the average."

A comprehensive territory management automation solution requires a broad range of capabilities. We'll discuss each component and the role it plays in the overall solution architecture, starting from the bottom up.



Think of territory management automation and all of its sub-processes as a pyramid: it all starts with a solid foundation. Overlooked or poorly executed processes weaken the entire pyramid, risking inaccuracies, misalignments, overlapping ownership, and misrouted leads. A territory management automation platform can consolidate and streamline all of these processes.

1 Foundational processes

Foundational processes lay the framework for supporting higher-level processes. Without a solid foundation, these processes will perform less reliably, require more manual intervention, and it will become increasingly difficult to handle poor and missing process inputs.

Data quality

The proverbial “garbage-in-garbage-out” problem may be the single most important, yet most often ignored root cause of incorrectly routed leads and accounts assigned to the wrong territory. Let’s look at a few real-life examples:

- A cloud infrastructure company split its commercial accounts in California into NorCal and SoCal, and carved out the Pittsburgh metro area from Pennsylvania into another territory called Ohio Valley. The company defines these territories by ZIP codes. If a lead comes in with city, state, but no ZIP code, it goes to a queue for manual assignment, resulting in delays and a lower probability of connecting with the prospect.
- A Fortune 200 company implemented some forms without the proper country/state dependency, so it ended up with a lot of leads with “Alabama, Afghanistan” as the address. This auto-disqualified a lot of North American leads. As a result, those leads were never routed for follow-up.

When people ignore data quality, they often try to compensate by hard-coding logic into the lead routing rules to deal with bad data. The resulting automation becomes overly complex and difficult to maintain, causing many leads to route incorrectly.

Data quality strategies and best practices

When it comes to data quality, your territory management automation platform should be able to handle a few key operations, including:

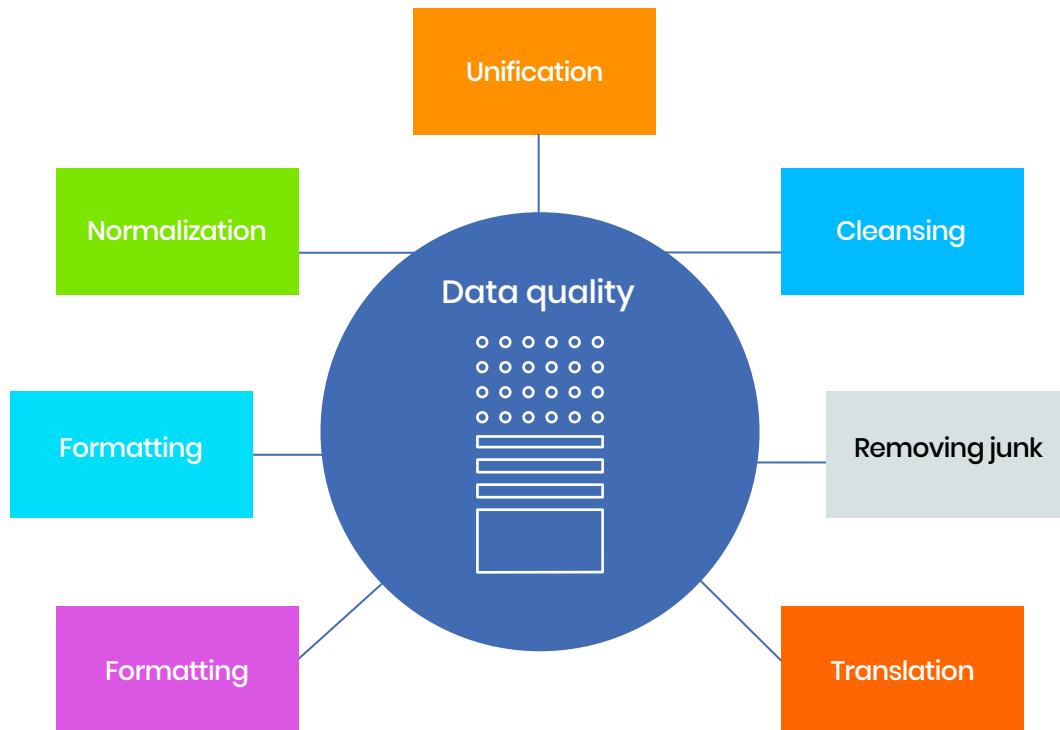
- **Continuously cleaning and blocking dirty data.** It’s not good enough to clean your source data yearly, biyearly, quarterly, or even monthly. You’ve got to clean your data continuously, within moments of every new record or variable entering your systems of record. This way your business processes always use fresh data.
- **Handling any data set or any system.** It’s not just leads, contacts and accounts, but also demo and free trial data, support data, HR and finance data—even third-party intent signal data. Applying data quality best practices across all of these systems and data objects supports a more holistic and representative dataset.
- **Performing all data quality operations under one roof.** When you manage multiple pieces of software, you introduce usability, interoperability, and efficiency issues. One platform means fewer data silos, less software to manage and pay for, and more time to focus on the activities that drive revenue.

1 Foundational processes

Keys to data quality success

Make sure you select a platform that can perform these functions, otherwise your data won't be as clean and actionable as it could be:

- **Normalization**—standardize field values to one common convention. For example, “CA,” “Calif.,” and “Ca” all normalize to “California.”
- **Dedupe**—merge duplicates records (leads, contacts, accounts or any custom object).
- **Unification**—connect and group data from disparate systems into one golden record, master dataset, and 360-degree view.
- **Removing junk**—purge bogus names, titles, companies, and the like.
- **Formatting**—use proper casing, correct typos (.con -> .com), and standardize phone numbers (408.555.7971 -> +1 (408) 555 7971), including country code for ease and accuracy.
- **Translate**—convert field values into the right language for your sales and marketing teams.



