

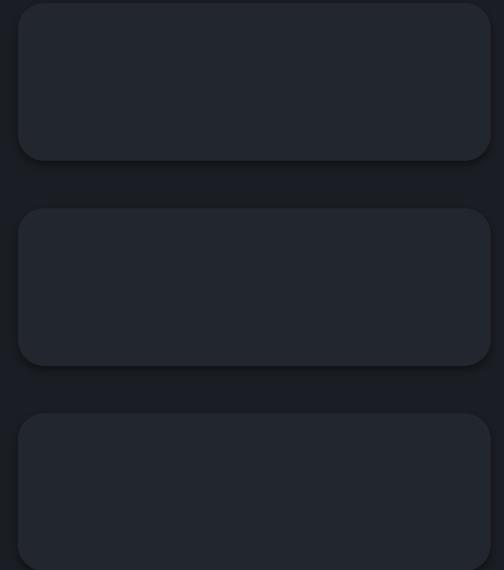
NORTHSTAR SAAS

# Territory Design & Account Coverage Model

A sample territory planning model showing how accounts can be segmented, assigned, and rolled up to improve coverage and reduce overlap.

Revenue Operations | Q2 FY25

SAMPLE MOCKUP



# The Problem with Territory Design

Poor territory design creates uneven workloads, account confusion, coverage gaps, and inconsistent performance across teams.

## Uneven Workloads

Top reps carry 2-3x the accounts of bottom reps. Burnout risk increases, quota attainment drops.

## Account Confusion

Overlapping ownership between AEs and CSMs creates friction. Customers get contacted by multiple reps.

## Coverage Gaps

High-potential accounts sit unassigned or in pooled buckets. No proactive outreach strategy.

## Inconsistent Performance

Managers cannot fairly evaluate reps when territories vary wildly in quality and volume.

My Approach: This mockup demonstrates how I think about account segmentation, ownership logic, and rollup structure to create a cleaner, more scalable coverage model.

# Account Segmentation Criteria

Accounts are segmented by ARR potential, employee count, and strategic fit. Segmentation drives assignment rules, coverage model, and capacity planning.

Segment	ARR Potential	Employee Count	Typical Deal Size	Sales Motion	Assigned To
Enterprise	\$200K+	5,000+	\$180K ACV	Named accounts, high-touch	Enterprise AE
Mid-Market	\$50K - \$200K	500 - 5,000	\$85K ACV	Named + territory-based	MM AE
SMB	<\$50K	<500	\$18K ACV	Pooled / round-robin	SMB AE
Strategic	\$500K+	10,000+	\$420K ACV	Named, exec-sponsored	Strategic AE + overlay

## Additional Segmentation Signals

### Industry Vertical

FinTech, HealthTech, Manufacturing prioritized based on ICP fit and win rate history.

### Geographic Region

AMER (60% of TAM), EMEA (25%), APAC (15%). Timezone alignment matters for CSM.

### Technology Stack

Accounts using compatible platforms get priority scoring. Integration readiness accelerates deals.

# Account Assignment Rules

## Ownership Models

### Named Accounts

Enterprise and Mid-Market accounts are assigned to named AEs.

Assignment criteria:

- Geographic alignment (primary)
- Vertical expertise match
- Existing relationship / renewal ownership
- Balanced by total addressable ARR, not count

Named accounts cannot be reassigned without manager approval and 30-day transition plan.

### Pooled Accounts

SMB accounts are pooled by region and distributed via round-robin with capacity limits.

Distribution rules:

- Max 80 active accounts per SMB AE
- Round-robin resets monthly
- Inbound leads assigned to account owner (if exists)
- Unworked accounts recycled after 60 days

CSMs handle renewals for all pooled accounts via a tech-touch / digital motion.

