



SOFTWARESILOS

Sales Staff Extension

PDF Manual

MODULE

staff

LAST UPDATED

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Territory Management

Sales Staff Extension · /staff/use-cases/territory-management

How companies use staff groups to organize sales teams by geographic territories.

Scenario

Company: National Distributor

Coverage: 4 regions (North, South, East, West)

Sales Team: 20 representatives

Customers: 2,000+ across all regions

Territory Structure

Staff Groups

```
├─ Territory North (5 reps)
│   ├── States: NY, NJ, PA, CT, MA
│   └── Customers: 500
├─ Territory South (6 reps)
│   ├── States: FL, GA, AL, SC, NC
│   └── Customers: 600
├─ Territory East (4 reps)
│   ├── States: VA, MD, DE, WV
│   └── Customers: 400
└─ Territory West (5 reps)
    ├── States: CA, NV, AZ, OR, WA
    └── Customers: 500
```

Commission Structure

Territory-Based Rates:

- Territory North: 6% (high cost of living)
- Territory South: 7% (growth incentive)
- Territory East: 5.5% (established market)
- Territory West: 7.5% (expansion focus)

Implementation

Step 1: Create Staff Groups

1. Staff > Staff Groups
2. Create groups:
 - Territory North
 - Territory South
 - Territory East
 - Territory West

Step 2: Assign Staff

1. Edit each staff member
2. Select appropriate territory group
3. Set commission rate
4. Save

Step 3: Assign Customers

By ZIP Code:

1. Customers > All Customers
2. Filter by ZIP code range
3. Select customers
4. Mass assign to territory staff

By State:

1. Filter by state
2. Select customers
3. Assign to territory

Benefits

Clear Ownership

Each Territory Has:

- Dedicated sales team
- Defined customer base
- Specific geographic area
- Clear responsibilities

No Overlap:

- Customers assigned to one territory
- No confusion
- Clear accountability
- Efficient coverage

Performance Tracking

By Territory:

- Total sales
- Orders placed
- Commission earned
- Customer acquisition
- Growth rate

Comparison:

- Territory vs territory
- Period vs period

- Actual vs target
- Market share

Resource Allocation

Based on Performance:

- Add reps to growing territories
- Redistribute underperforming areas
- Adjust commission rates
- Reallocate budgets

Reporting

Territory Reporting in Practice

Use staff-linked order and commission data to track territory performance.

Typical Metrics:

- Sales volume
- Number of orders
- Average order value
- Commission total
- Customer count
- Growth rate

How Teams Usually Build It:

- Staff groups define territory ownership
- Customer assignment maps customers to territory reps
- Core Magento reports are filtered/exported for territory analysis
- Optional BI tools are used for map views and advanced dashboards

Best Practices

Territory Design

Balanced:

- Similar customer counts
- Comparable sales potential
- Manageable geography
- Fair workload

Logical:

- Natural boundaries (states, regions)
- Travel efficiency
- Market characteristics
- Customer density

Territory Maintenance

Regular Review:

- Quarterly territory analysis
- Customer redistribution
- Boundary adjustments
- Performance evaluation

Flexibility:

- Adjust for growth
- Respond to changes
- Optimize coverage
- Balance workload

Next Steps

- [Field Sales Teams →](#)
- [Staff Groups →](#)
- [Reports →](#)