Data quality is about more than just cleansing. For data to be thoroughly clean, it must undergo each of these processes. For the best results, perform these operations continuously, not as batch processes once a quarter or half-year.



Enrichment

Automated assignment logic is data-driven. You need clean data to route properly. Depending on how the lead enters your CRM, you likely don't have all the necessary data to drive assignment rules, and this is where enrichment becomes a necessary part of the process. You need the raw data as the starting point—whether it's an address for geography-based rules, name and domain for named account rules, or industry and company size for segment rules. Using your existing lead enrichment services earlier in the lead flow and building multi-source enrichment capabilities like the Openprise Data Marketplace, into your territory management automation platform ensures your processes start with enough data to enable downstream initiatives.

Enrichment strategies and best practices

Be sure to follow these tips to structure a successful enrichment program:

Determine your enrichment goals:

- Identify new prospects
- Enrich existing prospect data
- Validating first and third-party data

Determine which processes the data will support:

- Sales prospecting efficiency
- Tactile campaigns
- Segmentation, scoring, and attribution
- List loading or list enhancement
- Form appendments
- Territory management automation

Identify your target market. You'll need to understand your company's ideal customer profile (ICP) to identify which enrichment providers to target. Consider these factors when determining your audience:

- Business or consumer
- Company size
- Industry
- Job function or department
- Job level or seniority
- Geography

Identify providers that carry the data you need.

Every provider specializes in a different area. Make sure you select vendors that deliver databases with good coverage for your customer profiles.

Select your data providers. Many factors influence how you buy and who you buy from:

- Single vendor or best-in-class
- Single source or multi-source
- Cost mode, whether that's credits, per record, pay request or API call, or unlimited data

Run a match test. Use a representative sample of your database—at least 10,000 records—to evaluate the vendor's enrichment performance.

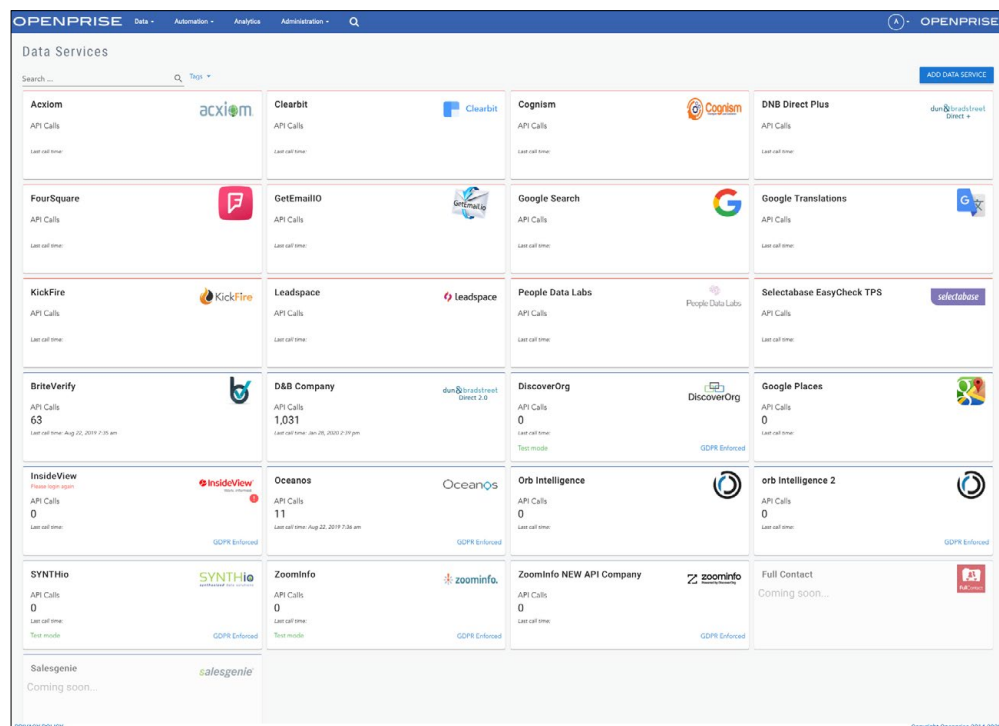
Validate results. Even if a data provider finds a match, it just means they have a record. It doesn't mean the record is any good. The only way to gauge a data provider's quality is to validate it yourself.

Enrichment

Keys to enrichment success

Be sure to follow these tips to structure a successful enrichment program:

- Consider a multi-source enrichment strategy. It's unlikely that one data provider can meet all your data needs.
- Be sure you understand your needs and requirements to ensure you select the right data providers.
- Think of enrichment as a continuous process, and ideally, one that's automated. The extra time and effort involved in automating the process will pay for itself quickly.
- Reconcile new data into your primary fields immediately. Don't use custom fields. Then, determine the appropriate logic about which data fields to keep, which to eliminate, and when to overwrite.
- Always ask providers which third-party data they've sourced. It's important to understand what the original data sources are so you don't pay for data more than once.



A RevOps data automation platform with an integrated data marketplace offers dozens of specialized enrichment providers, making it easy to integrate enrichment with the rest of your data processes.



