



Phase 3 Module 2: Developing a Territory Plan



Business territory planning can be a complicated process—there are many factors to consider, a vast amount of data to comprehend, and strategies and tactics to develop. Though this method may seem daunting, it produces a workable plan for targeting the right customers, establishing goals for meeting and exceeding quota, and ensuring sales growth over time.

Building on the knowledge gained in The Principles of Territory Management, this module explores the specific processes used to create a clear, comprehensive, and actionable plan for maximum growth and results.

Let's get started.

OBJECTIVES AND OUTCOMES

☰ Key Objectives and Outcomes

PRE-WORK LESSONS & ASSIGNMENT: PREPARE FOR 1ST WEBINAR

☰ The Territory Overview

☰ Assignment: Territory Overview

☰ The SWOT Analysis

INTERACTIVE WEBINAR 1

☰ Live Webinar Training 1

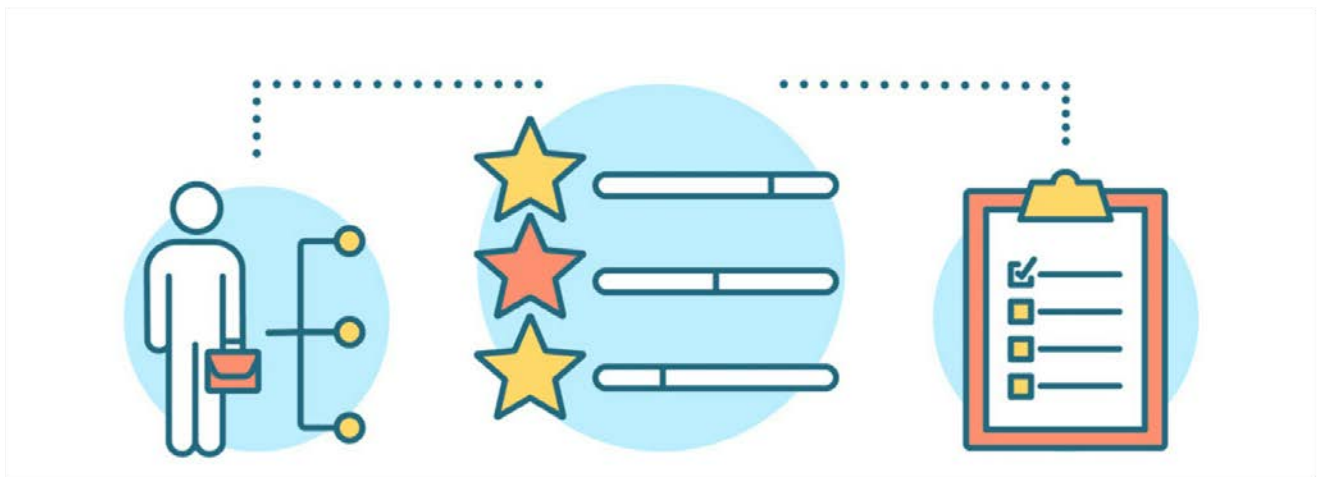
PRE-WORK ASSIGNMENT: PREPARE FOR 2ND WEBINAR

☰ Assignment: Turning SWOT into Strategies

INTERACTIVE WEBINAR 2

☰ Live Webinar Training 2

Key Objectives and Outcomes



This module blends several types of learning methods. It includes pre-work (located in this e-learning), interactive, instructor-led webinars provided via WebEx, homework, and peer reviews. Completing each of these learning opportunities guarantees your success.

During this module, you will:

1. Create a Territory SWOT Analysis using the Performance Tracker and the Customer Dashboard.

2. Use SWOT Analysis to create territory strategies.

3. Develop Tactics for Specific Accounts.

After this module, you'll:

1. Have a completed Territory Plan.

2. Have actionable steps to begin growing your Territory.

Throughout the module, you will input your data, discoveries, and insights into a PowerPoint template. By the end of the course, your Territory Business Plan should be ready to present to your peers and leaders.

Please download the template and save it to your desktop.



Zoetis Phase III Territory Plan Template.pptx

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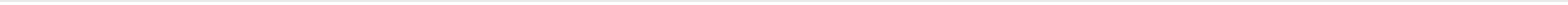


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Lesson 2 of 7

The Territory Overview

 Brown Bag





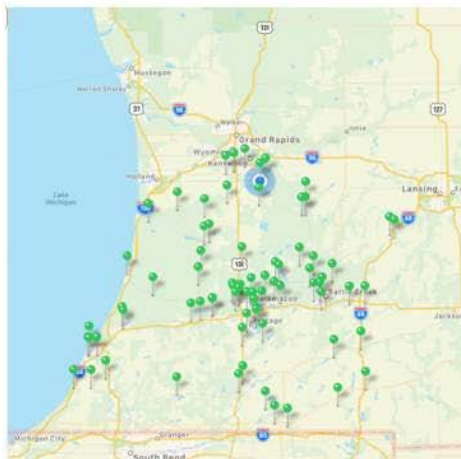
Territory Plans take data and create strategies and tactics to increase sales success.

