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A territory is a workload model, not a map

A territory is not a polygon around accounts. It is a workload model that makes potential, information work, travel, and selling time visible.

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MANAGEMENT SUMMARY

A territory map tells you where accounts sit. It does not tell you what the assignment asks of the person carrying it. Salesforce research connects territory formation with account potential, information gathering, travel, selling effort, performance standards, and management feedback. Analytical models allocate effort to smaller control units before those units are aggregated into territories. Other work treats information gathering as time that competes with selling, while frontier benchmarking separates productivity gaps from geographic reallocation and force-size changes. These are not universal territory formulas. They are reasons to treat a territory as a workload model with explicit assumptions. This research note gives a public-literature framework for checking those assumptions without using private account data or recommending a fixed number of people or accounts.

Keywords: Territory design · Sales force management · Workload allocation · Selling effort · Customer information

A territory is a workload model before it is a map. The map supplies geometry. The workload model asks what each assignment contains: account potential, information work, travel, service burden, and the selling time that remains after those demands are paid.

That distinction changes the planning question. Instead of asking how many accounts belong in a territory, ask which activities consume the person's available time and whether two assignments carry comparable work. A territory can be geographically compact and operationally heavy. It can also be large on a map and light in the work that matters.

Why does effective territory assignment depend on workload rather than geography?

Beswick and Cravens place force size, effort allocation, territory formation, forecasting, and performance standards in one analytical sequence (Beswick & Cravens, 1977). Their model starts with smaller geographic control units and aggregates them into territories. The point is not that every firm should copy the sequence. It is that a territory is built from underlying work units, not discovered by drawing a polygon around a list of accounts.

Darmon makes another part of the workload visible. Customer-information work competes with selling time, and the amount and quality of information affect the reasoning about territory and force size (Darmon, 2002). A salesperson who has to learn a poorly documented account base is carrying a different assignment from one whose customer information is current and easy to retrieve.

Which distinct territory constructs does empirical literature separate?

The following is a synthesis of the held studies, not a scoring model. Each row is a question to answer before a territory comparison is treated as fair.

Table 1 What a territory carries

Work object	Question for the assignment	What the held research contributes	What it does not prove
Account potential	What demand or opportunity is assigned?	Analytical territory models begin with smaller control units and potential estimates.	A potential estimate is not realized sales.
Information work	How much time is needed to learn, qualify, and update the accounts?	Information gathering can compete directly with selling time.	More information work is not automatically waste.
Travel and service	What time is consumed by distance, visits, support, and local coverage?	Territory design is linked to structural appropriateness and organizational outcomes in survey work.	Satisfaction does not establish causality.
Selling effort	Which actions receive the remaining capacity?	Effort allocation and territory formation can be modeled together.	No model supplies a universal call or visit quota.
Performance evidence	Which behaviour and outcome are being judged?	Research distinguishes behavioural performance, outcome performance, and organizational effectiveness.	One outcome cannot validate every workload assumption.

Author's synthesis of Beswick and Cravens (1977), Darmon (2002), Horsky and Nelson (1996), and Piercy, Cravens, and Morgan (1999). The rows are measurement prompts, not a validated territory score.

Why does a geographic territory map obscure sales relationship workload?

The reason information deserves its own row is practical. A new or poorly documented account base can demand research before a salesperson can make a useful call. The cost is not visible in the account count. It appears as less time for selling, slower qualification, more repeated work, or a greater dependence on informal memory.

Darmon's application uses one mechanical-parts supplier and 25 salespeople (Darmon, 2002). The model then produces a historical recommendation that is specific to its assumptions and was not implemented. That boundary is part of the result. The paper shows how information can enter the territory problem. It does not give a portable answer to how large a territory should be.

Horsky and Nelson offer a complementary decomposition. Their frontier approach separates possible productivity improvement, geographic reallocation, and force-size changes in two firm applications (Horsky & Nelson, 1996). A territory that looks weak may therefore need a different assignment, a different work process, or a different amount of capacity. The map alone cannot tell you which one.

When is rep satisfaction an unreliable guide to territory performance?

Piercy, Cravens, and Morgan report relationships between territory-design satisfaction, behavioural performance, outcome performance, and organizational effectiveness in a cross-sectional UK sample (Piercy et al., 1999). That makes satisfaction worth recording. It does not make satisfaction a causal proof that one map caused an outcome. A person can be satisfied because performance is strong, because the assignment is fair, or because the comparison standard is weak.

