

Named Account Program Territory Simplification Proposal

Platform: Salesforce | Type: Territory Optimization | Prepared by: OpsPal by RevPal

Executive Summary

Named Account Program accounts currently display "Named Accounts Region-1/NY/TX/CA/Named" as their **Primary Region**, which fragments reporting. A sales leader asking "show me all Southeast accounts" won't see Named Account Program accounts in Florida -- they're siloed under "Named Accounts Region-1" instead.

Fix: Update the `Primary_Region__c` formula so all accounts -- including Named Account Program -- evaluate to their natural geographic region. The existing `Named_Account__c` checkbox becomes the filter for Named Account Program-specific views.

- **One formula change** -- swap 6 Named Account Program CASE entries to natural regions
 - **No changes** to territories, assignment rules, or ownership
-

How Reporting Looks Today

When a report groups by **Primary Region**, Named Account Program accounts land in their own buckets instead of alongside their geographic peers:

Primary Region	Account Count	What's Actually Here
Region Alpha	340	LE + EO accounts in CA, WA, OR, etc. -- missing 23 Named Account Program accounts
Region Beta	285	LE + EO accounts in FL, GA, TN -- missing 16 Named Account Program FL/GA accounts
Region Gamma	310	LE + EO accounts in TX, LA, etc. -- missing 14 Named Account Program TX accounts
Region Delta	275	LE + EO accounts in VA, MD, DC, etc. -- missing 13 Named Account Program accounts
Region Epsilon	220	LE + EO accounts in NY, NJ, PA, etc. -- missing 2 Named Account Program NY accounts
Region Zeta	190	LE + EO accounts in IL, MN, WI, etc. -- missing 5 Named Account Program accounts
Named Accounts Region-1	14	Named Account Program accounts only -- invisible to Southeast reporting
Named Accounts Region-3	14	Named Account Program accounts only -- invisible to South reporting
Named Accounts Region-4	18	Named Account Program accounts only -- invisible to West reporting
Named Accounts Region-2	2	Named Account Program accounts only -- invisible to Northeast reporting

Named Accounts Multi-State	~30	Named Account Program accounts scattered across states -- no geographic context
Named Accounts	~23	Named Account Program accounts scattered across states -- no geographic context

The problem: 105 Named Account Program accounts are isolated from their geographic peers. You can't answer "how many accounts do we have in the Southeast?" without manually adding "Named Accounts Region-1" into the mix.

Example: 8 Named Account Program Accounts in Reports Today

Account	State	Segment	Primary Region (Today)
Metro Fire Department A	CA	Local Emergency Operations	Named Accounts Region-4
County Government B	FL	Local Government	Named Accounts Region-1
City Fire Department C	TX	Local Emergency Operations	Named Accounts Region-3
Metro Emergency Agency D	NY	Local Emergency Operations	Named Accounts Region-2
County Government E	VA	Local Government	Named Accounts Multi-State
County Government F	IL	Local Government	Named Accounts Multi-State
County Government G	MD	Local Government	Named Accounts Multi-State
City Fire Department H	ID	Local Emergency Operations	Named Accounts Multi-State

None of these appear in a "Region Beta" or "Region Alpha" or "Region Delta" report today.

How Reporting Looks After the Change

The same report grouped by **Primary Region** now includes Named Account Program accounts in their natural geography:

Primary Region	Account Count	What Changes
Region Alpha	363	+23 Named Account Program accounts (CA, ID, WA) now included
Region Beta	301	+16 Named Account Program accounts (FL, GA) now included
Region Gamma	324	+14 Named Account Program accounts (TX, LA) now included
Region Delta	288	+13 Named Account Program accounts (VA, MD, DC) now included
Region Epsilon	222	+2 Named Account Program accounts (NY) now included
Region Zeta	195	+5 Named Account Program accounts (IL, MO, KY) now included

No more "Named Accounts" region buckets. Every account has a geographic region.