This global analysis starts with a general overview, a 30-second commercial for your territory at the macro level. This overview summarizes your territory and provides specific data that includes the

following:

- Number of accounts
- Territory geographic area
- Types of practices
- Number of corporate accounts
- Fun facts

Take a look at the image below. It illustrates the first part of an overview for Territory 245.



Overview

Southwest Michigan

- 62 Accounts
- Mix of Corporate and Non-corporate
- Michigan State University Veterinary School Influence
 - 90% of territory Veterinarians are MSU graduates

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Example of Territory Overview

The second part of a territory overview includes a YTD summary for Focus Brands, all other brands, and the percentage above or below quota. Click on each icon to learn how to find that data for your

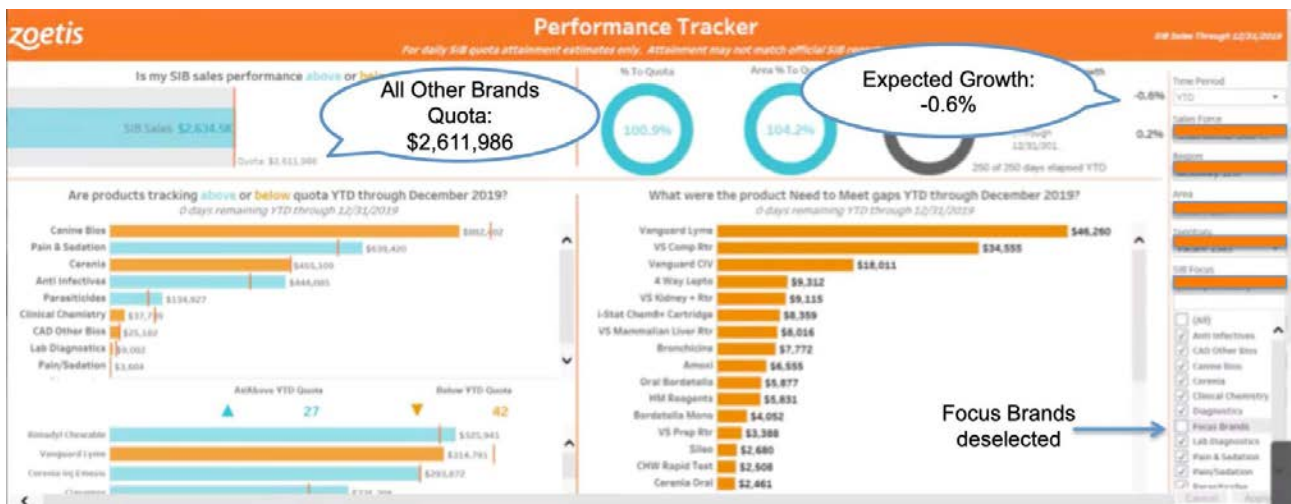
territory.

Territory Summary		
Category	Quota	Growth %
Focus Brands	\$3,498,099	17.0%
All Other Brands	\$2,611,986	-0.6%
Total	\$6,110,084	8.8%



Territory Summary		
Category	Quota	Growth %
Focus Brands	\$3,498,099	17.0%
All Other Brands	\$2,611,986	-0.6%
Total	\$6,110,084	8.8%

