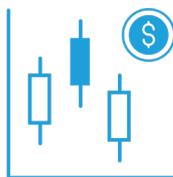# Global Life Insurance Provider Modernizes Territory Alignment Across Distribution Channels

Reduced territory overlap and whitespace by 30%

Enabled continuous territory updates without sales disruption

Improved visibility into territory performance across channels

SITUATION

A global life insurance provider supported multiple distribution models, including captive agents, independent advisors, and partner channels. Territories were defined by geography, customer segments, and product focus, and required frequent adjustment as markets evolved.

Territory design had historically been static, with updates occurring infrequently due to the complexity of change.

CHALLENGE

Manual territory management made it difficult to respond quickly to shifts in demand or organizational structure. Realignments required significant effort and risked misalignment with quotas and incentives. Sales leaders lacked a clear view of coverage effectiveness across channels.

SITUATION

The company introduced a governed, no-code territory management capability that unified design, execution, and analysis. Territories could be modeled and adjusted using business rules, with full visibility into downstream impacts.

Changes were deployed incrementally and synchronized automatically, ensuring consistency across systems.

OUTCOMES

Territory management became a continuous, adaptive process rather than a disruptive event. Coverage improved, alignment with quotas and incentives was maintained, and leadership gained real-time insight into territory effectiveness across a complex distribution landscape.

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