



The 5

# PRODUCTIVITY SECRETS OF SUCCESSFUL SALESPEOPLE



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## MEET ASTRO AND FRIENDS

As you may have noticed, the style of this e-book is inspired by the great outdoors and U.S. National Parks. Why? Because they express a feeling of fun, adventure, and exploration – and Salesforce is all about empowering people to blaze their own trails and be part of something greater. Pretty cool, huh?

If you want to know more, check out Trailhead, the fun way to learn about Salesforce. Get started today at [salesforce.com/trailhead](https://salesforce.com/trailhead).



# INTRODUCTION

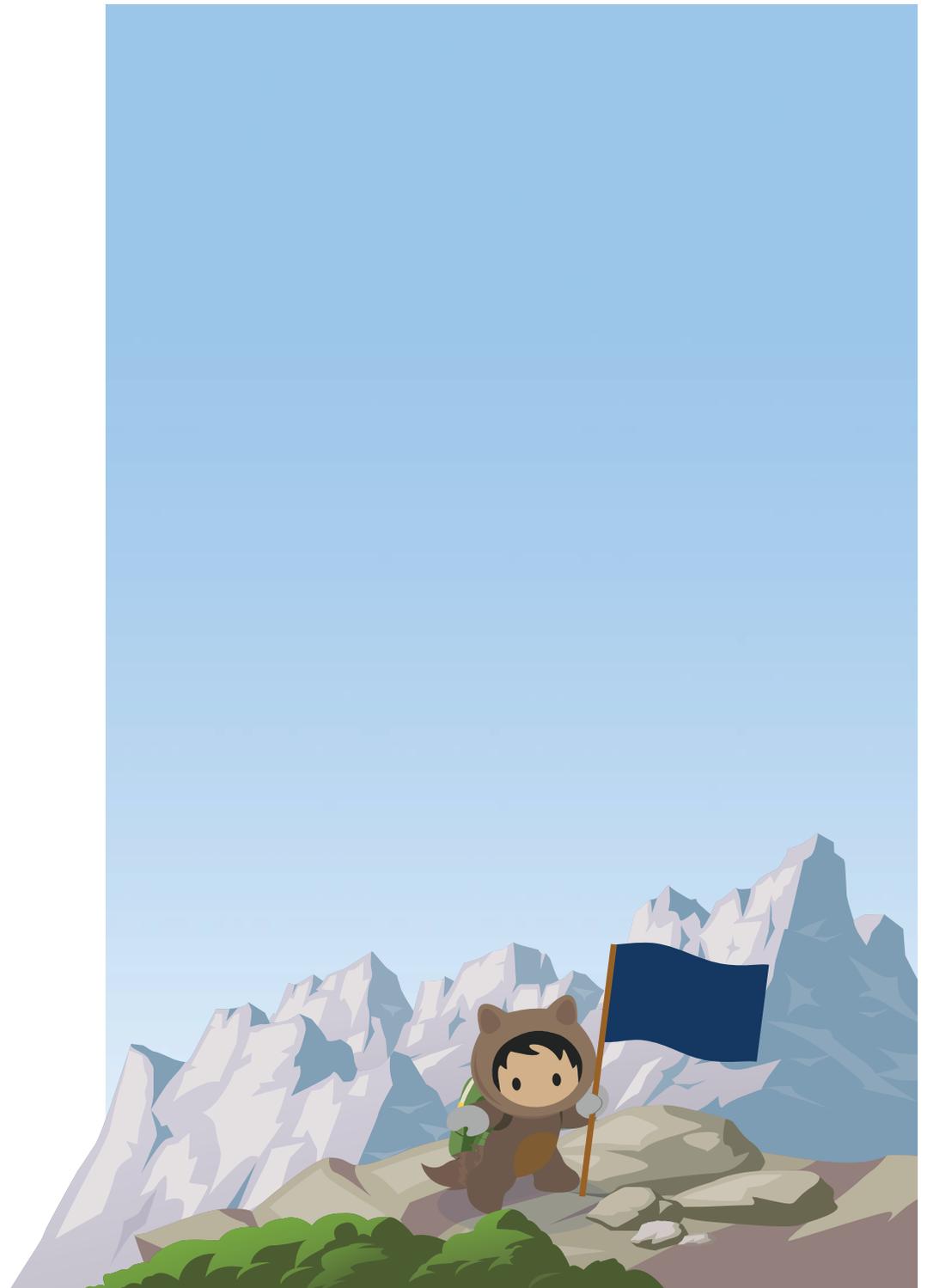
When it comes to self-motivation and drive, salespeople have it in spades.

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You know how to dig deep and push harder each day to make that last call or log those final critical activities. But the best sales reps are always on the hunt for new ways to work, not just harder, but smarter, too.

Consider that the average sales person only spends about one-third of their day selling. The other 66% of the time is mostly eaten up by research, admin, and reporting tasks. Sound familiar? It's no wonder that demand is high for new tips and better tools to supercharge productivity and give you back the time you need to focus on building valuable relationships with customers.

