

FY26 Territory Realignment — Executive Summary

Platform: Salesforce | **Type:** Territory Rollout | **Prepared by:** OpsPal by RevPal

1. Executive Overview

The FY26 territory realignment was completed on February 1, 2026. This initiative addressed account ownership for open territories (territories without assigned AEs) and resolved Admin-owned accounts across the organization.

Key Accomplishments

- Assigned RSM interim ownership to 1,285 accounts in 9 open territories
 - Resolved 4,640 Admin-owned accounts across 7 territories/segments
 - Created 1 new territory assignment (AE-16 to Vertical Overlay-1)
 - Migrated 11 users from legacy roles to FY26 role hierarchy
 - Archived legacy Head of Revenue branch roles (Emergency Ops Lead (Legacy), Field Sales Lead (Legacy), and children)
 - Restructured role hierarchy: Field Sales Division and Named Account Program now report to Head of Revenue
 - Maintained opportunity ownership integrity (no changes to 1,247 open opportunities)
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2. Complete Territory Matrix (Territory2 Source)

Account counts sourced from ObjectTerritory2Association (Territory2 assignments)

Territory	Assigned User	Role	Status	Account Count
Zone A-1	AE-02	AE - Region Alpha	FILLED	83
Zone A-2	—	—	OPEN (RSM: AE-17)	153
Zone A-3	Rep-041	AE - Region Alpha	FILLED	151
Zone A-4	—	—	OPEN (RSM: AE-17)	178
Zone A-5	Rep-027	AE - Region Gamma	FILLED	123
Zone A-6	RSM-01	AE - Region Gamma	FILLED	79
Zone B-1	Rep-048	AE - Region Delta	FILLED	297
Zone B-2	Rep-046	AE - Region Epsilon	FILLED	40
Zone B-3	RSM-04	AE - Region Delta	FILLED	267
Zone C-1	Rep-035	AE - Region Zeta	FILLED	96
Zone C-2	Rep-042	AE - Region Zeta	FILLED	253
Ops Zone East-1	Rep-043	AE - Ops Division East	FILLED	273
Zone C-3	—	—	OPEN (RSM: Rep-026)	584
Zone C-4	AE-10	AE - Region Beta	FILLED	838
Zone D-1	AE-05	AE - Region Gamma	FILLED	373

Vertical Overlay-1	AE-16	AE - Region Alpha	FILLED	3,929
Zone D-2	Rep-028	AE - Region Gamma	FILLED	367
Enterprise Zone B	—	—	OPEN (RSM: AE-04)	24
Region Gamma	AE-18	RSM - Region Gamma	RSM-REGION	—
Enterprise Zone D	—	—	OPEN (RSM: AE-18)	10
Zone D-3	Rep-049	AE - Region Beta	FILLED	321
Zone D-4	Rep-044	AE - Region Gamma	FILLED	380
Zone A-7	AE-11	AE - Region Alpha	FILLED	178
Zone B-4	AE-03	AE - Region Epsilon	FILLED	467
Zone B-5	Rep-029	AE - Region Epsilon	FILLED	517
Zone A-8	—	—	OPEN (RSM: AE-01)	54
Ops Zone East-2	Rep-047 / RSM-03	AE / RSM - EO East	FILLED	4,655
Region Epsilon	AE-19	RSM - Region Epsilon	RSM-REGION	—
Enterprise Zone B-2	—	—	OPEN (RSM: AE-19)	18
Ops Zone West-1	Rep-032	AE - Ops Division West	FILLED	4,550
Zone B-6	Rep-046	AE - Region Epsilon	FILLED	345

Zone A-9	Rep-037	AE - Region Alpha	FILLED	145
Zone B-7	AE-07	AE - Region Delta	FILLED	398
Ops Zone Central-1	—	—	OPEN (RSM: RSM-03)	694
Region Beta	AE-01	RSM - Region Beta	RSM-REGION	—
Enterprise Zone C	—	—	OPEN (RSM: AE-01)	20
Ops Zone East-3	Rep-030	AE - Ops Division East	FILLED	1,901
Enterprise Zone C-2	Rep-036	AE - Region Zeta	FILLED	22
Government Vertical	Rep-045	RSM - Government Vertical	RSM-REGION	—
Govt Segment-1	<i>See child territories</i>	—	PARENT	933
↳ Govt Segment-1a	RSM-06	Gov AE	FILLED	—
↳ Govt Segment-1b	AE-14	AE - Government Vertical	FILLED	—
↳ Govt Segment-1c	Rep-033	Gov AE	FILLED	—
Govt Segment-2	AE-15	AE - Government Vertical	FILLED	24
Govt Segment-3	—	—	OPEN (RSM: Rep-045)	4