## Ownership Matrix

Scenario	New Biz Owner	Renewal Owner	Expansion Owner
New logo, single dept	AE (by territory)	CSM (post-close)	AE (original)
New logo, enterprise-wide	Enterprise AE	Enterprise CSM	Enterprise AE
Existing customer, new dept	AE (by territory)	CSM (existing)	AE (original) or CSM
Renewal, no expansion	N/A	CSM	N/A
Renewal + expansion	N/A	CSM (renewal)	AE (split credit)
Parent-child (multi-entity)	AE (parent owner)	CSM (per entity)	AE (parent owner)

## Coverage Model by Team Type

Role	Segment	Named Accounts	Quota	Avg Deal Size	Deals to Close	Region
Enterprise AE	Enterprise	15-25	\$1.2M/yr	\$180K	7-8	AMER / EMEA
Mid-Market AE	Mid-Market	40-60	\$800K/yr	\$85K	9-10	AMER / EMEA
SMB AE	SMB	60-80 (pooled)	\$500K/yr	\$18K	28-30	AMER
Strategic AE	Strategic	5-8	\$2.0M/yr	\$420K	4-5	AMER / EMEA
CSM (Enterprise)	Enterprise	20-30	\$1.5M GRR	N/A (renewal)	20-30	AMER / EMEA
CSM (MM + SMB)	MM + SMB	50-80	\$1.0M GRR	N/A (renewal)	50-80	AMER
BDR	All	Assigned by AE	N/A (pipeline)	N/A	4-6 SQLs/mo	AMER / EMEA

### Key Coverage Assumptions (Coverage will vary by our Company Profile & Sales Cycle)

#### AMER

18 AEs, 12 CSMs, 8 BDRs

60% of total pipeline

**3.4x coverage**

#### EMEA

8 AEs, 5 CSMs, 4 BDRs

25% of total pipeline

**3.1x coverage**

#### APAC

4 AEs, 3 CSMs, 2 BDRs

15% of total pipeline

**2.4x coverage**

## Example Hierarchy & Rollup

Territory rollups follow the org hierarchy: Rep > Manager > Director > VP/CRO. Each level aggregates pipeline, quota, and forecast from the level below.



Each level rolls up pipeline, forecast, and quota. Parent-child account hierarchies follow the same rep assignment as the parent entity.

## Parent-Child Logic & Edge Cases

Scenario	Rule	Example
Parent + child in same segment	Same AE owns both. Single territory assignment.	Vertex Corp (parent) + Vertex Labs (child) both Enterprise > AE owns both.
Parent = Enterprise, child = MM	Enterprise AE owns parent. MM AE owns child. Warm intro required.	Summit Group (Ent) owns Pinnacle Div (MM). Enterprise AE introduces MM AE.
Multi-region parent	Parent assigned to HQ region AE. Child entities follow local region.	GlobalTech HQ (AMER) > AE in AMER. GlobalTech EU (EMEA) > AE in EMEA.
Acquisition / merge	Acquired entity inherits parent AE. 90-day transition if different owner.	Beacon acquires Spark. Beacon AE takes over Spark accounts after transition.
Churned account, new opportunity	Returns to original AE for 12 months. After 12 months, treated as new logo.	Atlas churned in Q1. If they return in Q3, original AE gets the deal.

### Conflict Resolution Process

1

#### AE raises conflict

Rep identifies overlap or unclear ownership via #territory-disputes Slack channel.

2

#### Manager review

Both managers review account history, activity, and assignment rules within 48 hours.

3

#### RevOps arbitration

If unresolved, RevOps reviews data (activity, pipeline, relationship) and makes final call.

4

#### VP escalation

Rare. Only when >\$200K ACV at stake or cross-region dispute.

# Why Territory Design Matters

Thoughtful territory design improves rep focus, reduces account conflict, supports fairer planning, and gives leadership a stronger foundation for forecasting and performance management.

## ● Rep Focus

Clear ownership eliminates account confusion and lets reps focus on selling, not debating.

## ● Fair Evaluation

Balanced territories by ARR potential (not just count) enable fairer quota and performance mgmt.

## ● Better Forecasting

Clean rollups from rep to region give leadership an accurate, bottom-up view of the business.

## ● Scalable Growth

Defined rules make it easy to add reps, expand regions, and split territories as the org grows.

This is a sample mockup created to demonstrate my approach to territory design and account coverage. It does not contain confidential or proprietary information. Northstar SaaS is a fictional company.