



BAO GUIDE TO TERRITORY OPTIMIZATION

There are several ways organizations carve up territories – common approaches include assigning territories by geography, vertical, product or named accounts. But while these categories make sense from a management perspective, they don't take into account where the deals are.

The truth is, it doesn't matter how many *accounts* a rep has, what matters is the number of *actual prospects*. To be truly effective, territory planning requires insight into where there is real opportunity – and where there's not.

This guide lays out best practices for improving territory planning and applying the insight gained throughout your organization.

IT STARTS WITH ACCOUNT INTELLIGENCE

BAO delivers intelligence about your territories via the [BAO Intelligence Center](#): customized, account-level insight into the specific markets and companies that matter most to your organization – allowing you to optimize territories to maximize pipeline potential.

HOW DO YOU GET THERE?

A truly optimized sales territory has the right sales reps with the right skills in the right places. Overstaffing a territory lowers the productivity of your team, while understaffing leads to

incomplete coverage – which can cost you deals. But it's not just about getting the number right – you also need to have the right people in place, so you can effectively close sales and generate pipeline.

Territory optimization requires detailed insight that reveals where the opportunities are in the market and what you need to do to win those deals. BAO can provide that critical information to help you strategize, plan, and staff around market opportunities.



BAO conducts live phone profiling to identify where the short- and long-term sales opportunities are, as well as key characteristics about those opportunities to help you align your sales team's strengths for maximum effectiveness.

Custom research, conducted at the individual account level, gives you a detailed, real-time snapshot of your territories with data points you can pivot geographically, vertically, or by product. You get the information you need to optimize territories around sales opportunities to align the appropriate resources in the right places to maximize your pipeline potential across all your sales territories.



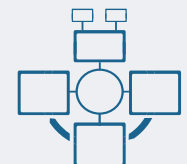
MAP OF FUTURE OPPORTUNITIES AND IDENTIFIED BUYERS



PAINS AND CHALLENGES



CURRENT AND FUTURE BUDGETS AND PURCHASING CRITERIA



INSIGHT INTO TECHNOLOGY ENVIRONMENTS

BEST PRACTICES FOR OPTIMIZING TERRITORIES

Opportunity-based territory optimization has impact far beyond pipeline generation. When the account-level intelligence is applied across the organization, it can have far-reaching effects on hiring, training, campaign planning and more.

Align sales resources effectively for maximum productivity

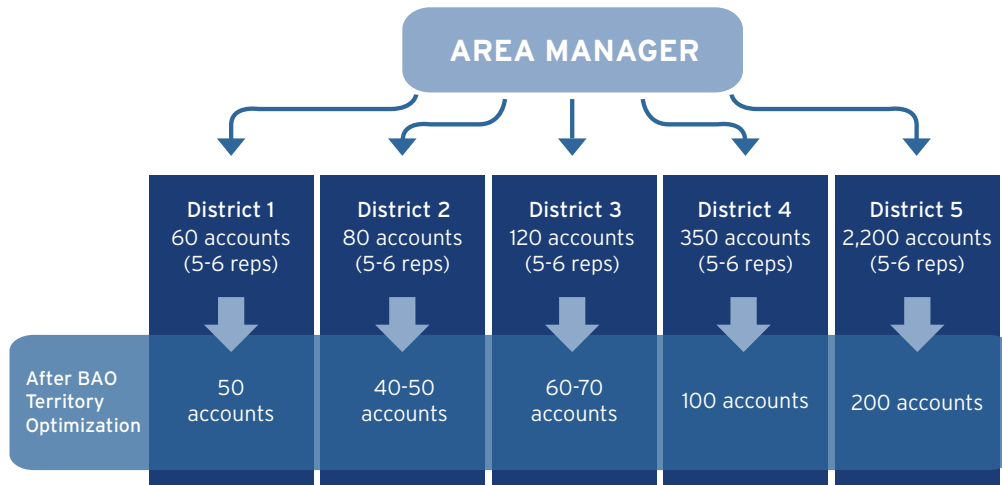
Without insight into where the opportunities are, it's hard to determine which territories have real sales potential. Adding overhead doesn't make sense if there isn't revenue opportunity to support the associated expenditures.