Segmentation

Many assignment rules rely on numerical data or a picklist of values—whether that’s industry, number of employees, annual revenue, or assets under management. So you need to segment the data for assignment rules to work efficiently. For example, the raw data for annual revenue collected from different sources can show up in all these different formats:

- 25,000,000
- 25 million
- 10,000,000–
- 100,000,000
- 25 mil
- 25m
- 25mn
- 25mm
- 5m to 50m

Instead of forcing your routing rules to decipher and try to predict all the possibilities, the scalable and manageable approach is to segment your data into a list of defined ranges that fit your organization’s sales strategy.

Segmentation strategies and best practices

To successfully segment a database, start with the most popular and highest ROI segmentation dimensions. We recommend starting with these:

Job level, seniority, or role

What is it?

How senior is the lead within the organization? Are they C-level, executive, manager, or individual contributor?

Why is it important?

What role does this person play in the buying process? Are they a budget owner, a decision maker, or an influencer? Do they belong to a buying center within the organization? Knowing the answers to these questions enables more precise targeting.

Where does this data come from?

You can infer job level from job title. So you can segment most databases immediately without enriching or appending any new information to the existing records.

Job function

What is it?

Which job function or department does the lead or contact work in? For example, Finance, Marketing, or IT?

Why is it important?

People from different business functions within an organization likely use your product, so it’s important to know exactly what business function the lead is from. If the department making the purchase decision (like IT) isn’t the same as the department that will use the product (like Finance), then it’s important to identify the lead’s role in the buying process based on job function.

Where does this data come from?

You can infer job function from job title.



Segmentation

Company size

What is it?

How big or small is the company the lead works for?

How do we measure company size? You can determine company size using annual revenue or number of employees.

Why is it important?

Very few B2B vendors sell to companies of all sizes. Even if your company does, you'd target different product lines and sales teams to large enterprises vs. the small or medium businesses.

Where does this data come from?

You can acquire annual revenue and number of employee data from data services like ZoomInfo and Dun & Bradstreet.

Industry

What is it?

What industry, market, or vertical does the company operate in?

Why is it important?

Many B2B products are sold to specific industry verticals. Even for "horizontal" products that can be sold to companies across multiple industries, companies often target a small set of industries that deliver higher ROI than the rest. For example, some industries may be better targets because they buy more, pay more, buy faster, require less customization, or require less support. Marketing priority and strategy should always have an industry focus.

Where does this data come from?

You can readily obtain NAICS and SIC codes from a data service like Dun & Bradstreet, or from other open data sources.

Segmentation

Keys to segmentation success

There's no such thing as "one size fits all" segmentation.

Create segmentations supporting what you sell, how you sell, and whom you sell to. Use data services to enrich data like job title, company revenue, number of employees, and industry. Make sure you remap enriched data to the custom fields you use for your segmentations.

Understanding technology considerations

You'll need at least a rules engine and a set of segmentation reference data. Consider how easy it is to adjust the segmentation rules. Will you need to change reference data or the rule configuration? If it's difficult to update the rules, it either won't happen, or it'll take considerable time—resulting in incorrect routing in the meantime. But if you don't maintain and constantly improve the rules, you won't get the


results you need. Does the solution require IT support or can a non-technical marketing person use it? Is the solution installed software or offered as a software as a service?

Choosing a platform

Advanced database segmentation, cleansing, and correlation are universal challenges for marketing, sales, and RevOps teams. Choose a modern, agile, and adaptable solution, and don't reinvent the wheel. Rather than creating dozens, or even hundreds, of segmentation rules manually, use a territory management automation platform to customize your logic. Take advantage of built-in reference data sets to simplify enrichment and achieve more precise segmentation with less effort.

The screenshot displays the Openprise platform interface, which is a territory management automation platform. The interface is organized into several sections, each representing a different segmentation recipe. At the top, there is a navigation bar with the Openprise logo and various menu items like Data, Automation, Analytics, and Administration. Below this, the main content area is divided into four distinct recipe cards, each with a title, description, tags, and a sequence of steps represented by numbered arrows. The first recipe is 'Marketeto People Cleansing', which involves steps like 'Set Up All Email Activities', 'Identify Latest Activity Per Email', 'Identify Emails Clicked Before', 'Set Up Occurrence Count', 'Sum Occurrence by Email', and 'Sum Occurrence by Domain'. The second recipe is 'Marketeto People Segmentation', which includes steps like 'Segment Job Function and Job', 'Segment IT Job Sub-Function', 'Segment Industry', 'Segment Company Size by', and 'Assign Persona'. The third recipe is 'Marketeto USA People Enrichment', which involves steps like 'Normalize ZIP Code', 'Append City, County, State', 'Copy Original State and City if', 'Infer ZIP From City + State', 'Append Urban & Metro Areas', and 'Enrich Address With Google'. Each recipe card also features a 'CREATE JOB FROM RECIPE' button. At the bottom of the interface, there is a 'PRIVACY POLICY' link on the left and a 'Copyright Openprise 2014-2020' notice on the right.

A territory management automation platform can streamline segmentation by making it easy to customize logic and take advantage of built-in reference data sets.



Account hierarchy

Sales teams selling to large enterprises, doing Account-based Marketing, or account ownership often group by account hierarchy or family, coordinating the selling effort across the group of related accounts. While data vendors like Dun & Bradstreet can provide legal entity hierarchies, making that data useful operationally requires infusing it with your specific business logic so the data fits your sales strategy. For example, one Openprise customer structures account hierarchies like this:

For US and Canadian accounts, the Head of the Family (HOF) is the Domestic Ultimate account designated by D&B:

- Except in the case when the Canadian Domestic Ultimate has a US parent, then the Canadian subsidiaries will roll under the US HOF.

