Territory Performance Analysis

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Territory Performance Analysis

11.48K	40M	5M	11
Customers	Revenue (Last 5 years)	Revenue (Last year)	Total Territory

Five-Year Revenue by Business Type

4.96%
5.4%
8.8%
15.04%
61.64%

Business Type
- Retail
- Property
- Motors
- Business
- Services
- Education
- Entertainme...
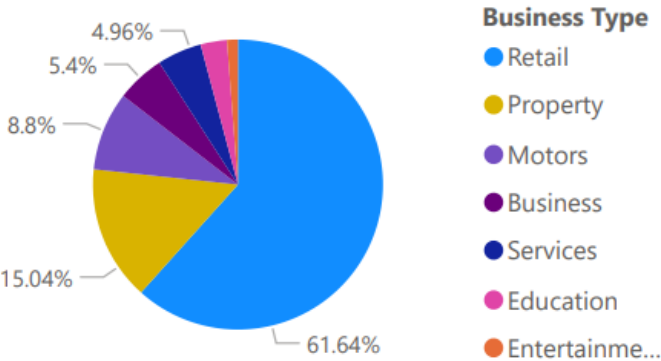
Customer Segmentation by Business Type

Total Customers (Y-axis: 0K to 8K)

Business Type: Retail, Services, Entertainments, Business, Education, Motors, Property
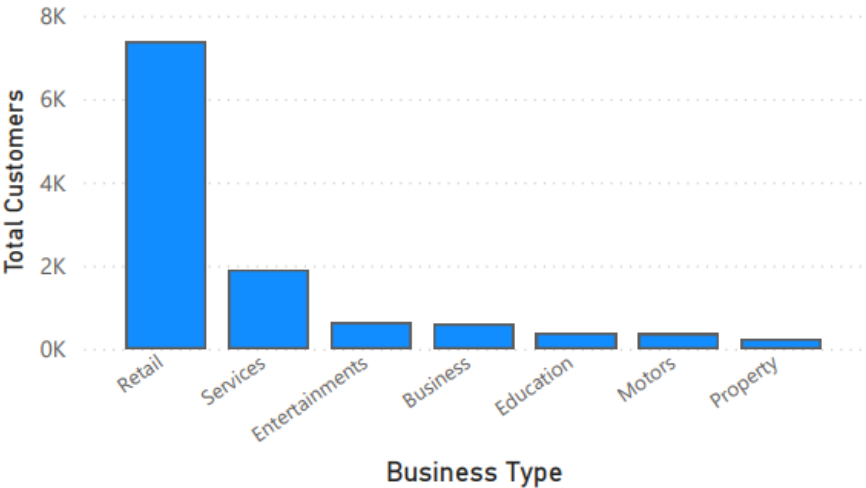
Active vs Inactive Customers by Territory

Active Customer No Yes

Total Customers (Y-axis: 0% to 100%)

Territory: Territory2, Territory4, Territory3, Territory5, Territory1, Territory7, Territory6, Territory14, Territory8, Territory9, Territory12
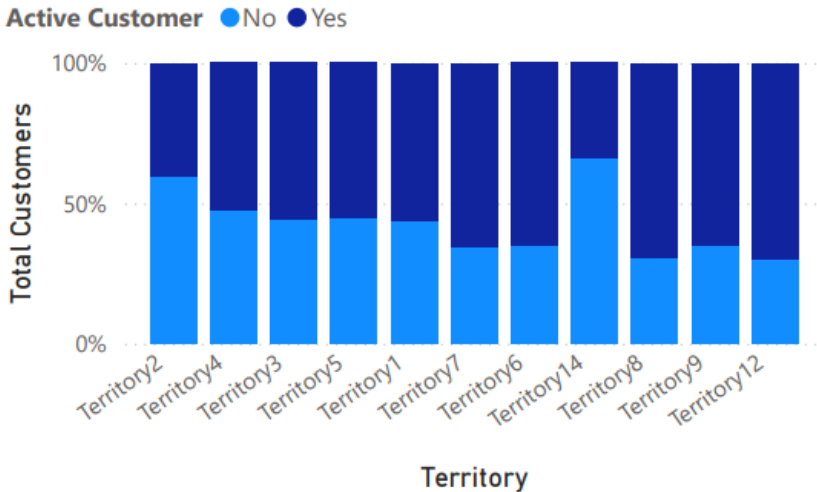
Revenue

- Total Revenue (Last 5 Years) ● Total Revenue (Last year)