In this e-book, we share advice from trailblazing sales leaders on the best ways to improve productivity and collaboration. Read on to find out how you can maximize time spent selling and focus on what matters most: connecting with your customers.





### Secret #1

## START YOUR DAY OFF SMART – MAP OUT YOUR PATH TO SUCCESS.

The most successful salespeople don't let the day happen to them; they show the day who's boss. To close more deals and beat your quota, map out exactly where you want your day to take you. Think of it as your trail to achieve your daily goals, from the first steps you take each morning to wrapping up an uber-productive afternoon.

## SECRET #1 | START YOUR DAY OFF SMART

### WIN THE MORNING.

Your most productive days don't start at a desk. They start the night before. Go to bed in time to wake up early – then take the time to eat right, meditate, exercise, or do whatever it takes to focus your energy. Because the stronger you start your morning, the better shape you'll be in to win the whole day.

Then when you do sit down to work, follow this rule: Take charge of the day, not the other way around. High performers swear by the value of planning for each day the evening before so you can hit the morning running. Determine your highest priorities for the day, and set aside enough time to accomplish them. Activities like prospecting, researching, meeting prep, and admin tasks all demand focus. Setting aside a specific block of time for each task is [a highly productive, quota-crushing trick](#).



Tim Ferriss calls email “everyone else’s agenda for your time.” Here’s how you can take back control.

Of course it’s tempting to dive into email first thing in the morning, but there are good reasons to resist that temptation in particular. Productivity hacker [Tim Ferriss](#) recommends recalibrating our view of the email inbox as “everyone else’s agenda for your time.” Take back control by exploring apps and tools that help you optimize your use of email and limit its power to distract. Consider tactics like turning off notifications, filtering emails for later review, snoozing emails that don’t need an immediate response, or scheduling a specific time to manage email.



## SECRET #1 | START YOUR DAY OFF SMART

### KEEP UP THE PACE.

Most people can only concentrate for 90 minutes on a given task before their mind begins to wander and productivity wanes. It might sound counterintuitive, but the best way to stay alert and efficient is to take a break every 1.5 hours. In fact, underperforming salespeople are 1.5x more likely than high performers to report a lack of down time in an average week.

Many of us see lunch simply as a break or opportunity to make up for time already lost. But your noonday meal is actually prime relationship-building time. Use lunch as an opportunity to meet with a client, or even a co-worker you don't normally see. You might be surprised by the ideas, breakthroughs, or inspiration you get from a shared lunch, as opposed to powering through a sandwich at your desk.

And on the subject of collaborating with teammates . . . The ability to share your load is what sets productive workers apart from merely hard workers. Successful sales reps rely on their teams to accomplish far more than they ever could on their own. Ask yourself which is more productive: working hard to adjust a slide presentation with the perfect bullet-point font size, or enlisting the help of your marketing or support team to refine the deck while you work on landing new meetings?

*"State of Sales" Report (Second Annual), Salesforce Research*





“You’ll never waste more time than attempting a task that is neither urgent nor interesting, even if it’s a top ‘priority.’ And you’ll never do anything as well as something that you’re actually interested in doing. Trust me on this one. ... Follow your energy.”