One Client – a global technology giant – had a problem that's endemic in sales organizations. Through acquisitions and the addition of new product lines, the sales team was buried under too many accounts and "leads." And they never had enough time or resources to find out – and focus on – which ones mattered.

The typical solution for this problem is to throw more bodies at it. But the problem with that "solution" is that it doesn't really solve the problem – it just makes it bigger. Rather than spending millions of dollars to hire new reps and managers to ensure territory coverage, you can use account-level intelligence to better align the sales resources you currently have.

Effectively troubleshoot sales "problems"

When you have a sales problem, it can be difficult to determine the cause. Are you dealing with a bad territory or is the rep's skill set simply not appropriate in a given area? With account-by-account intelligence, sales managers can get to the truth faster – and adjust strategies and resources to fix the problem before it creates an ongoing impact on pipeline.



This diagram illustrates the Client's district-by-district breakdown – for reps and accounts – before and after working with BAO for territory optimization.

The BAO Intelligence Center provides custom, account-level intelligence that delivers insight about your sales territories that can be applied across your organization.

WHO WILL USE THIS INTELLIGENCE?

- Executive management
- Sales leadership
- Sales operations
- Marketing leadership
- Field marketing

Run more effective marketing programs at the territory level

Armed with this level of intelligence, the marketing team is able to create and execute programs based on the real-time needs of the target market – territory by territory. Every campaign that goes out the door reaches true prospects with the right messages that map directly to buyers' pains and challenges.

Attract and retain the best of the best

Sales people need more than just good comp plans, they need to have the real potential to meet and exceed their quotas – even the best sales reps can't close deals that don't exist. In the high-tech industry, a new rep (including the support staff and administrative and operational expenses associated with that rep) typically costs more than \$500,000. Each hire made into the wrong territory costs the organization money – and the opportunity to better deploy that money more productively.

When hiring against real opportunity, you have the ability to staff more effectively because an optimized territory means knowing exactly how many hires are necessary and in which areas – no more guesswork. And you have a recruiting edge by offering territories flush with legitimate sales opportunities. Employees whose skills are well matched to their positions are happier – and happier employees = reduced turnover.

And more – across your organization

The insight you need to fully optimize sales territories can also be applied throughout your organization for more effective training, program development, and resource allocation.

LEARN MORE

For more information about how BAO's custom account-level intelligence can drive more efficient territory strategies and planning – and will improve operations across your organization – contact us today at info@baoinc.com or 978-763-7500.

HOW IT WORKS: BAO TERRITORY OPTIMIZATION EXAMPLE

By conducting live, in-depth profiles, BAO was able to immediately disqualify more than 700 of the accounts. Some companies didn't exist or had been acquired. Some didn't have IT in-house. Some were far too big or too small for his territory's segment.

BAO gathered real-time market intelligence that met the Client's criteria – prospects' technology infrastructures, current pain points, buying plans, budgets, timelines and decision makers.

The BAO team segmented the Client's market based on the real buying behaviors that emerged during the profiling phase. Within those 450 accounts, BAO was able to identify more than 1,100 budgeted initiatives – and delivered the specific, account-level detail they had gathered during profiling.

1,500 accounts provided

700 accounts
immediately disqualified
(due to "dead" data)

450 accounts profiled

1,100
opportunities
identified
(budgeted initiatives)

ABOUT BAO

BAO is the de facto partner for sales and marketing teams in the high-tech industry developing powerful, profitable go-to-market strategies. BAO gives organizations the real-time insight, tools, and resources they need to transform their businesses – to drive new revenue while increasing the profitability of existing accounts; to optimize sales and marketing operations; to kill the competition; or all of the above. Founded in 1997, BAO is based in Andover, Massachusetts. Learn more at www.baoinc.com.

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