

# Master Account Assignment - Quick Reference Guide

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## Summary Statistics

### Total Account Distribution

- **Total Accounts:** 1,713
- **Phoenix Market:** 1,640 accounts (95.7%)
- **Tucson Market:** 73 accounts (4.3%)
- **Total ZIP Codes:** 156

### Phoenix 3-Area Breakdown

Area	Accounts	% of Phoenix	ZIP Codes
Phoenix East	681	41.5%	47
Phoenix Central	596	36.3%	49
Phoenix West	363	22.1%	34

### Tucson 2-Area Breakdown

Area	Accounts	% of Tucson	ZIP Codes
Tucson Area 2 - West & Central	42	57.5%	16
Tucson Area 1 - East & North	31	42.5%	10

## 📁 Deliverable Files

### 1. Master Account File

**File:** `Master_Account_Branch_Assignments.xlsx`

- **Sheet 1:** All Accounts (1,713 rows)
- **Sheet 2:** Phoenix Accounts (1,640 rows)
- **Sheet 3:** Tucson Accounts (73 rows)
- **Sheet 4:** Summary (account counts by branch)

#### Key Columns:

- `Account_ID` - Customer name/identifier
- `Street_Address`, `City`, `Zip_Code` - Full address
- `Branch_Assignment` - New branch/area assignment
- `Area` - Geographic area name

- Market - Phoenix or Tucson
- Special\_Flag - Notes for special cases

## 2. Map Visualization Data

### Phoenix Map Data

- **Files:** Phoenix\_Zip\_Code\_Map\_Data.csv and .json
- **Coverage:** 130 ZIP codes
- **Use:** Create territory maps showing Phoenix East/Central/West areas

### Tucson Map Data

- **Files:** Tucson\_Zip\_Code\_Map\_Data.csv and .json
- **Coverage:** 26 ZIP codes
- **Use:** Create territory maps showing Tucson Area 1 and Area 2

#### Data Structure:

Zip\_Code | Area | Branch\_Assignment | Active\_Accounts | Special\_Flag\_Count

## 3. Reports & Visualizations

- Master\_Account\_Assignment\_Report.md / .pdf - Comprehensive analysis report
- Master\_Account\_Assignment\_Summary.html - Interactive visualization dashboard

## Special Cases

### Tucson-Associated Accounts in Phoenix East (159 accounts)

These are accounts in peripheral areas that were operationally reassigned from Tucson to Phoenix East:

**ZIP Codes:** 85122, 85128, 85138, 85194, 85123, 85143, 85131, 85139, 85193, 85132

**Cities:** Casa Grande, Maricopa, San Tan Valley, Coolidge, Eloy, Arizona City

#### Key Points:

- Flagged with "Tucson-Associated (Phoenix East)" in Special\_Flag column
- Assigned to Phoenix East for operational efficiency
- Should be tracked separately for reporting purposes

### Previously Unassigned Accounts (23 accounts)

Accounts that lacked branch assignments in original data:

- **Phoenix:** 3 accounts in El Mirage (85335) → Assigned to West
- **Tucson:** 23 accounts in various ZIPs → Assigned based on geographic analysis

## Using Map Data for Visualization

### For Google My Maps:

1. Open Google My Maps (<https://www.google.com/maps/d/>)
2. Click "Create a new map"
3. Import the CSV file ( Phoenix\_Zip\_Code\_Map\_Data.csv or Tucson\_Zip\_Code\_Map\_Data.csv )
4. Set Zip\_Code as the location column

5. Use `Area` for color coding
6. Use `Active_Accounts` for marker size

## For Tableau/Power BI:

1. Import the CSV file as data source
2. Use built-in ZIP code geocoding
3. Create a map visualization
4. Color by `Area` field
5. Size markers by `Active_Accounts`

## Color Coding Recommendations:

### **Phoenix Areas:**

- West: Red (#FF6B6B)
- Central: Teal (#4ECDC4)
- East: Blue (#45B7D1)

### **Tucson Areas:**

- Area 1 (East & North): Mint (#95E1D3)
- Area 2 (West & Central): Pink (#F38181)

## Key ZIP Codes to Note

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### Highest Account Concentration:

1. **85122 (Casa Grande)** - 89 accounts - ! Tucson-Associated in Phoenix East
2. **85254 (Scottsdale)** - 56 accounts - Phoenix Central
3. **85308 (Glendale)** - 41 accounts - Phoenix West

### Geographic Boundaries:

**Phoenix West:** Northwest valley (Glendale, Peoria, Surprise, Goodyear, Avondale, Litchfield Park, Buckeye, El Mirage)

**Phoenix Central:** Central Phoenix, Central/North Scottsdale, Paradise Valley, Cave Creek

**Phoenix East:** Mesa, Chandler, Gilbert, Tempe, Queen Creek, Apache Junction, Gold Canyon, and peripheral areas (Casa Grande, Maricopa, San Tan Valley)

**Tucson Area 1 (East & North):** East Tucson, Foothills, Catalina

**Tucson Area 2 (West & Central):** Central Tucson, West Tucson, Marana, Oro Valley

## Next Steps Checklist

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### Immediate (Week 1-2):

- [ ] Review master assignment file
- [ ] Validate special assignments (Tucson-Associated accounts)
- [ ] Create territory maps using map visualization data
- [ ] Share assignments with field teams for feedback

### Implementation (Week 3-4):

- [ ] Import assignments to CRM system

- [ ] Update routing and scheduling systems
- [ ] Assign account managers to each area
- [ ] Communicate with customers if needed

## Ongoing:

- [ ] Monitor retention rates by branch
- [ ] Track service efficiency metrics
- [ ] Review quarterly for territory optimization
- [ ] Analyze growth patterns by ZIP code

## File Locations

All files are saved in: /home/ubuntu/

```
Master_Account_Branch_Assignments.xlsx
Phoenix_Zip_Code_Map_Data.csv
Phoenix_Zip_Code_Map_Data.json
Tucson_Zip_Code_Map_Data.csv
Tucson_Zip_Code_Map_Data.json
Master_Account_Assignment_Report.md
Master_Account_Assignment_Report.pdf
Master_Account_Assignment_Summary.html
Quick_Reference_Guide.md (this file)
```



## Tips for Using the Data

1. **Filter by Special\_Flag** to identify accounts needing special attention
2. **Sort by Active\_Accounts** in map data to prioritize high-density ZIP codes
3. **Use the Summary sheet** in Excel for quick counts and pivot tables
4. **Reference the detailed report** (PDF/MD) for methodology and context
5. **Open the HTML summary** for an interactive visual overview

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