The useful operational move is to keep the signal and the interpretation separate. Record what the person says about the assignment. Record the observable workload that might explain it. Then record the behaviour or outcome that would challenge the explanation. That is enough to turn a map into a testable workload object without pretending that the literature provides a local answer.

How should sales leadership test capacity before redrawing territories?

Take two territories and write one line for each work object in the table. Do not start with the boundary. Start with potential, information work, travel and service, selling effort, and evidence of performance. If one row is blank for both assignments, the missing field is itself a planning finding.

Then ask a narrow counterfactual: if the boundary moved, which row would change first? If the answer is none, the redraw is geometric rather than operational. If the answer is information work, the next intervention may be better data or onboarding. If it is travel, the next intervention may be coverage design. If it is selling effort, the force-size question may be downstream.

How does commercial leadership translate account objects into actual rep capacity?

The five work objects become useful when they are connected to time. Account potential says what could be worth attention. Information work says what must be learned before attention is useful. Travel and service say what capacity is consumed before a selling action occurs. Selling effort says what remains available for the next opportunity. Performance evidence says which result is being used to judge the allocation. None of those rows is the same as an account count.

Beswick and Cravens place force size, effort allocation, territory formation, forecasting, and performance standards in one model (Beswick & Cravens, 1977). The architecture suggests a disciplined order: define the smaller work units, estimate what each asks of the force, allocate effort, then aggregate into a territory. It does not supply a universal conversion from accounts to hours. The conversion remains an assumption to expose.

A reader can therefore write a capacity statement without claiming a local benchmark: available selling time equals usable time after service, travel, information work, and required coordination. The statement is valuable even when the numbers are not yet known. It identifies which missing measurement prevents a fair comparison and stops the map from carrying a precision it has not earned.

Boundary choices change the result

Territory design is not only a choice about lines on a map. It is also a choice about which accounts are grouped, which service level is promised, which travel is acceptable, and which information work is centralized or left with the salesperson. Change one of those rules and the assignment changes, even if the geographic boundary stays in place.

Horsky and Nelson separate productivity improvement, geographic reallocation, and force-size changes through frontier benchmarking in two firm applications (Horsky & Nelson, 1996). That decomposition is a useful question set for a territory review. If the observed gap is attached to a weak information process, moving the border may reproduce it. If the gap is attached to a poor allocation, adding capacity may leave the assignment inefficient. If the gap is a real capacity shortage, process improvement alone may not be enough.

The three explanations can coexist. The point is not to select one by intuition. It is to state which work object the proposed change should affect and which alternative would produce a different result.

Why does a credible territory re-alignment require a two-pass review?

The first pass describes the assignment before judging the person carrying it. Write the potential, information burden, service pattern, travel, and protected selling time for each neutral territory identifier. The second pass records behaviour and outcomes over the same period. This prevents a performance result from being used to define the workload retroactively.

Piercy, Cravens, and Morgan associate territory-design satisfaction with behavioural performance, outcome performance, and organizational effectiveness in a cross-sectional UK sample (Piercy et al., 1999). That association makes satisfaction worth preserving, but it does not identify the direction of causality. A person may be satisfied because the assignment works, or the assignment may look fair because the outcome is already strong. Keep perception and outcome in separate fields.

The result is a comparison that can be challenged. If two territories have similar potential but different information and travel burdens, equal output does not prove equal work. If they have similar activity but different service obligations, equal call counts do not prove equal capacity. The comparison becomes honest when the omitted row is visible.

What explanatory burden must executive leadership meet before changing territories?

Before moving a boundary, write four sentences. The first names the work object that is expected to change. The second names the evidence that makes the current mismatch visible. The third states the smallest reversible change that could test the explanation. The fourth names the result that would stop the redraw or send the problem to another intervention.

If the proposed redraw cannot fill those sentences, it may still be a reasonable administrative choice, but it is not yet a workload diagnosis. If it can fill them, the map has become part of a decision record rather than a visual substitute for one. That is the standard a territory should meet before it is called balanced.

Boundary

The held research supports a workload architecture and several bounded applications. It does not support a universal account count, a fixed territory size, or a causal claim from satisfaction or frontier status. A good territory model is modest: it makes the work visible enough that the next decision can be challenged.

The workload question connects to the funnel bottleneck nobody measures and the compensation plan that can reward its coverage problem, where capacity and allocation are treated as operating objects rather than map labels.

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END OF ESSAY

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