Same 8 Accounts After the Change

Account	State	Segment	Primary Region (After)
Metro Fire Department A	CA	Local Emergency Operations	Region Alpha
County Government B	FL	Local Government	Region Beta
City Fire Department C	TX	Local Emergency Operations	Region Gamma
Metro Emergency Agency D	NY	Local Emergency Operations	Region Epsilon
County Government E	VA	Local Government	Region Delta
County Government F	IL	Local Government	Region Zeta
County Government G	MD	Local Government	Region Delta
City Fire Department H	ID	Local Emergency Operations	Region Alpha

Filtering for Named Account Program-Specific Views

Named Account Program visibility doesn't go away -- it shifts from region-based isolation to a simple filter:

I want to see...	Filter
All accounts in the Southeast (including Named Account Program)	Primary Region = "Region Beta"
Only Named Account Program accounts	Named Account = TRUE
Named Account Program accounts by region	Named Account = TRUE, group by Primary Region
Which LE region does an Named Account Program account align with?	Look at Primary Region on the Account record
Named Account Program vs. non-Named Account Program comparison within a region	Primary Region = "Region Beta", group by Named Account

Two-Tier Named Account Program Model

Both tiers show **natural geography** as Primary Region:

Enlisted -- Rep-034's Named Account Program team directly owns these accounts.

- Primary Territory: Named Account Program territory (unchanged, e.g., "Named Accounts Region-1")
- Primary Region: Natural geography (e.g., "Region Beta")
- FY26 Named Account Program: TRUE

Supported -- Accounts stay in LE/EO territory, flagged for Named Account Program engagement.

- Primary Territory: Normal LE/EO territory (e.g., "Zone C-1")
- Primary Region: Natural geography (e.g., "Region Beta")
- FY26 Named Account Program: TRUE

The Named Account Program territory hierarchy remains unchanged. Only the region classification is updated.

What Changes in Salesforce

Primary_Region__c Formula (Only Change)

Simple swaps (4 entries):

Current	New
"Named Accounts Region-1", "Named Accounts Region-1"	"Named Accounts Region-1", "Region Beta"
"Named Accounts Region-2", "Named Accounts Region-2"	"Named Accounts Region-2", "Region Epsilon"
"Named Accounts Region-3", "Named Accounts Region-3"	"Named Accounts Region-3", "Region Gamma"
"Named Accounts Region-4", "Named Accounts Region-4"	"Named Accounts Region-4", "Region Alpha"

BillingState lookups (2 entries): The generic "Named Accounts" and "Named Accounts Multi-State" territories contain accounts from multiple states, requiring a nested BillingState CASE. See Appendix for full formula.

Formula size: ~3,800 chars total (under 5,000 limit).

What Does NOT Change

- `Named_Account__c` field (already deployed, 105 accounts flagged)
- Named Account Program territory structure (6 territories remain)
- Named Account Program assignment rules and account ownership
- `Territory_Segment__c` formula

Implementation Steps

#	Action	Est.
1	RevOps approves approach	--
2	Backfill BillingState on 10 null-value accounts	30 min
3	Deploy updated <code>Primary_Region__c</code> formula	30 min
4	Validate via SOQL spot-check	15 min
5	Update any saved report filters using "Named Accounts" as region	30 min

Total: ~2 hours (excluding approval wait)

Risks & Prerequisites

Risk	Mitigation
10 Named Account Program accounts have blank BillingState	Backfill before deploy (see table below)
Existing reports filter on "Named Accounts" region	Identify and update saved filters post-deploy
Two Named Account Program fields exist (<code>Named_Account_Flag__c</code> vs <code>Named_Account__c</code>)	Confirm authoritative field with stakeholder
2 Canada accounts (Ontario) lack US state mapping	Confirm mapping -- "Region Zeta" per existing Canada territory logic?

