



DEBORAH L BROWN

Sales Effectiveness Expert



Successful Time Management for Sales Professionals



- Slideshare Edition -

Welcome



- Your Presenter:
 - Deb Brown
 - Practice focus:
 - Sales coaching
 - Sales training
 - Clients include:
 - Small businesses
 - Growing companies
 - Fortune 500



Our Services



- Training and coaching for sales professionals and sales teams.
- Rooted in our 4-step methodology.
- Proven results for business owners and sales teams from small companies to the Fortune 500.



Our Services



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Our Services



- Applied leadership and sales approach.
- Sell in a way that aligns with your values.
- Dynamic and holistic approach based on the example of Jesus of Nazareth.
- Sales training & coaching integrated with leadership development.



Our Services



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Today's Agenda

- What is time management?
- Why is time management so critical for sales professionals?
- What should salespeople do to gain control of their time?
- Key steps to time management success
- Questions and answers
- Key takeaways



What is Time Management?



What is Time Management?

- Time management is:
 - Using strategies to plan and control how your time is used.
 - Awareness of “where the time goes” and how to impact that.
 - Being proactive about your use of time so that it serves you, rather than you serving it.



What is Time Management?

- Keys to time management:
 - Observing how you use time presently.
 - Determining how your time should be optimally used.
 - Identifying the primary causes of the gap between your current use of time and what would be optimal.
 - Planning to control or minimize the causes of the gap, and working to close it.
 - Tracking and monitoring progress.



Why is Time Management So Critical in Sales?



Time Management in Sales

- The role of time in sales:
 - Time is how your effectiveness is tracked (quota is based on time).
 - You need time in order to do your job (sales calls, closing meetings).
 - Prospects and their circumstances complicate your relationship to time.
 - Time is essential to the core of your job.
 - “You’re only as good as your next deal.”



Time Management in Sales

- What you need time for:
 - Planning (how should I sell?)
 - Targeting (what opportunities should I pursue?)
 - Responding to leads
 - Sales calls (phone/outbound)
 - Sales calls (in person)
 - Follow-up with prospects
 - Internal coordination (checking product availability, preparing proposals)
 - Relationship development



Time Management in Sales

- Time is vital for your success:
 - Achieving quota is all about consistency every month.
 - Exceeding quota last month does not allow you to “take a breather” this month.
 - How you spend one month closing deals can lead you to spend the next month playing catch-up on new leads or mid-stream opportunities.



How to Gain Control of Your Sales Time



Gaining Control of Sales Time

- Take control of your time:
 - Log and track how you currently spend time.
 - Use online tools or a traditional log book.
 - Look for patterns between time you spend as intended, and time lost to other issues.
 - What are the key distractions and challenges?



Gaining Control of Sales Time

- Common sales time distractions:
 - Internal meetings
 - Helping other sales reps
 - Responding to under-qualified inquiries
 - Supporting or advocating for existing customers
 - Manual reporting requirements
 - “Can you take care of this for me?” requests
 - Travel to in-person sales calls
 - Reviewing/responding to emails



Gaining Control of Sales Time

- Responding to repeat distractions:
 - Set aside dedicated time for certain of these activities.
 - For example, block out a given timeframe (1 hour in the morning, 1 hour in the afternoon) to respond to emails.
 - For activities that are not only distractions but issues others should be handling:
 - Define guidelines for addressing them
 - Move them quickly to other teams
 - Escalate up to sales management



Key Steps to Time Management Success



Steps to Time Success

- **Step One: Make your calendar fit your schedule**
 - Your calendar and your schedule are not the same thing.
 - **Calendar** = Where you record and track meetings, phone calls and other appointments.
 - **Schedule** = Where you define how time should be spent on to achieve goals.
 - First, create your schedule and then fill in your calendar.



Steps to Time Success

- **Step One: Make your calendar fit your schedule**
 - Example:
 - Your sales activity plan calls for fifty outbound phone calls this week.
 - You know it will take a solid five hours to do this effectively.
 - So block out one solid hour per day to perform outbound calls.
 - This hour is scheduled first, then added to the calendar as an appointment...an appointment you have with yourself.



Steps to Time Success

- **Step Two: Align your schedule with your quota.**
 - Sales is, in large part, a numbers game.
 - Your goals must be reachable in the time you have set aside to reach them.
 - Calculate reasonable estimates of the time you need for each aspect of your sales responsibilities.
 - Plan accordingly so that you can meet your goals realistically.



Steps to Time Success

- **Step Three: Stop being “always available”**
 - Protect yourself from interruptions.
 - Turn off your phone, stop checking for messages and emails during blocked time.
 - Set aside time to check and respond in fixed periods each day.
 - **Be regularly available, but not always available.**



Steps to Time Success

- **Step Four: Plan backward, not just forward.**
 - Forward scheduling means:
 - I have to close \$100,000 in business this month.
 - I have 30 days in this month.
 - It's the first of the month. Go!
 - Backward scheduling means:
 - I have to close \$100,000 in business this month.
 - I have 30 days in the month.
 - I will plan from day 30 backward through the month based on sales plan.



