

Enable Your Team to Spend More Time Selling

Before you can start removing friction from your team's day-to-day work, you need to understand how each salesperson is spending their time. That's going to require you to observe them carefully.

On the next page, you'll find a Sales Rep Efficiency Audit. Use it to list all the activities your reps spend a significant amount of time on during a given day. For each of those activities, calculate how many minutes they spend on that activity each day, how many tools they have to use in the process, their pain level (on a scale of low, medium, or high), and your recommendations for improvements.

The first time you do this audit, the time spent will be an estimation, but its accuracy will improve over time. If you monitor one rep for one day, you won't learn as much as if you monitored that rep for a whole week. And if you monitor one rep for a whole week, you won't learn as much as you would if you monitored every rep for a week. But it's okay to start small. Collect a little information, even if it's just estimates, with the understanding that the numbers will shift as you collect more data.

Measuring the number of tools used should be much simpler. You can watch a rep doing their job and count the number of tools they use. Or you can ask your team to brainstorm a list of tools they use for each activity. Either way, you'll be able to get a fairly accurate count fairly quickly.

Pain level is more of an intuitive measure, but if you spend time observing your team, it should become clear which activities cause them the most pain. Where do they get frustrated? Where do they have to repeat the same motion multiple times? Where do they make mistakes or skip steps? These are symptoms of a painful activity. On the other hand, if they're working efficiently without getting lost along the way, that's a good sign that an activity is mostly painless.

Once you've collected all your observations, make some recommendations. For high-pain activities, how can the pain be reduced? For activities that require multiple tools, how can they be simplified? For activities that are taking a lot of time, how can they be streamlined? These are the places where you need to advocate for change.

Sales Rep Efficiency Audit

Activity	Time/Day	# of Tools	Pain Level	Recommendations