BillingState Backfill Required (10 Accounts)

Account	Inferred State
County 911 District I	Texas
City Emergency Center J	Virginia
City Fire Department K	Texas
City Emergency Agency L	Texas
County Emergency Agency M	Texas
Metro Fire Department N	Illinois
County Emergency Agency O	Florida
County Emergency Agency P	Kentucky
County Emergency Services Q	California
County Public Safety Agency R	Virginia

What We Need From You

Item	Priority
Approve this approach	Required
Confirm enlisted vs. supported account lists - - which accounts does Rep-034's team directly own?	Required
Confirm authoritative Named Account Program field -- <code>Named_Account__c</code> or <code>Named_Account_Flag__c</code> ?	Required
Approve BillingState backfill on the 10 null accounts above	Required
Canada mapping -- should Toronto accounts map to "Region Zeta"?	Before deploy



Appendix: Proposed Formula (Replacement for Lines 57-62)

```
"Named Accounts Region-1", "Region Beta",  
"Named Accounts Region-2", "Region Epsilon",  
"Named Accounts Region-3", "Region Gamma",  
"Named Accounts Region-4", "Region Alpha",  
"Named Accounts", CASE(BillingState,  
  "California", "Region Alpha", "Washington", "Region Alpha", "Oregon",  
"Region Alpha",  
  "Arizona", "Region Alpha", "Nevada", "Region Alpha", "Idaho", "Region A  
lpha",  
  "Alaska", "Region Alpha", "Hawaii", "Region Alpha", "Utah", "Region A  
lpha",  
  "Colorado", "Region Alpha", "Montana", "Region Alpha", "Wyoming", "Re  
gion Alpha",  
  "Texas", "Region Gamma", "New Mexico", "Region Gamma", "Oklahoma", "R  
egion Gamma",  
  "Kansas", "Region Gamma", "Missouri", "Region Gamma", "Arkansas", "Re  
gion Gamma",  
  "Louisiana", "Region Gamma", "Mississippi", "Region Gamma", "Alabam  
a", "Region Gamma",  
  "Florida", "Region Beta", "Georgia", "Region Beta",  
  "Tennessee", "Region Beta",  
  "Minnesota", "Region Zeta", "Wisconsin", "Region Zeta",  
  "Illinois", "Region Zeta", "Nebraska", "Region Zeta",  
  "North Dakota", "Region Zeta", "South Dakota", "Region Zeta",  
  "Virginia", "Region Delta", "Maryland", "Region Delta",  
  "District of Columbia", "Region Delta",  
  "North Carolina", "Region Delta", "South Carolina", "Region Delta",  
  "Ohio", "Region Delta", "Kentucky", "Region Delta",  
  "West Virginia", "Region Delta", "Michigan", "Region Delta",  
  "Indiana", "Region Delta",  
  "New York", "Region Epsilon", "New Jersey", "Region Epsilon",  
  "Pennsylvania", "Region Epsilon", "Connecticut", "Region Epsilon",  
  "Massachusetts", "Region Epsilon", "Maine", "Region Epsilon",  
  "Vermont", "Region Epsilon", "New Hampshire", "Region Epsilon",  
  "Rhode Island", "Region Epsilon", "Delaware", "Region Epsilon",  
  "Iowa", "Region Gamma",  
  "Unassigned"),  
"Named Accounts Multi-State", CASE(BillingState,  
  "California", "Region Alpha", "Idaho", "Region Alpha", "Washington",  
"Region Alpha",  
  "Virginia", "Region Delta", "Maryland", "Region Delta",  
  "District of Columbia", "Region Delta",  
  "New York", "Region Epsilon", "New Jersey", "Region Epsilon",
```

```
"Pennsylvania", "Region Epsilon",  
"Texas", "Region Gamma", "Missouri", "Region Gamma",  
"Florida", "Region Beta", "Louisiana", "Region Beta",  
"Georgia", "Region Beta",  
"Illinois", "Region Zeta", "Kentucky", "Region Delta",  
"Unassigned"),
```

Prepared by RevPal. Implementation begins upon stakeholder approval.