All Other Brands

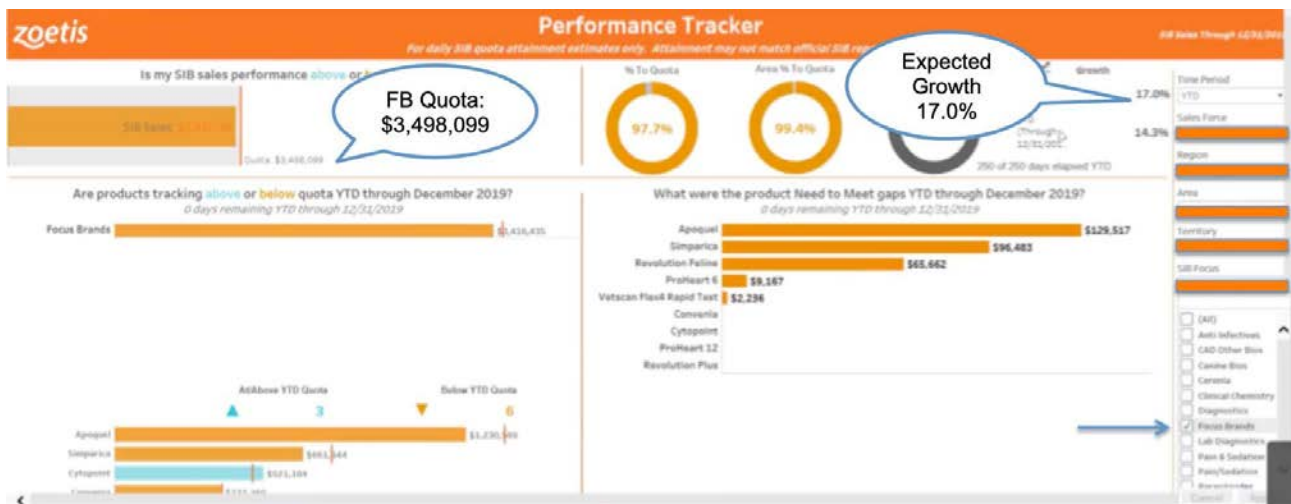


To find the quota and growth percentage for All Other Brands:

Open the Performance Tracker in Tableau and filter by non-Focus Brands, making sure Focus Brands is deselected.

Territory Summary		
Category	Quota	Growth %
Focus Brands	\$3,498,099	17.0%
All Other Brands	\$2,611,986	-0.6%
Total	\$6,110,084	8.8%

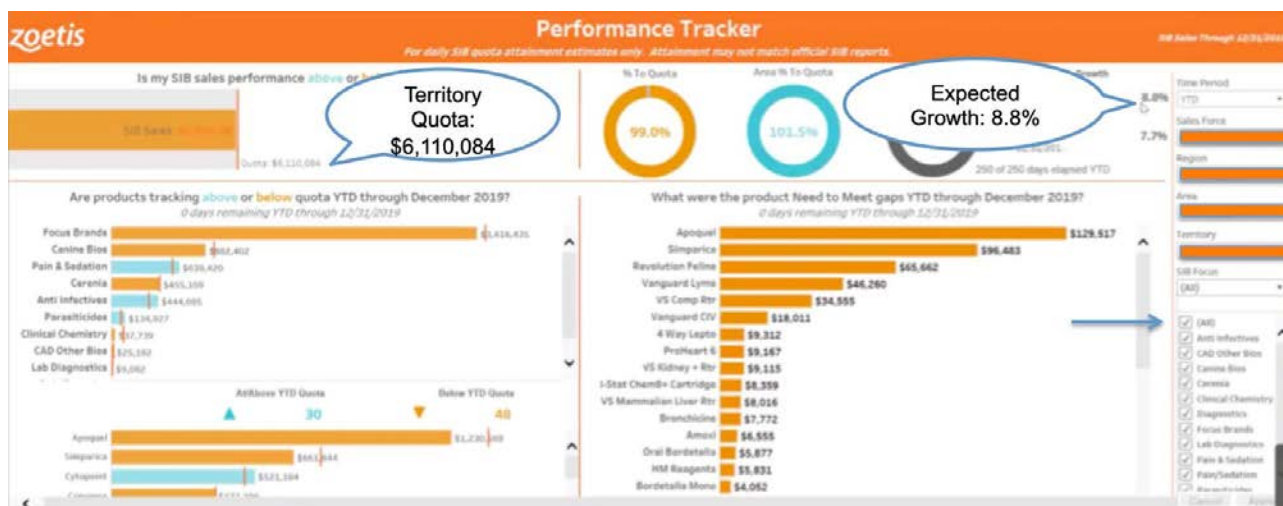
Focus Brands



To find the quota and growth percentage for Focus Brands:
Open the Performance Tracker in Tableau and filter by Focus Brands.

Territory Summary		
Category	Quota	Growth %
Focus Brands	\$3,498,099	17.0%
All Other Brands	\$2,611,986	-0.6%
Total	\$6,110,084	8.8%

Territory Quota and Growth



To find the quota for the territory and growth percentage:
Open the Performance Tracker in Tableau and filter by All Brands.

CONTINUE

Assignment: Territory Overview



Create Your Territory Overview

Review your territory and answer these questions to create your Territory Overview.

- Number of accounts
- Territory geographic area
- Types of practices
- Options available in practices
- Number of corporate accounts
- Fun facts

Using the information gathered for your territory, populate the Territory Overview slide in the Territory Business Plan PowerPoint template. Be prepared to share your slide during the first live, instructor-led training. (If you haven't downloaded the template, a copy of the template is available below.)



Zoetis Phase III Territory Plan Template.pptx

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The SWOT Analysis

 Brown Bag

Creating a SWOT analysis is the starting point for analyzing your territory.