Territory	Total Revenue (Last 5 Years)	Total Revenue (Last year)
Territory3	9.3M	1.1M
Territory5	6.5M	0.7M
Territory4	5.6M	0.7M
Territory7	4.2M	0.6M
Territory2	3.9M	0.6M
Territory6	3.7M	0.5M
Territory1	3.6M	0.5M
Territory8	1.5M	0.2M
Territory12	0.8M	0.1M
Territory14	0.5M	0.1M
Territory9	0.3M	0.0M
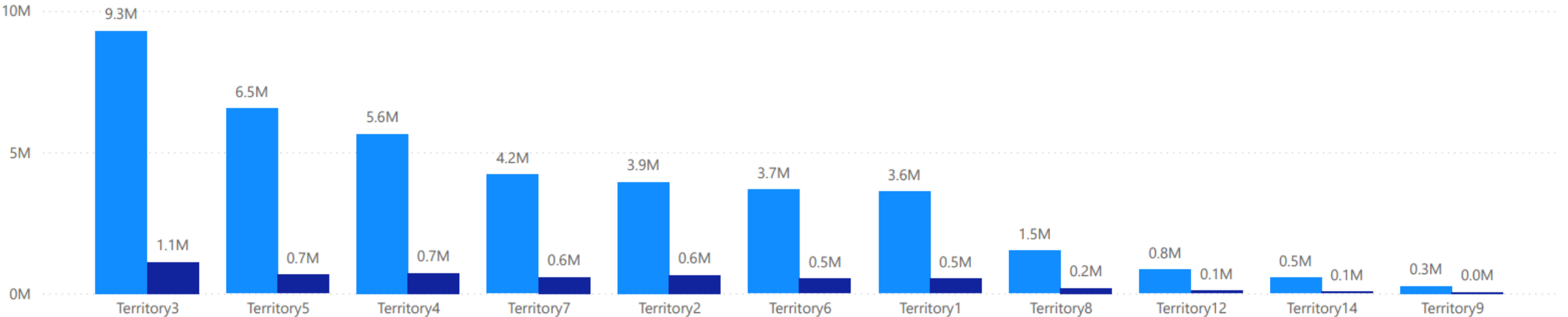
Q1. What process & criteria would you use to rank the territories in order of how efficiently they have been farmed?

What were the key metrics important in deciding the order?

Process

Data processing & validation
- Removing duplicates
- Removing outliers
- Data discrepancy in town names
- Standardising unknown values

Identifying farming KPI's

Applying MCDA
- Rank territories from most to least efficient
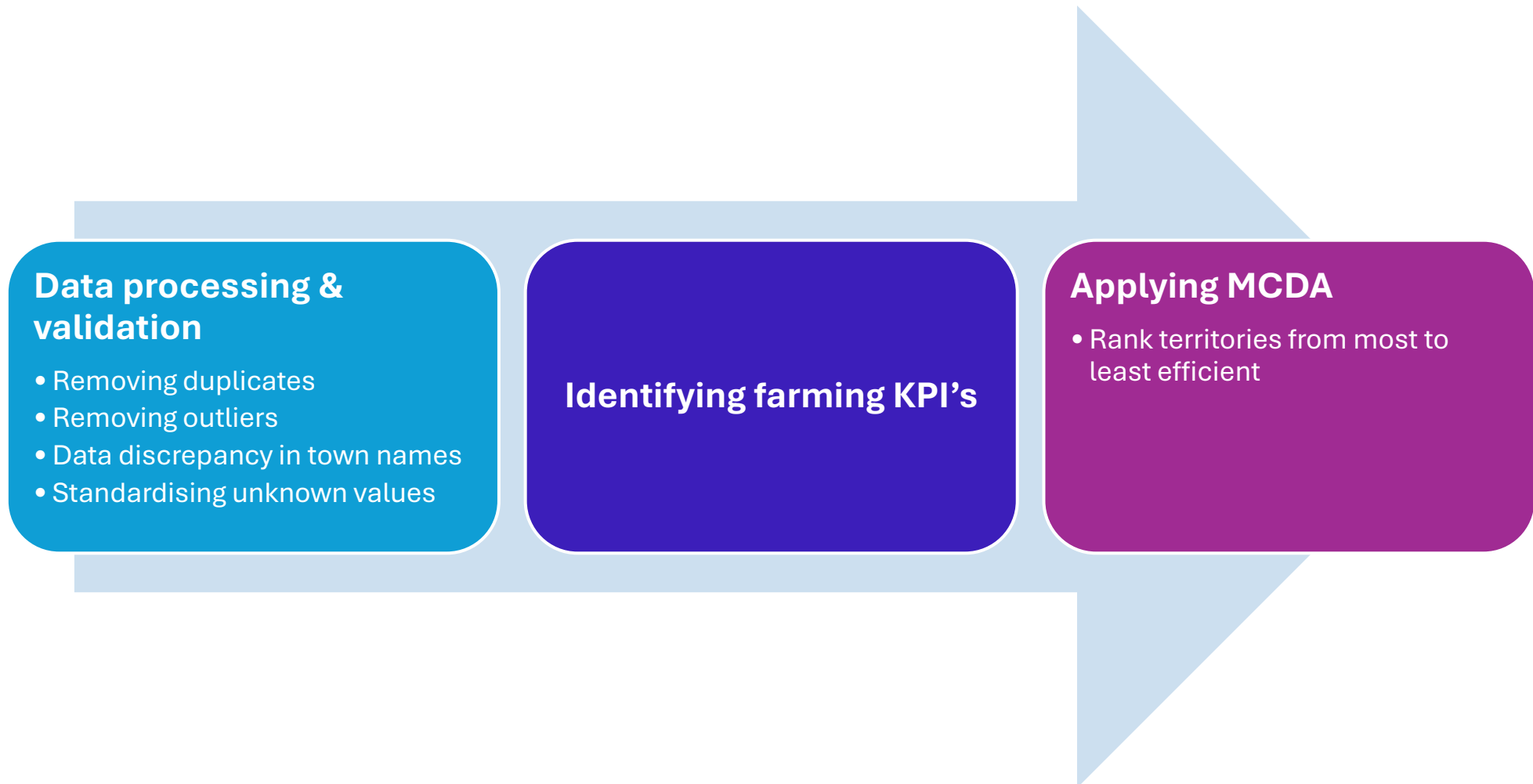
MCDA provides a balanced framework, combining multiple key metrics to rank territories fairly and consistently

