ASK BHG · SALES TERRITORIES & QUOTAS

Territory Re-Alignment Trigger Matrix

Review territories on a set cadence. Change them only when a defined trigger is met.

BLUEHORIZONS

SIGNAL CATEGORY	SPECIFIC TRIGGER	THRESHOLD TO WATCH	PRIMARY LEVER	SECONDARY LEVER	CADENCE	OWNER	WHAT BREAKS IF IGNORED
Performance imbalance	**Attainment variance across territories**	Variance exceeds 20–25 points between top and bottom quartile	**Territory**	Quota	Quarterly	Sales Ops	Top reps in "easy" territories get overpaid for geography, not skill, while strong reps in weak territories quit or disengage.
	Consistent over/under attainment	Same territory misses or exceeds quota 3+ consecutive quarters	**Quota**	Territory	Quarterly	Sales Ops + Comp	Quota stops functioning as a real target. Reps either coast on an easy number or give up on an impossible one.
Market and account movement	**Account density shift**	15%+ change in addressable accounts within a territory	**Territory**	Quota	Semi-annual	Sales Ops	Reps work a map that no longer reflects where the opportunity is, so effort and reward decouple.
	M&A or customer consolidation	Any acquisition changing account ownership or HQ location	**Territory**	Comp crediting rules	Event-triggered	Sales Ops + Comp	Credit disputes explode, multiple reps claim the same revenue, and trust in the crediting system erodes fast.
	New product or vertical launch	Product doesn't map to existing territory logic	**Territory structure**	Comp plan design	Event-triggered	Product + Comp	Reps ignore the new product because it isn't comped right, or get comped inconsistently for the same sale.
Operational friction	**Credit or attribution disputes**	3+ disputes per quarter in the same territory	**Territory boundaries**	Comp crediting rules	Quarterly	Sales Ops	Reps negotiate deals with each other instead of selling, and comp starts feeling political instead of earned.
	Rep turnover concentration	Turnover exceeds company average by 1.5× in one territory	**Territory**	Comp (pay adequacy)	Quarterly	Sales Ops + HR	The organization keeps hiring into a broken territory, mistaking a design problem for a people problem.
	Sales cycle or deal size drift	20%+ change from original territory design assumptions	**Quota**	Comp accelerators	Semi-annual	Comp	Accelerators and thresholds pay out on a cycle length or deal size that no longer exists, and comp math quietly breaks.
Data and system signals	**CRM pipeline value shift**	Sustained directional shift over 2+ quarters	**Territory**	Quota	Quarterly	Sales Ops	Forecast accuracy degrades because the underlying territory assumptions are stale.
	Headcount growth without redesign	New reps added without a territory carve-out review	**Territory**	Quota	Event-triggered	Sales Ops	New reps get scraps of other people's territory, and existing reps feel punished for the company's growth.
	Disproportionate payout relative to effort	Payout-to-effort ratio is an outlier vs. peer territories	**Comp plan design**	Territory	Semi-annual	Comp	Finance questions comp spend, and the plan looks unaffordable when the real issue is territory design.
External signals	**Competitor activity shift**	Material competitive entry or exit in a region	**Territory**	Quota	Semi-annual	Sales Ops	Quotas set before the competitive shift become fantasy numbers, either too easy or unreachable.
	Macroeconomic or industry shock	Regional demand shift tied to an economic indicator	**Quota**	Comp (temporary adjustment)	Event-triggered	Comp + Finance	Reps get penalized for a downturn they can't control, driving attrition when the company needs stability most.
	Regulatory or tax change	New rule affecting geographic feasibility	**Territory**	Comp compliance	Event-triggered	Legal + Comp	The company is exposed to compliance risk, or a territory becomes legally unworkable while still being sold into.

How to use it: Set these triggers before the planning cycle so territory changes happen as a matter of policy, not negotiation. Pull the primary lever first; use the secondary lever only if the primary doesn't close the gap.

Remember: one bad quarter isn't a trigger.