

PURPOSE: The purpose of this form is to help you develop and map out your territory plan and strategies that will help you achieve your goals.

INSTRUCTIONS: Input your top 5 customers and your top 5 prospects. Estimate your total ROTI (Return-on-Time-Invested) and your SOW (Share of the Wallet) for each client. Then classify your accounts with ABCD (A accounts=45% of territory profits, B accounts=25%, C accounts=20%, D accounts=10%).

TOP ACCOUNTS:

Customer Name	Last Years' Profit or Revenue	% Change	Probability	Expected Sales Volume Change	Estimated New Sales Volume	Estimate ROTI	SOW	Classification
1.								
2.								
3.								
4.								
5.								
TOTALS:								

NOTES

- ✓ SOW: Share of the Wallet: Determines the approximate % of the overall available business from the client. For example, Company XYZ Co. has an annual IT spend of \$1M, you are getting \$100K of this spend, SOW = 10%
- ✓ ROTI: Expected Gross Revenue or Profit/Total Amount of Time spent on the account. For example, Company XYZ Co. has an EGP of \$100,000, and you spend 24 hours/year on this account. Your ROTI would be $\frac{\$100,000}{24} = \4166 . Learn more about ROTI and how to calculate it with our template by logging into <https://www.cpsa.com/success-tools/templates>