- Percentage of repeated customers
- Last 5 yr & 1 yr revenue
- Bookings

Strong recurring relationship

| Define objective | → | Choose criteria | → | Weight criteria |

- Repeated customer- 35%
- 5 yr revenue - 25%
- 1 yr revenue – 10%
- Bookings by repeated customer- 30%

1- 11 *point scoring (11- highest; 1- least)*

| Score and normalise | → | Calculate total scores | → | Rank alternatives |

Order territories by their ranks

Criteria	Weightage	T1	T2	T3	T4	T5	T6	T7	T8	T9	T12	T14
Percentage of repeated customer (35%)	35%	8	4	10	9	11	5	2	3	7	6	1
Total revenue each territory (5years) (25%)	25%	5	7	11	9	10	6	8	4	1	3	2
Total revenue each territory (Last year) (10%)	10%	5	8	11	10	9	6	7	4	1	3	2
Total booking by repeated customer (30%)	30%	7	11	10	9	8	5	6	4	2	1	3

Criteria	T1	T2	T3	T4	T5	T6	T7	T8	T9	T12	T14
Percentage of repeated customer (35%)	2.8	1.4	3.5	3.15	3.85	1.75	0.7	1.05	2.45	2.1	0.35
Total revenue each territory (5years) (25%)	1.25	1.75	2.75	2.25	2.5	1.5	2	1	0.25	0.75	0.5
Total revenue each territory (Last year) (10%)	0.5	0.8	1.1	1	0.9	0.6	0.7	0.4	0.1	0.3	0.2
Total booking by repeated customer (30%)	2.1	3.3	3	2.7	2.4	1.5	1.8	1.2	0.6	0.3	0.9
Score	6.65	7.25	10.35	9.1	9.65	5.35	5.2	3.65	3.4	3.45	1.95

Rank based on criteria

	T1	T2	T3	T4	T5	T6	T7	T8	T9	T12	T14
	5	4	1	3	2	6	7	8	10	9	11

Q2. Which one or two territories do you believe have the greatest future potential. What drove you this this conclusion?

Potential Territories

Territory 2 - Top Potential

- Highest number of inactive customers: **1,291**

- Significant share in mid-to-high turnover segments: **£100k–£750k**

Territory 3

- Inactive customers: **808**

- Highly farmed

Criteria	Weightage	T2	T3	T4
Farmed efficiency (derived from Q1)	30%	1	3	2
Company estimate turnover	30%	3	1	2
Retail	10%	3	2	1
Unknown business turnover	20%	3	2	1
Property	5%	3	1	2
Motor	5%	3	3	1

Criteria	T2	T3	T4
Farmed efficiency (derived from Q1)	0.3	0.9	0.6
Company estimate turnover	0.9	0.3	0.6
Retail	0.3	0.2	0.1
Unknown business turnover	0.6	0.4	0.2
Property	0.15	0.05	0.1
Motor	0.15	0.15	0.05
Score	**2.4**	**2**	**1.65**
Rank based on criteria	**1**	**2**	**3**

Q3. Focusing on one of the territories from question 2, what would be your key recommendations to optimise this territory's performance?

What additional information would you need/want to do a thorough territory optimisation analysis?

Recommendations for Territory 2

✓ Data completeness and updating

✓ Targeted campaign

✓ Increase frequency of sales rep engagement for dormant customers

✓ Offer tailored incentives

✓ Transfer program of sales executives from high performing territories for knowledge and expertise implementation

✓ In addition to that I would also explore building a forecast model to establish future revenue and customer activity *(which requires additional data – economic indicators, competitor analysis, sales executive activity log, per customer monthly and quarterly revenue data)*