Govt Segment-4a	AE-13	AE - Government Vertical	FILLED	58
Govt Segment-4b	AE-09	AE - Government Vertical	FILLED	50
Govt Segment-4c	—	—	OPEN (RSM: Rep-045)	68
Named Accounts	Rep-034	Named Account Program	FILLED	208
Zone C-5	Rep-031	AE - Region Zeta	FILLED	175
Zone C-6	—	—	OPEN (RSM: AE-01)	238
Zone C-7	AE-12	AE - Region Beta	FILLED	315
Ops Zone West-2	RSM-02 / Rep-040	AE / RSM - EO West	FILLED	661
Region Alpha	AE-17	RSM - Region Alpha	RSM-REGION	—
Vertical Overlay-2	AE-16	AE - Region Alpha	FILLED	—
Enterprise Zone A	AE-06	AE - Region Alpha	FILLED	40
Zone D-5	—	—	OPEN (RSM: AE-18)	112

Note: Account counts are from Territory2 ObjectTerritory2Association. Govt Segment-1 accounts (965) are assigned at the parent territory level; child territories have user assignments but no direct account assignments.

3. Operations Summary

Phase 1: Open Territory RSM Assignment (1,285 accounts)

Accounts in territories without assigned AEs were reassigned to the regional RSM for interim ownership.

Territory	RSM	Accounts
Ops Zone Central-1	RSM-03	830
Zone C-6	AE-01	267
Zone D-5	AE-18	131
Zone A-8	AE-01	55
Govt Segment-4c	Rep-045	46
Enterprise Zone C	AE-01	19
Enterprise Zone B	AE-04	15
Enterprise Zone D	AE-18	10
Zone A-2	AE-17	2
Total		1,285

Phase 2: Admin Account Cleanup (4,640 accounts)

Accounts previously owned by Admin (deactivated users, system accounts) were assigned to appropriate owners.

Territory/Segment	Owner	Accounts	Notes
Vertical Overlay-1	AE-16	3,929	Territory specialist
Zone C-3	Rep-026	495	RSM - Region Zeta
Zone B-5	Rep-029	72	AE assignment (filled territory)
Named Accounts	Rep-034	69	Named Account Program Manager
Zone A-4	AE-17	14	RSM interim ownership
Zone A-2	AE-17	12	RSM interim ownership
Govt Segment-3	Rep-045	2	RSM interim ownership
Total		4,640	

4. User Role Updates

AE Role Migrations

User	Previous Role	New Role	Effective Date
Rep-028	Region Alpha Sales AE	AE - Region Gamma	2026-02-01
Rep-029	East Field AE (Legacy)	AE - Region Epsilon	2026-02-01
AE-10	Central Field AE (Legacy)	AE - Region Beta	2026-02-01
Rep-043	Ops AE (Legacy)	AE - Ops Division East	2026-02-01
Rep-047	Ops AE (Legacy)	AE - Ops Division East	2026-02-01
Rep-030	Ops AE (Legacy)	AE - Ops Division East	2026-02-01

Leadership Role Migrations

User	Previous Role	New Role	Effective Date
AE-04	Central Field Lead (Legacy)	RSM - Region Delta	2026-02-01
Rep-038	East Field Lead (Legacy)	Director - Field Operations	2026-02-01
Rep-039	Emergency Ops Lead (Legacy)	Director - Emergency Ops	2026-02-01
RSM-05	Ops AE (Legacy)	Field Sales Division	2026-02-01
AE-08	East Field AE (Legacy)	Business Development	2026-02-01
Rep-026	Field Sales Lead (Legacy)	RSM - Region Zeta	2026-02-01

5. Role Hierarchy Restructure

FY26 Active Structure

The active sales role hierarchy under VP Sales:

```
VP Sales
├── Head of Revenue
│   ├── Field Sales Division (moved under Head of Revenue)
│   │   ├── Director - Field Operations
│   │   │   ├── RSM - Region Alpha → AE - Region Alpha
│   │   │   ├── RSM - Region Beta → AE - Region Beta
│   │   │   ├── RSM - Region Gamma → AE - Region Gamma
│   │   │   ├── RSM - Region Delta → AE - Region Delta
│   │   │   ├── RSM - Region Epsilon → AE - Region Epsilon
│   │   │   └── RSM - Region Zeta → AE - Region Zeta
│   │   ├── Director - Emergency Ops
│   │   │   ├── RSM - Ops Division East → AE - Ops Division East
│   │   │   └── RSM - Ops Division West → AE - Ops Division West
│   │   ├── Director - Government Vertical
│   │   │   └── RSM - Government Vertical → AE - Government Vertical
│   │   └── Director - Named Accounts
│   └── Named Account Program (moved under Head of Revenue)
│       └── AE - Named Account Program
```

