

PROMPT PACK 4

Territory Plan Builder

35 AI prompts for strategic territory management — account prioritization, pipeline building, QBR prep, manager conversations, and competitive strategy. Built for medical device sales professionals who run their territory like a business.

How to use this pack: Start every session by pasting the Train Your AI First prompt below. This configures your AI tool with your territory, quota, and manager context — so every output is relevant to your specific situation. Then run any prompt in any order based on your immediate need.

START HERE — DO THIS FIRST

Train Your AI First

Before you run any prompt in this pack, paste the following into your AI tool at the start of every new session. This configures the AI to respond like an expert in your specific field — not a generic assistant.

"You are an expert assistant for a medical device sales professional. Here is my context:

- My name is [Your Name]
- My company is [Company Name]
- My device/product is [Device Name — include what it does in one sentence]
- My territory is [geographic area or account list description]
- My target specialty is [e.g., cardiovascular surgery, point-of-care diagnostics, orthopedics]
- My top accounts are [list 3-5 account names]
- My biggest competitive threats are [competitor names]
- My current quota is [amount or % growth target]
- My fiscal year runs [month to month]
- My manager's name is [name] and their primary focus is [what they care most

about]

Use this context in every response. Write in a professional tone appropriate for internal business planning and manager-facing communication. Flag any assumptions you make so I can correct them."

Once you've pasted that, you're ready to run any prompt in this pack. The AI now knows your world.

SECTION 1 · 7 PROMPTS

Account Prioritization

Tiering, whitespace, scoring, targeting, reactivation, and coverage planning

PROMPT 01

Account Tiering Framework

THE SITUATION

You have more accounts than time. This prompt builds a tiering system so you spend your hours where they generate the most revenue.

PASTE INTO AI

"Build an account tiering framework for my territory. I want to sort my accounts into three tiers: Tier 1 (highest potential, most active investment), Tier 2 (growth opportunity, selective investment), and Tier 3 (maintenance only). For each tier, define: the criteria for inclusion, the recommended call frequency, the primary goal, and the type of activity I should be running. My territory focus is [specialty] . My top revenue drivers are [device/product lines] ."

WHAT YOU GET

A clear tiering framework with criteria and activity cadence for each level — so every account visit has a purpose.

CUSTOMIZE IT

- Add **"I currently have [X] accounts"** for context on how granular to get

- Add **"My manager expects [X calls per week]"** to align the cadence with expectations

PROMPT 02 **Whitespace Analysis**

THE SITUATION

Every territory has accounts you're not penetrating. This prompt helps you identify and prioritize the gaps.

PASTE INTO AI

"Help me conduct a whitespace analysis for my territory. Based on the following account list and current revenue by account: [paste your data or describe it] . Identify: accounts where I have no current business but should, accounts where I'm underpenetrated relative to their volume, and accounts where a competitive displacement is most likely. Rank them by opportunity size and ease of entry. For each, suggest one opening move."

WHAT YOU GET

A ranked whitespace map with a specific action for each gap account — so you know exactly where to focus next.

- Paste in your actual account list and revenue data for precise output
- Add **"My competitor currently owns [account name]"** for targeted displacement analysis

PROMPT 03 **Account Potential Scoring**

THE SITUATION

Not all accounts are equal. This prompt builds a scoring model so you can objectively rank accounts by revenue potential — not just gut feel.

PASTE INTO AI

"Build an account potential scoring model for my territory in [specialty] . Score each account on the following factors: annual procedure or test volume, current spend with my company vs. total addressable spend, number of decision makers I have relationships with, competitive