

Master Account Assignment - Quick Reference Guide

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

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

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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