In EMEA, the HOF is the head within a defined region; for example, for the BeNeLux region:

- If the Belgium Domestic Ultimate has a parent in The Netherlands, then the Belgium subsidiaries will roll under the Netherland HOF.
- If the Belgium Domestic Ultimate has a parent in Germany, then the Belgium Domestic Ultimate remains the HOF.

For APAC, the HOF is always the Domestic Ultimate account.

Without the ability to build and maintain accurate account hierarchy or family data, assigning an account or lead to an owner can be very challenging.

Account hierarchy strategies and best practices

- Decide internally among the organizational leaders how to structure accounts hierarchies. Consider your follow up strategy, how you sell to targeted accounts with multiple layers of subsidiaries and parent companies, as well as how you segment and assign territories.
- Use a territory management automation platform like Openprise to divide accounts into multiple layers of international and domestic parents, and subsidiaries based on your specific segmentation parameters.
- Make sure your territory management automation tool enables you to simulate various strategies before implementing. This will help you determine the best approach with the most balanced account ownership breakdown—without impacting live CRM data—streamlining approval and consensus from leadership.

Account hierarchy

Keys to account hierarchy success

Structure your hierarchies the same way you assign territories

If you assign territories to salespeople based on industry, segment accounts based on industry. If you assign territories based on a mix of geography and company size, structure your account hierarchies to reflect this strategy.

Tailor the hierarchy data from your enrichment providers to your needs

Enrichment providers don't deliver hierarchy data out of the box. It's often structured to reflect legal entities, holding companies, and the like. Apply your sales criteria to this data, for example, to ignore any subsidiaries or holding companies in an account with fewer than 100 employees. You can also use Head of Family (HoF) and domestic ultimate as illustrated in the previous example.

Don't rely on your CRM for account hierarchy

Most CRM and lead routing solutions can't define complex, or multi-level account hierarchy relationships—let alone route leads based on account level needs. Consider using a comprehensive territory management automation platform.

Simulate your new account hierarchies before deploying them

Testing your hierarchies will give you peace of mind that your new account designations are working as expected—and providing the best approach—before they go live. It'll streamline leadership approval.

The screenshot shows a CRM interface with a navigation menu at the top. The main content area displays an 'Account Hierarchy' for 'The Walt Disney Company'. The hierarchy is presented as a tree structure with columns for Account Name, Parent Account, OP Suggested P..., Account Owne..., Annual Revenue, Billing Country, OP Latest FTEs, and D-U-N-S Number. The current account is 'The Walt Disney Company'.

ACCOUNT NAME	PARENT ACCOUNT	OP SUGGESTED P...	ACCOUNT OWNE...	ANNUAL REVENUE	BILLING COUNTRY	OP LATEST FTES	D-U-N-S NUMBER
▼ The Walt Disney Company current			eking	\$69,570,000,000	US	201,000	117023169
▼ Tlcf Corporation	The Walt Disney C...	117023169	eking	\$30,400,000,000	US	21,700	
▼ Fox Entertainment Grou...	Tlcf Corporation	175778443	eking	\$432,926,047	US	12,500	
▼ Twentieth Century F...	Fox Entertainment...	147670608	eking	\$202,463,419	US	2,000	6991533
Twentieth Cent...	Twentieth Century...	6991533	eking	\$45,585,434	US	645	
▼ Twdc Enterprises 18 Corp.	The Walt Disney C...	117023169	eking	\$59,434,000,000	US	199,000	
▼ Disney Enterprises, Inc.	Twdc Enterprises ...	932660376	eking	\$25,640,914,590	US	133,000	6904700
Walt Disney Parks a...	Disney Enterprises...	6904700	eking	\$2,505,691,218	US	62,000	49759814
▼ Walt Disney Studios	The Walt Disney C...		eking		US		
▼ 21st Century Fox Animat...	Walt Disney Studios		eking		US		
Blue Sky Studios	21st Century Fox ...		eking	\$229,587	US	8	026833838
Pixar Animation	Walt Disney Studios		eking	\$69,570	US	19	
Walt Disney Animation S...	Walt Disney Studios		eking	\$69,570	US	19	

This example illustrates a multi-level account hierarchy. Most CRMs can't define these complex relationships. Consider a RevOps data automation platform to set up and run sophisticated account-level relationships and hierarchies like the one shown above.



Territory Planning

Territory planning is often a top-down financial exercise using a spreadsheet, which is a great starting point. However, to ensure the model output is supported by reality, we recommend you validate it with a simulation using actual pipeline and activity data to see the impact of new assignment rules on account and pipeline ownership. This works well if the territory management automation platform you're using can generate alternative output based on proposed new rules. From there, teams can compare their existing territory plan with the new plan based on the updated rules, and assess which is the better fit.

Territory planning strategies and best practices

- Start your territory planning exercise using a top-down spreadsheet.
- Assess your territory assignment criteria with leadership. Which segmentation factors do you want to use to drive territory divisions?
- Develop optimal territory plans, and simulate all of them using a territory management automation platform. Then based on simulation results, decide which one works best for your business's go-to-market strategy.