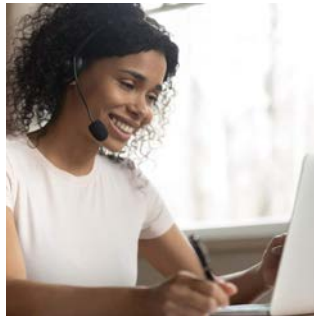
What's SWOT's super power?

A SWOT analysis is *your* secret weapon, learn it, memorize it, and you won't sweat when tough questions pop up.

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Live Webinar Training 1

BB Brown Bag

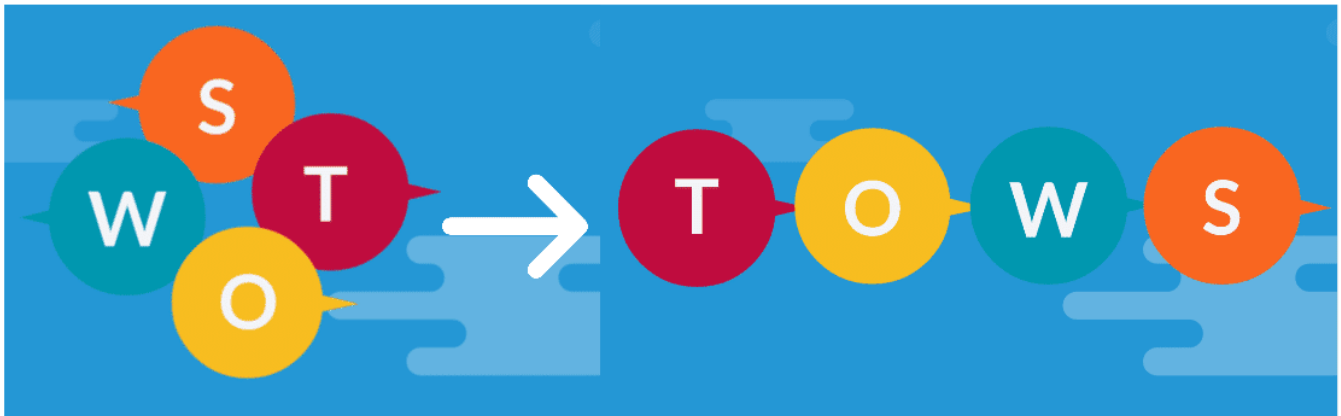


You are ready.

Congratulations! You finished the prerequisites for the first, 1-hour webinar that will utilize the work completed in this e-module.

After participating in the webinar, return to this course and complete additional work to apply the new skills and content you developed, and prepare for the second webinar.

Assignment: Turning SWOT into Strategies



SWOT and Strategies

You've completed the SWOT analysis of your territory and identified the strengths, weaknesses, opportunities and threats within it. The next step is to create strategies to overcome your challenges and take advantage of your opportunities.

Begin by asking yourself the following questions:

1. How can any of your strengths be used to maximize your opportunities?

For Example: The launch of the Simparica Trio product, that includes canine flea, tick, and heart worm protection in one pill, is an opportunity that you can maximize by targeting your accounts who are high users of Simparica or ProHeart 6/12.

2. How can any of your strengths be used to minimize your threats?

For Example: Strong performance with any of the injectable products in your portfolio, like ProHeart 6/12 or Cytopoint, can be leveraged to overcome threats of clients moving to purchasing more products outside of the veterinary practice. (ie. big box stores or online)

3. How can any of your opportunities be used to minimize your weaknesses?


For Example: A territory may have strong performance of Apoquel, but lagging with Cytopoint. Research showing client preference for injectables may be an opportunity to approach strong Apoquel accounts to incorporate Cytopoint into their protocol.

4. How can any of your opportunities be used to minimize your threats?

For Example: A major threat to our novel Dermatology brands, Apoquel and Cytopoint, is doctors only reaching for our solutions once lower cost steroids and over the counter antihistamines have failed. However, Zoetis has an opportunity to show how steroids and antihistamines may ultimately be more expensive in the long run, as they are less effective in controlling itch and prone to increased adverse events, which may increase additional pet owner costs in the long run.


Assignment: Create strategies for each therapeutic area

Fill out the therapeutic area strategy slides in the Territory Plan Template and bring to the second webinar.



Zoetis Phase III Territory Plan Template.pptx

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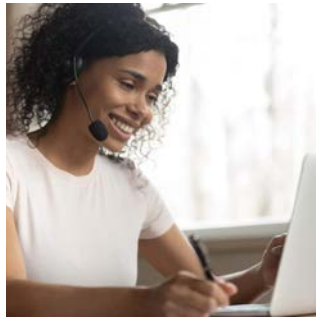


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Live Webinar Training 2

BB Brown Bag



You are ready.

Congratulations! You finished the prerequisites for the second, 1-hour webinar that will utilize the new work completed in this e-module.

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