

# Territory Management Platform

## Evaluation Criteria

RATE THE MUST-HAVE FEATURES FOR YOUR ORGANIZATION'S TERRITORY MANAGEMENT

Feature	Importance	Rating	Final Vendor A Rating
	0-1; 0 is not required; 1=extremely important	1-5; 1=Poor; 5=Excellent	
<b>Territory Planning</b>			
Set-up complex territory hierarchies (e.g., geographic, seniority level, industry, product(s), account / customer value size, and more)	0.50	5	2.5
Optimize territories based on various data inputs (e.g., propensity, ARR, health score, license count, # teams, regional trends, crystal ball forecasting)			0
Conduct what-if scenario modeling for territory plans			0
Collect field input on territory plan directly in the tool			0
Visualize territories on map			0
AI/machine learning to develop territories			0
<b>Quota and Target Setting</b>			
Plan quotas and/or targets based on various data inputs (e.g., historical performance, marketing opportunity, propensity, crystal ball forecasting, ARR under management)			0
Align Finance & field quotas to be 1:1, and logically roll-up into each other			0
Conduct what-if scenario modeling for quota plans.			0
Flexibility to manually overwrite model output and deliver custom quota			0
Track plan versus actual in real time at all levels			0
<b>Capacity/Headcount Tracking</b>			
Define role profiles and assign roles to the appropriate territories			0
Design ramp-based productivity profiles, with ability to customize			0
Track Roles by "Net Ramped," "To be Hired," and "To be Replaced" for capacity management			0
<b>Policy Setting</b>			
Set routing policy for leads, contacts, opportunities, cases, accounts) in alignment with territory plans			0
Set, manage, and visualize account hierarchies, parent/child relationships			0
Define and enforce holdout policies with ability to customize via region or segment			0
Set and enforce dedupe policies			0

	Set and enforce industry taxonomy			0
	Set and enforce sales compliance process to factor trade embargo and GDPR compliance			0
<b>Continuous Runtime Management</b>				
	Update territories on a run-time basis, due to headcount or other changes			0
	Update roles and assignments on a run-time basis, due to headcount or other changes			0
	Update quotas and targets on a run-time basis due to headcount changes			0
	Automatically re-align territory and quota changes with compensation and forecasting tools.			0
	Automatically re-align territory changes with routing (leads, contacts, opportunities, cases, accounts)			0
	Automatically sync all run-time changes with the CRM			0
	Effective date all plan changes to provide a single source of truth and simplify commission payments			0
<b>Data Hygiene</b>				
	Flag data quality issues			0
	Provide insight into data quality on key fields used to build segmentation			0
<b>System Integration</b>				
	Bilateral sync with CRM			0
	Synch and import data from all other relevant tools (Snowflake / Hive)			0
<b>Metrics Reporting</b>				
	Track performance to plan at all levels			0
	Build custom dashboards			0
	<b>TOTAL</b>			<b>2.5</b>