Keys to territory planning success

Simulating all territory changes in a sandbox before you deploy them is the best strategy to help you:

- Avoid interfering with live CRM data.
- Give management an opportunity to see the new territories based on updated territory definitions, account assignments, and lead routing rules.
- Inspire confidence that territory changes will work as expected when they go live.
- Gain signoff from senior leadership.

2 Intermediary processes

Intermediary processes depend on foundational processes being done properly. For example, to ensure the best lead-to-account matching results, you should start with cleaned and enriched lead and account data.

Lead-to-account matching

This is the process of matching a person record to an account record using a combination of company name, website and email domain, and address data. While you can do this in the context of Salesforce's unique separation of the Lead and Contact record types, you'll likely need to match a person record to account records from another system outside of the CRM, like the ERP or a company user database. This is a critical process in routing a lead based on account ownership, and it's also often used in account and lead scoring.

Once a person matches to an account, they're generally assigned to the account owner, although there are exceptions to this rule.

Lead-to-account matching strategies and best practices

Many lead-to-account-matching solutions merely look at email domains and apply fuzzy logic to identify an account. To yield more accurate matches, you need a lead-to-account matching platform that can:

- Analyze multiple fields to establish a match.
- Combine multiple approaches to finding the right match.
- Cross multiple languages.

- Eliminate black boxes by letting you tailor the logic to your unique environment, ideally with no coding required.

Your lead-to-account matching solution should be able to execute steps sequentially using the waterfall method. This technique begins by matching several fields at the same time, including domains, company names, corporate identifiers (like DUNS numbers), or any other fields that relate to your business. If there's no match on the first field, your platform should move on to other matching combinations in the sequence until there's either a match, or no match exists in the system.

Keys to lead-to-account matching success

Look for a platform that can match a lead to any custom data structure. You should be able to match leads not just to accounts, but also to buying groups and demand units in your sales automation and marketing automation solutions. The platform should be able to:

- Match based on any combination of criteria.
- Execute matches in multiple systems, enabling you to consolidate your tech stack.
- Continuously match behind the scenes so all your data remains up to date.

Partner deal registration

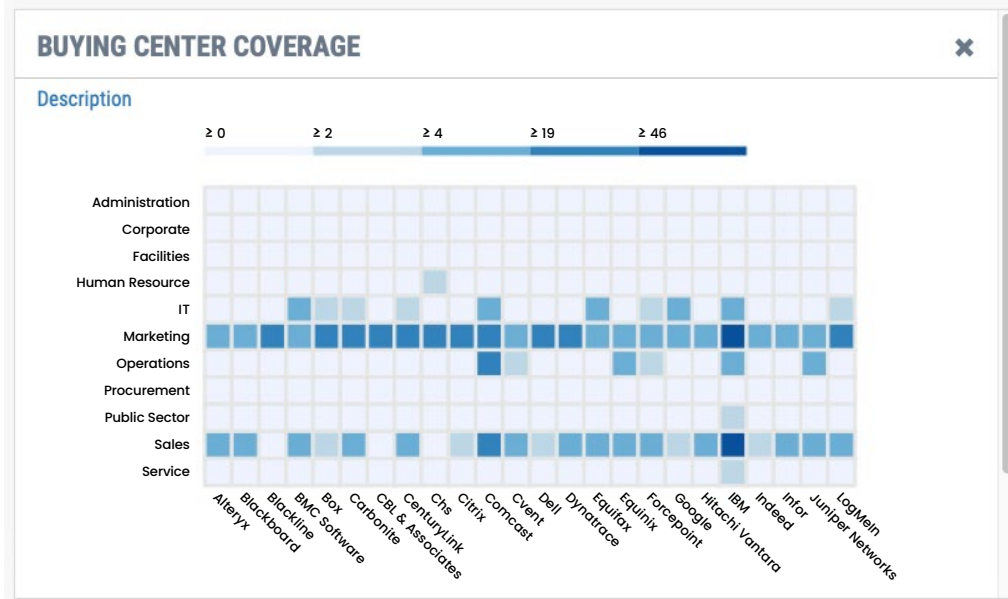
Companies that sell through channels must deal with a parallel universe when it comes to routing and assignments, often with an additional layer of complexity. For example:

- Deal registrations need to be assigned to a sales rep and a partner manager.
- Deal registration data contains at least account, person, product, opportunity, and partner data that need to be matched to CRM data.
- Deal registration routing processes usually involve extra review and approval steps.

To avoid conflict and inconsistency, use the same territory management automation platform to manage routing for both deal registrations and direct sales.

Partner deal registration strategies and best practices

- Make sure your lead routing tool is flexible enough to handle custom, situational logic.
- Customize routing flow for partner deal registration leads to accommodate the extra complexities, like additional manual reviews and required approvals.



A RevOps data automation platform can not only match leads to accounts, but also to demand units and buying centers.

Keys to partner deal registration success

Use a holistic platform to ensure successful partner deal registration—the same one you use for typical lead routing purposes. This is because it's very easy for partner deal registration to become siloed, as it's often handled in systems foreign or unfamiliar to the core team's business operations. This kind of fragmentation can lead to mistakes, including redundant follow up, and account record information becoming stranded and forgotten, and more.



