Time is a fleeting thing…

A process for improving sales time usage and improving your sales performance along the way.

River Heights Consulting

12 Major Activity Breakdowns for Sales People

Background information:
Time is a fleeting thing. While many of us think of selling in terms of products and catalogs of services, the commodity we truly deal in is time. Selling is a hands on and emotional undertaking. Most of us were attracted to sales because of the people aspect. We love helping others, we love learning about our customers, and we are turned on by making things happen. But, it's easy to get distracted.

I originally started tracking my own time as a young salesperson. It came as a challenge from a mentor who had observed my actions first hand. When I told him I had difficulty doing everything each day, he demanded that I take time to understand where my workday went. He called it taking inventory. He suspected I let my time drain away in low value work. I can remember him saying, "Time is so easy to fretter away."

He challenged me to "log" my actual time spent in every activity in 15 minute intervals for a week. I bought myself a Casio watch with an interval timer and set it to beep every 15 minutes. When it "beeped" I made a quick journal entry as to my activities during that time. At the end of the week, I reviewed my time log. I discovered I spent about 20 hours a week in the car. This was back in "prehistoric times" before cell phones were invented. This realization did two things. First, it helped me plan my driving time to take better advantage of before work and lunch time driving (drive through restaurants prospered) and later (about 1989) it helped me justify the cost of a cell phone to my boss.

How to use the chart below:
Set a timer (this is important) to sound a beep, ring, or buzz at the end of each 15 minute point during your work day. For the typical sales guy, I recommend from 7:30 to 5:30, but your times may vary. At each beep, quickly put a "hash mark" in the appropriate category. Obviously, you cannot do this while making a major presentation, but during other portions of your day, record the activity instantly.

It's important to log a full week. A single day doesn't tell the story. After a week, analyze your data. Nearly everyone who has ever completed this exercise is surprised by at least one category of time usage.

For Sales Managers:
If you are interested in testing the "creative writing" skills of your team, demand that they turn the logs over to you. Instead, I recommend the exercise be done with a follow-up meeting going something like this:
"Are there any areas of time that surprised you?"
"How much of your time fell into the Group 2 and Group 3? Do you think any of this could have been offloaded to others?"
"If we changed our meeting schedule, how might we impact Group 4?"

One more tip:
My old Casio watch gave up the ghost many years ago. I have replaced it with the beep of a timer on my iPhone. I use a free app called "Repeat Timer". It works well and the price is right.

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Time	***Activity***	***Description***
Group 1		
	Customer Selling Activities	Time spent in the customer facility doing presentations, asking questions, demonstrating products and proactively selling.
	Customer Crib/Storeroom Work	Work done on the customer site evaluating inventory, counting parts in stock, developing recommended orders and other administrative tasks. Also includes time spent working with customers to handle warranties, returns, and organization.
	Researching Products per Customer Request	Competitive cross references, internet research, researching customer specifications and other work required to find a part number which can be placed on a customer quotation.
	Providing Technical Assistance	Many of today's products require configuration, programming, and a bit of customer hand holding to get them up and running. Often, salespeople are asked to look at issues within their customer's facility.
Group 2		
	Preparing Quotations	Laying out the right bills of materials, catalog selection, data entry, arranging special prices and preparing the proper verbiage for customer quotations.
	Price, Delivery, Order Entry, Open Orders	Routine price and deliver questions. Typically these are simple questions which involve information available on the ERP system or via a phone call to suppliers. Entering Orders into the ERP system. Following-up on open orders which you entered personally.
	Expediting Orders	Time spent with factory or inside sales teams working on getting parts to the customer faster than the normal delivery.
Group 3		
	Fixing Order Issues with Customer	This includes the following: Special handling, expediting orders of the right stuff when the original order was wrong, deliver of parts to make the order right, adjusting pricing errors and any other activities associated with fixing things with the customer.
Group 4		
	Sales/Company Meetings	Time spent in company sales meetings, vendor product meetings, company-wide presentations and other meetings. Include time spent traveling to the meeting.
	Administrative Time	Time devoted to expense reports, CRM, routine paperwork and call report data.
Group 5		
	Appointments, Planning and Analyzing Data	Time spent setting appointments, planning calls, researching customer information falls here. So too does time spent targeting accounts. This also includes time spent laying out long term strategies and developing quarterly, annual sales plans which typically involves the analysis of customer sales data.
Group 6		
	Travel Time	Time spent traveling to customers. Are we scheduling things properly or zigzagging from one corner of our territory to another?
Other Notable Time Uses		

More about River Heights Consulting

River Heights Consulting is a thought leader in the field of Knowledge-based Distribution. Frank Hurtte and his team focus on improving sales process for distributors and their supply partners.

Frank Hurtte does keynote presentations, sales training, formal mentoring and serves as a senior advisor to a number of distributor organizations. He can be reached at 563-940-4151 or via email at frank@riverheightsconsulting.com. There is never a cost for chatting about your issues.

We have a number of useful tips and hints on our weekly blog – The Distributor Channel. http://thedistributorchannel.blogspot.com

Frank Hurtte's latest book is now available on Amazon. One distributor calls it "A license to make money". Read it and discover for yourself.