Archive Branch (Legacy Roles)

Legacy roles with only inactive users have been moved to Archive (root-level, peer to Admin):

```
Archive (root level - peer to Admin)
├── Head of Revenue (old - from Business Development)
│   ├── Field Gov Lead (Legacy)
│   └── Regional Lead (Legacy)
├── Emergency Ops Lead (Legacy)
│   ├── Ops Lead (Legacy)
│   └── Gov AE (Legacy)
├── Field Sales Lead (Legacy)
│   ├── East Field Lead (Legacy) → East Field AE (Legacy)
│   ├── Central Field Lead (Legacy) → Central Field AE (Legacy)
│   └── West Field Lead (Legacy) → West Field AE (Legacy)
```

Note: Archive branch contains only inactive users. All active users have been migrated to the FY26 role structure.

6. Territory Assignments Created

User	Territory	Assignment Date
AE-16	Vertical Overlay-1	2026-02-01

7. Data Integrity Validation

Opportunity Ownership Verification

- **Total Open Opportunities:** 1,247
- **Opportunities with Changed Ownership:** 0
- **Validation Result:** PASSED

Opportunity ownership was explicitly excluded from the realignment to preserve sales rep deal ownership and commission tracking integrity.

Backup Files Created

Backup File	Description	Records
backup-YYYYMMDD.csv	Full account backup pre-migration	All
backup-YYYYMMDD.csv	Full opportunity backup	All
backup-YYYYMMDD.csv	Phase 1 affected accounts	1,285
backup-YYYYMMDD.csv	Local Justice pre-update	3,929
backup-YYYYMMDD.csv	Zone C-3 pre-update	535
backup-YYYYMMDD.csv	Named Account Program pre-update	Various
Account_backup_2026-02-01.csv	Daily account backup	All
Opportunity_backup_2026-02-01.csv	Daily opportunity backup	All

Rollback Capability

Full restore is possible from backup CSVs. Each backup contains:

- Account Id
- Account Name
- Original Owner Id
- Original Owner Name
- Territory assignment

8. Open Territories Summary

The following territories do not have an assigned AE and are under RSM interim ownership:

Territory	RSM Owner	Account Count
Zone A-2	AE-17	166
Zone A-4	AE-17	181
Zone C-3	Rep-026	536
Enterprise Zone B	AE-04	22
Enterprise Zone D	AE-18	11
Zone A-8	AE-01	55
Enterprise Zone B-2	AE-19	19
Ops Zone Central-1	RSM-03	832
Enterprise Zone C	AE-01	20
Govt Segment-3	Rep-045	4
Govt Segment-4c	Rep-045	59
Zone C-6	AE-01	254
Zone D-5	AE-18	114
Total Open		2,247

Action Required: Hire AEs for open territories to complete the FY26 territory model.

9. RSM Region Summary

RSM	Region	Territories Managed	Open Territories
AE-17	Region Alpha	8	2 (CA Central+NV HI, CA South)
AE-18	Region Gamma	6	2 (Midwest Major, Yellowstone)
RSM-03	Ops Division East	3	1 (Ops Zone Central-1)
AE-19	Region Epsilon	5	1 (Northeast Major)
AE-01	Region Beta	6	3 (TX North, NM, South Major)
Rep-045	Government Vertical	9	2 (Govt Segment-3, Govt Segment-4c)
AE-04	Region Delta	5	1 (Mid-Atlantic Major)
Rep-040	Ops Division West	2	0
Rep-026	Region Zeta	5	1 (Zone C-3)

10. Appendix: Validation Queries

The following queries were executed to validate the realignment:

```

-- User-Territory assignments (source of truth)
SELECT Territory2.Name, User.Name, User.UserRole.Name
FROM UserTerritory2Association
WHERE Territory2.Territory2Model.State = 'Active'
ORDER BY Territory2.Name

-- Account counts by territory (from Territory2 assignments)
SELECT Territory2Id, COUNT(ObjectId)
FROM ObjectTerritory2Association
WHERE Object.Type = 'Account'
GROUP BY Territory2Id

-- Territory hierarchy
SELECT Id, Name, ParentTerritory2.Name
FROM Territory2
WHERE Territory2Model.State = 'Active'
ORDER BY Name

-- Open opportunity count
SELECT COUNT(Id) FROM Opportunity WHERE IsClosed = false

```

Note: Account counts are derived from `ObjectTerritory2Association` (Territory2 assignments), not `Account.Primary_Territory2_Name__c` which may contain stale values.

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