Account carve and account assignment

Account carve, a term coined by the Salesforce Sales Ops team, is the process of assigning accounts to territories and sales reps. This process is a lot like lead assignment, except it often includes additional wrinkles—like manual steps and additional data management requirements. Here are some real-world examples, where your account carve can:

- Assign a named account to a territory by rule, but assignment to a rep within the territory requires a manual decision by the territory manager.
- Enable the federal sales team to claim accounts using domain, which requires a list of domains to drive automation.
- Match an account to the US Department of Commerce's Export Control Entity List, but require that the account runs through a validation process by the legal or compliance team.
- Require review and approval of new accounts by the Sales Ops team, but hold those accounts in a quarantine state until that happens.

Manual processes and interactions introduce errors, delays, and inefficiencies. Most routing technologies are simply automated rules engines, and hacking in manual steps to work with these rules engines can be very problematic. So a territory management automation platform should deliver fully integrated capabilities to enable precise and controlled orchestration of automated and manual tasks within your processes. Territory management automation should make it easy for users to participate in processes efficiently through delegated administration and self-service interfaces that are easy to use and fit to purpose.



Account carve and account assignment

Account carve strategies and best practices

One of the most important capabilities of any account carve or assignment process is flexible and distributed administration. Making it easy for every cross-departmental stakeholder to easily share, view, and edit the master account assignment and territory management plan increases usability and efficiency exponentially. New rep joins? Rep leaves? Patches or territories changing after SKO? No worries. Make all territory, routing, and assignment changes in minutes with an easy to set up and maintain process.

Let's take a look at a before and after scenario to see how implementing a territory management automation solution can transform a company's entire account carve process for the better:

Example #1: Company A

How they used to do things:

- To make territory changes, Sales Managers and IT would exchange a series of emails.
- Based on sales' requests for assignment changes, IT would manually edit the territory rules.

How they do things now:

- For named accounts, Company A automates territory assignment based on rules.
- Once accounts arrive in the correct territory, the regional sales manager assigns the accounts to a rep by hand, based on whatever logic they want to use.

Why it's an improvement:

- Instead of an IT administrator making changes, which can be a huge bottleneck, everything's now externalized into a spreadsheet or an easily accessible app that authorized users can update.
- This enables the regional sales managers who own the territory decisions to make the changes themselves, without any dependencies.
- Empowering the decision makers and removing the centralized dependency on IT provides a scalable and tailored process.

Example #2: Company B

How they used to do things:

- Federal sales teams claimed their accounts by a list of domains.
- IT maintained this list of federal domains.

How they do things now:

- Federal sales VP now manages the list of federal domains.
- This VP uses a Google Sheet or an externalized application to directly edit the list of domains.

Why it's an improvement:

- The VP of Sales and Regional Sales Managers can directly update and maintain their list of federal domains.
- Removing the dependency on IT speeds up routing of new accounts by an average of three to five days.

Account carve and account assignment

Account Carve
Americas USA Commercial - Commercial North - New England North

Region: Americas USA Commercial | SubRegion: Commercial North - New England North

Related **Details**

Account Carve Name	Americas USA Commercial - Commercial North - New England North - Geography - Sal	Carve Type	Geography
Customize Carve Name	<input type="checkbox"/>	Territory #	
Match Method	Auto	Record Type	Sales Team
Carve/Territory Report Link			
Sales Team Defining Criteria			
Complete Country	United States	Named Vt. Non-Named	
Partial Country		Named Account Type	
Complete State/Province	Maine, New Hampshire, Vermont, Rhode Island, Massachusetts	XGAP Classification	
Partial State/Province	New York	Industry Include	
County	[NY] Albany, Allegany, Broome, Cattaraugus, Cayuga, Chautauq, Chemung, Chenango, Clinton, Columbia, Cortland, Delaware, Dutchess, Erie, Essex, Franklin, Fulton, Genesee, Greene, Hamilton, Herkimer, Jefferson, Lewis, Livingston, Madison, Monroe, Montgomery, Niagara, Oneida, Onondaga, Ontario, Orange, Orleans, Oswego, Otsego, Putnam, Rensselaer, Saratoga, Schenectady, Schoharie, Schuyler, Seneca, St. Lawrence, Steuben, Sullivan, Tioga, Tompkins, Ulster, Warren, Washington, Wayne, Wyoming, Yates, Rockland	Industry Exclude	Government-Federal, Government-Higher Education, Government-K-12, Government-Local, Government-State, Healthcare Providers/ Hospitals
State County Split Tied to		Account Segmentation Include	
Postal Code		Account Segmentation Exclude	
City		Number of Employees	
Postal Code handling		Channel Segmentation	
Leaders			
System Information			

Frequent staffing changes and sales team churn make it difficult to keep account assignments up to date, so companies are turning to RevOps data automation platforms to fix their territory maintenance issues.

Account Carve
Americas USA Commercial - Commercial North - New England North

Related **Details**

Accounts (6+) New

Harris & Mortine Owne... Willis Type: Prospect - inactive Billing... New Hampshire	Lincoln & Associates Owne... Vaughn Type: Prospect - inactive Billing... Connecticut	PRIZM Group Owne... Carson Type: Prospect - inactive Billing... Connecticut
Mid Atlantic Insurance Owne... Thompson Type: Prospect - inactive Billing... New Hampshire	Elevate Hosting Owne... Santos Type: Prospect - Customer Billing... Massachusetts	Infintix Wireless Owne... Mascotti Type: Customer Billing... Rhode Island

[View All](#)

Account Carves (6+)

Account Carve Name	Territory Owner	Territory Owner Active	Match Method
Commercial North - New En...	Jon Craft	<input checked="" type="checkbox"/>	Auto
Commercial North - New En...	Katy Wright	<input checked="" type="checkbox"/>	Auto
Commercial North - New En...	Luis Cruz	<input checked="" type="checkbox"/>	Auto
Commercial North - New En...	Doug Benton	<input checked="" type="checkbox"/>	Auto
Commercial North - New En...	Michelle Cook	<input checked="" type="checkbox"/>	Auto
Commercial North - New En...	James Carter	<input checked="" type="checkbox"/>	Auto

[View All](#)

Account Carve History (0)

Using a RevOps data automation platform streamlines staffing changes. Sales managers only need to change the name of the person in the carve to update territory ownership.