Steps to Time Success

- **Step Four: Plan backward, not just forward.**
 - Start with these figures:
 - Sales revenue quota and average deal size
 - Number of opportunities you need to close
 - Percentage of opportunities that usually close
 - Number of opportunities you need in pipeline
 - Number of leads you need to convert
 - Percentage of leads that usually convert
 - Number of leads you need in pipeline



Steps to Time Success

- **Step Four: Plan backward, not just forward.**

- Example:

- Sales quota is \$100,000 per month
- Average deal size is \$10,000 per deal
- We need to close 10 deals per month
- 1 out of 3 opportunities usually close
- We need 30 opportunities in the pipeline
- 1 out of 5 leads usually converts to an opportunity
- We need 150 leads in the pipeline



Steps to Time Success

- **Step Four: Plan backward, not just forward.**
 - Then, ask yourself these questions:
 - Have you set aside time to make 150 calls for lead generation and probably another 150 calls to follow-up and qualify leads every month?
 - Have you set aside time to engage in web, phone, email and in-person selling to convert 30 leads into solid opportunities every month?
 - Have you set aside time to engage in intensive follow-up, proposal preparation, etc. to close 10 deals every month?



Steps to Time Success

- **Step Four: Plan backward, not just forward.**
 - Now, set activity targets and time allocations:
 - Leads: Block out 50 hours per month for lead follow-up phone calls (10 mins/call x 300 calls).
 - Opportunities: Block out 30 hours per month for phone, email and other follow-up (1 hour/oppty x 30 opportunities).
 - Deals: Block out 40 hours per month for activities associated with closing deals (4 hours per deal x 10 deals).



Steps to Time Success

- **Step Four: Plan backward, not just forward.**
 - In this example:
 - 160 hours available/month (8 hrs/day x 20 days)
 - Subtract 50 hours (leads)
 - Subtract 30 hours (opportunities)
 - Subtract 40 hours (deals)
 - 120 hours scheduled (leads/opptys/deals)
 - 40 hours unscheduled (other activities)
 - Prepare your day-to-day calendar according to this time allocation plan



Steps to Time Success

- **Step Five: Find a system and stick with it.**
 - You need a system for sales scheduling.
 - It can be any of the following:
 - Outlook or Google calendar
 - iPhone or Android app
 - Franklin Planner system
 - What matters is:
 - Start with a plan, then build your schedule, then manage your calendar.
 - Select a system and stick with it, period.



**Questions or
Comments?**



Key Takeaways

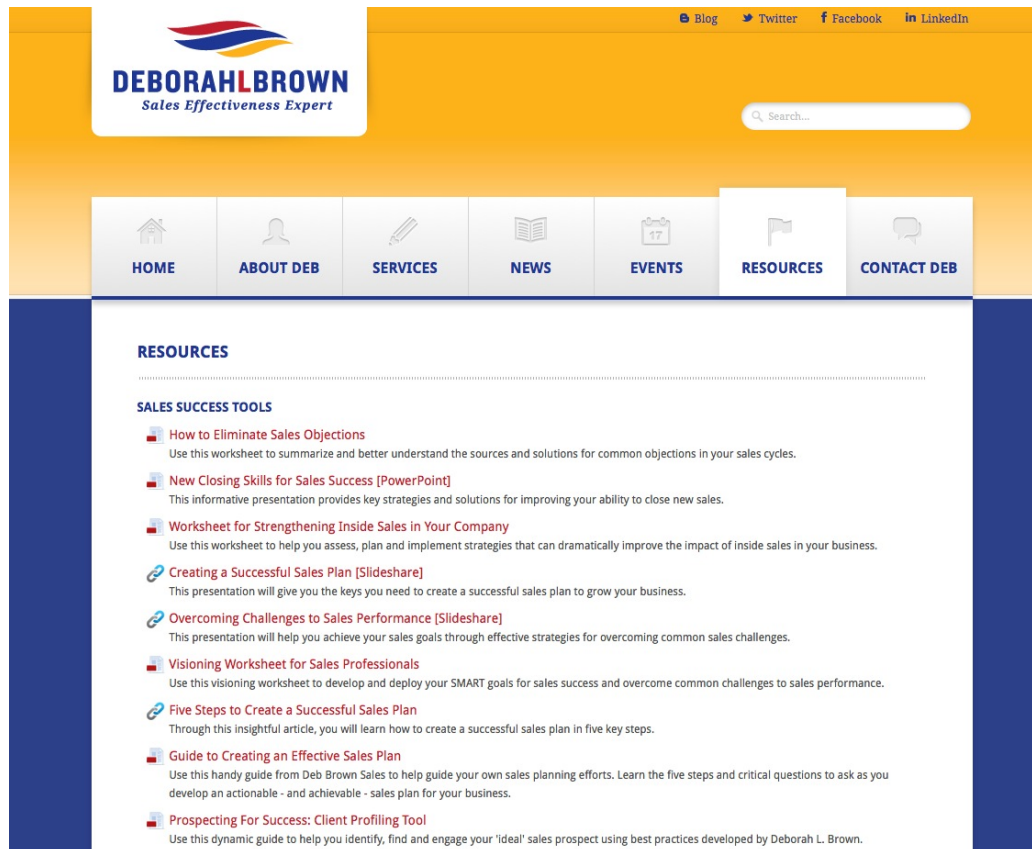


Key Takeaways

- Time is one of your most critical sales assets.
- Your quota must be aligned with the time it takes to generate the deals called for.
- Observe and track how you spend your time.
- Control time with a schedule that drives your calendar, rather than a calendar that obliterates your schedule.
- Plan your use of time backward (from the end goal), not just forward (from today onward).
- Use a solid system for time management.



Webinar Worksheet



- Free to webinar participants
- Available on our website under the **Resources** tab
- Includes key points & ideas



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Thank you!



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