Account carve and account assignment

Keys to account carve and account assignment success

One of the most important capabilities for any well-structured account carve process is the ability to simulate changes before pushing them live. Performing these simulations in a dedicated sandbox with a territory management automation platform gives you the peace of mind that your assignment changes will work as expected. Let's consider two examples. The first, a company that doesn't simulate changes prior to deployment, and the second, a company that does:

Example #1:

Use a dedicated planning tool

- Customer Z uses generic data, like all companies in the NASDAQ, to see what a good territory breakdown looks like.
- Customer Z does what they can with the limited data available, and hopes that nothing breaks when they deploy their new assignments.

Example #2:

Use a territory management automation platform

- Company A wanted to change from a lead-centric model to an ABM model, but sales leadership wasn't on board with the ABM strategy.
- Company A ran their existing account and contact data through their updated account assignment rules to simulate the new territories.
- Company A could see the "before" and "after" as a side-by-side comparison that showed territory allocation and any impact to sales reps.
- After modifying the plan and arriving at a fair and equitable territory plan, Company A pushed the new rules into production.
- Simulating all of this in the territory management automation platform's sandbox without altering live CRM data was key to testing, iterating, and devising a successful territory plan.

3 High-level processes

Successfully managing high-level processes requires most of the foundational and intermediary processes to be in place.

Lead routing

This is the tip of the iceberg—the most visible point above the surface, and often the biggest focus for organizations. It’s difficult to achieve scalable lead routing if the foundational processes aren’t buttoned up. This doesn’t mean you have to have all the foundational and intermediary processes perfect before you automate lead routing. It means that to do it well may take more time and resources than you think. It may be more pragmatic to do “just enough” of the foundational and intermediary work to get lead routing automated to an acceptable service level, then iterate and improve throughout the layers.

Lead routing strategies and best practices

- Clean, enrich, segment, and match your leads to accounts and buying groups before routing them to maximize precision.
- Execute lead routing in a dedicated platform, so you don’t bog down your sales and marketing automation systems.
- Select a dynamic and adaptable platform that makes it easy for you to make changes on the fly and keep up with constantly changing territory assignments. Avoid hard-coded routing logic that can agility and the ability to scale.

Here’s an example of how one company used territory management automation to streamline its lead routing process from 40 hours to just five minutes:

Situation:

- A fast-growing organization with 2,000 employees and more than 100,000 customers worldwide, Company Z had its eyes set on becoming the de facto CRM solution for the SMB segment.
- The operations team couldn’t efficiently route leads. Each territory had unique requirements, making it impossible to standardize on one centralized lead flow process.

- With a rapidly changing 900-person sales team, more than 100 staffing changes per year, and 10–20,000 leads to route every day, maintenance to the territory routing rules was constant and resource-intensive.
- To manage the churn, the company implemented a cumbersome manual process, hiring a team of 50 just to clean and enrich leads before routing them manually based on hard-coded and static logic.

Action:

- Company Z turned to territory management automation to solve its lead routing issues, building a unique routing process for each territory: nine variations to cover their global operations.
- This process included 15 data quality checks per lead with cleansing, dedupe, and enrichment, before routing any lead.
- This process properly segmented all the leads and ensured their delivery to the correct territory.

Results:

- Reduced lead routing times from 40 hours to five minutes—a 320x improvement.
- Eliminated the expense of 50 employees who previously cleaned, enriched, and routed leads manually.
- Automated, streamlined, and centralized sharing, maintenance, and adjustments of master territory and lead routing assignments.

Lead routing

Keys to lead routing success

According to Harvard Business Review’s [The Short Life of Online Sales Leads](#), “Firms that tried to contact potential customers within an hour of receiving a query were nearly seven times as likely to qualify the lead as those that tried to contact the customer even an hour later.” Clearly, when it comes to routing success, speed-to-lead is second to none. Here are a few of the most instrumental factors towards lead routing success:

- **Speed is supreme.** The faster you follow up, the higher conversions and more success you’ll have. Don’t let a hot incoming lead get stuck in a batch process waiting for 300 leads to route ahead of it.
- **Go-to-market strategy fit.** Many lead routing vendors will say they support exotic and trendy lead routing methods. But chasing the “hot” or brand new routing technique is rarely the answer. Every company requires a different set of routing rules based on its specific sales and go-to-market strategy. Rather than get caught up in the latest trends, instead, think critically about how all of the routing techniques and parameters at your disposal can best support your sales strategy. When it comes to lead routing, customization is key. Choose a platform that can accommodate customization.
- **Flexibility in routing parameters.** The more parameters your lead routing solution supports, the more you can tailor your routing program. If your territory management automation platform can handle parameters like geography, language, account, score or grade, product, industry or business unit, you should be able to handle every major lead routing method out there.
- **Simulate changes before they go live.** There’s a lot on the line with lead routing. The last thing you want to do is push a change or modification to your lead routing program and have things break, since this can directly impact revenue. Instead, find a platform that enables you to simulate and test routing changes in a sandbox environment before pushing them live. That way, when you finally deploy your routing changes, you can be sure that everything works correctly.
- **Easy to access, share, and edit routing rules.** Externalizing your routing rules into an application or spreadsheet where authorized stakeholders can easily and quickly edit rules to accommodate staffing changes, sick days, leaves of absences, and other organizational changes, helps you increase routing agility exponentially.

Rule Type	Territory Name	Country	State Province	Postal Code Min	Postal Code Max	SDS Email	AE Email	Alphabet
Special	Analyst							
Special	Investor							
Special	Partner							
Special	Media							
Special	Vendor							
Special	Competitor							
Special	Technology Partner							
State	Northeast	United States	New York, Massachusetts, New Hampshire, Vermont, Connecticut, Maine, Rhode Island					
State	Mid Atlantic	United States	Delaware, Maryland, Pennsylvania, District of Columbia, Virginia, West Virginia, New Jersey					
State	Great Lakes	United States	Ohio, Michigan, Indiana					
State	Southeast	United States	Florida, Georgia, Mississippi, North Carolina, South Carolina, Puerto Rico					
State	Central South	United States	Alabama, Arkansas, Kentucky, Louisiana, Missouri, Oklahoma, Tennessee, Texas					
State	Central North	United States	Illinois, Iowa, Kansas, Minnesota, North Dakota, South Dakota, Wisconsin, Nebraska					
State	Mountain	United States	Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming					
Postal Code	SoCal	United States	California	90000	93499			
Postal Code	NoCal	United States	California	93500	90054			
State	Pacific	United States	Alaska, Hawaii, Oregon, Washington					
Country	Canada	Canada						
Alphabet	A to C							a, b, c
Alphabet	D to J							d, e, f, g, h, i, j
Alphabet	K to Q							k, l, m, n, o, p, q
								r, s, t, u, v, w, x, y, z

Using a RevOps data automation platform to externalize routing rules and assignments into a spreadsheet enables regional sales managers to update rules instantly to manage staffing changes.



Scoring and grading

Scoring and grading measures the quality of the lead or how closely an account matches the ICP. Scoring and grading are integral parts of territory management in two ways:

- For companies using Account Based Marketing (ABM) go-to-market tactics, accounts are usually graded to assign the most experienced sales reps to the highest grade accounts. So account and lead assignment can both require grading as input.
- Some companies use a meritocracy-based routing scheme, which means the highest quality leads, whether based on demographic or behavioral scoring, are sent to the highest-performing sales reps.
- Ask any salesperson—an active buyer is much more valuable than a person showing only persistent interest. So we recommend you make the distinction in your scoring model.
- The value of all engagements decays over time, and some engagements decay faster than others. To properly calculate time-based decay, we recommend you rescore each unique engagement type every day based on custom decay rates.

Scoring and grading strategies and best practices

- Score and grade leads, accounts, and buying groups (departments or teams within accounts).
- Clean, normalize, and segment your data before scoring it for the most accurate results.
- Break scoring down into a few key sections:
 - Demographic or technographic scoring
 - > This measures how closely a person, a buying center, or an account fits your ICP.
 - > To produce a demographic score you need two things: ICP and segmentation dimensions.
 - Behavioral scoring
 - > **Interest level** measures whether a prospect demonstrates a general level of interest in your solution and related topics.
 - > **Buyer activity** measures whether a prospect is actively looking to buy something at this moment.
- Once you've calculated your scores, disseminate them back to your systems, like: CRM, help desk, and call center applications, marketing and campaign automation applications, database and data warehouse or reporting platforms, data science platforms, and partner platforms.



Scoring and grading

Keys to scoring and grading success

- **Don't just score leads.** Also score accounts and buying centers (units, departments, and teams within accounts). These metrics are critical for ABM and for converting and upselling your target accounts.
- **Don't just focus on demographic scoring.** Behavioral scoring is just as important.
- **Score data from a diverse set of systems.** Scoring just website and email activity, as many scoring programs do, isn't enough. It doesn't take into account the many channels that a prospect uses to engage with your brand. Make sure you're scoring across all your platforms, like sales, marketing, and business intelligence platforms, third-party intent signals, custom object data, and analytics from customer support, HR, and finance systems. You can even incorporate activity data in platforms like SalesLoft and your own product's free trial and demo data.
- **Select a flexible platform that can execute various scoring models.** The more scoring methods you have available to you, the better. That way, you have options for finding the best model for your company's lead and account qualification criteria.
- **Run multiple scoring models simultaneously.** Most marketing automation solutions only enable you to create one model at a time. Use a territory management automation platform that lets you create and run multiple scoring models simultaneously. If you do, you can experiment with different models until you find the one that works best for your business. Learn more by testing more, and testing faster.

What does it all mean?

Lead routing is a ubiquitous process, but it's rarely automated well. To achieve a high level of operational excellence with territory management automation, companies can either try to make it work by using a collection of point solutions, or consider using an integrated RevOps data automation platform like Openprise, a single, no-code platform that automates the entire set of processes on a single technology platform.

About Openprise

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www.openprisetech.com

The Openprise RevOps Data Automation Platform fuels company growth by automating hundreds of sales and marketing processes, helping RevOps teams realize the value promised from their RevTech investments. Openprise is a single, no-code platform that can help to simplify even the most complex RevTech stack. For more information, please visit www.openprisetech.com.