**JASON JORDAN, PARTNER AT VANTAGE POINT PERFORMANCE**

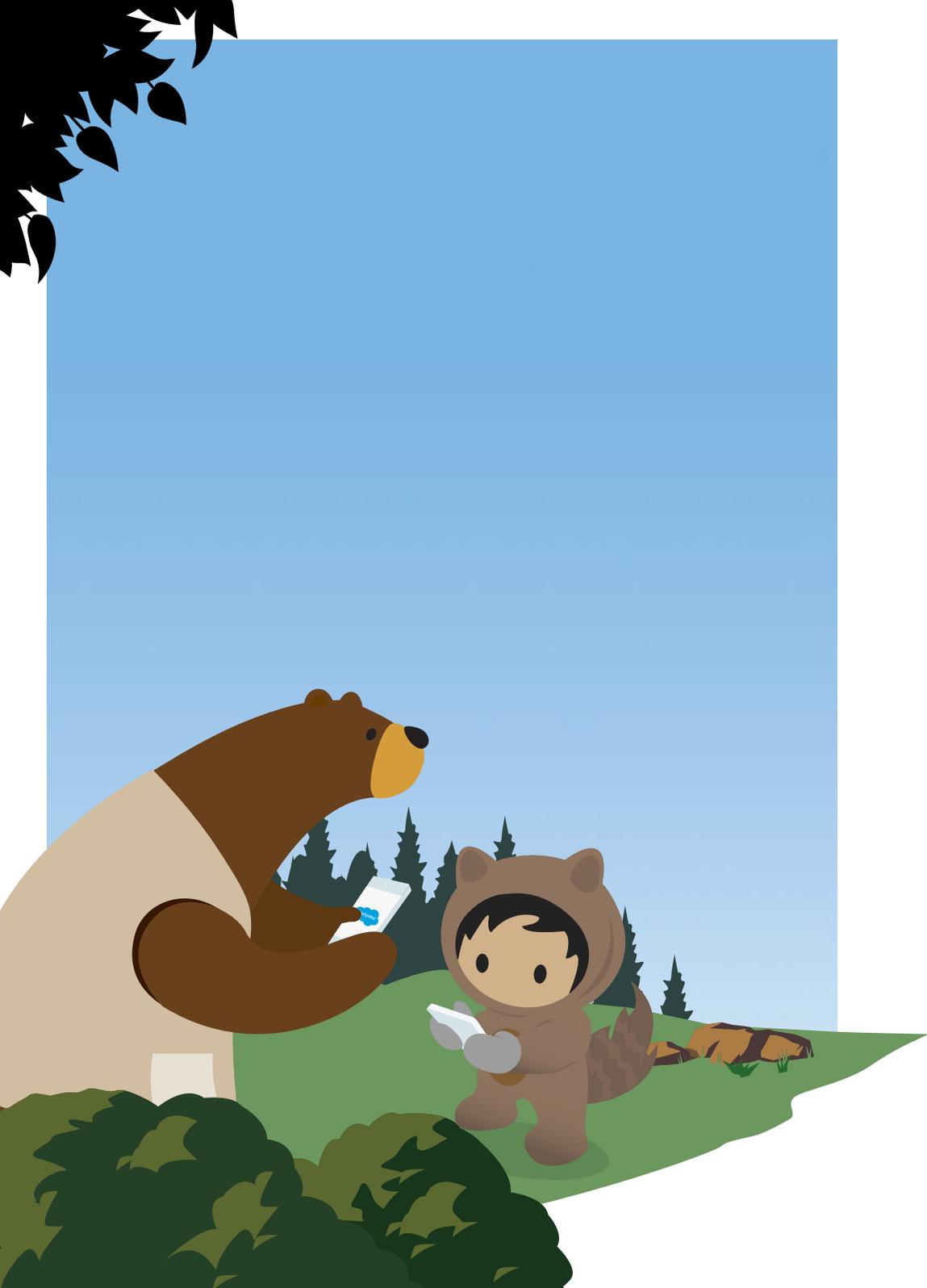
Read more from Jason on [Quotable.com](#).

## HOW HIGH-PERFORMING SALESPEOPLE SELL SMARTER, FASTER.

Looking to take your productivity even further? We combed through performance patterns and trends from over 3,100 global sales professionals to bring you insights into the tools and techniques that today’s top-performing sales teams say are critical to their success.

[GET THE REPORT](#)





*Secret #2*

## STAY PRODUCTIVE ON THE GO.

Don't leave your sales behind when you hit the trail. It's more important than ever to have the mobile tools you need to access customer information in the moment, so you can work anywhere, from any device.

## SECRET #2 | STAY PRODUCTIVE ON THE GO

### SET YOURSELF UP FOR ON-THE-ROAD SUCCESS.

Salespeople are on the road a lot, often enough that most consider their “office” to be anywhere they are. In fact, 72% of high-performing salespeople say that being able to run sales activities on their phone is very important to their sales process. And in order to make the most of their time spent on the go, the best reps know how to configure their smartphone – and their day – so they can optimize every minute and every customer interaction.

Today’s savvy field salespeople can stay productive for days without opening their laptops. To better manage email on the go you can dictate messages with increasingly accurate voice-to-text, get related customer data from your CRM, streamline meeting scheduling,

and automatically log emails related to specific opportunities.

Mobile CRM apps now tap into virtually everything related to the sales process – allowing you to intelligently manage leads and opportunities all the way through to closing a deal. Other must-have smartphone apps deliver on the go on organization and reminders, file storage, and collaboration capabilities that we could only dream about until very recently.



**72% of high-performing salespeople** say that being able to run sales activities on their phone is very important to their sales process.

“State of Sales” Report (Second Annual), Salesforce Research





## CUSTOMER STORY

Oldcastle is North America's largest manufacturer of building products needed to build communities, even the bridges and highways to get you there. For a while, growth was tremendous, and the company's sales reps were so busy they could almost sit back and take orders. But the 2008 economic downturn brought an end to business as usual. Suddenly, the company's sales reps had to become much more proactive to grow sales across a diverse portfolio of products.

After examining its internal team and processes, Oldcastle's sales leaders saw how multiple, disconnected systems created inefficiencies and a lack of visibility. Some reps used an old CRM, some used spreadsheet, and some stuck with pen and paper. Insights that were stuck in binders and spreadsheets couldn't be shared with the rest of the organization.

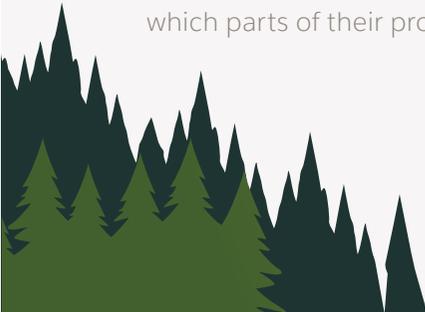
To give reps complete visibility into their customers, Oldcastle turned to Salesforce. Using Sales Cloud to collaborate and surface insights, reps could now clearly see which customers had been using which parts of their product portfolio, and where opportunities

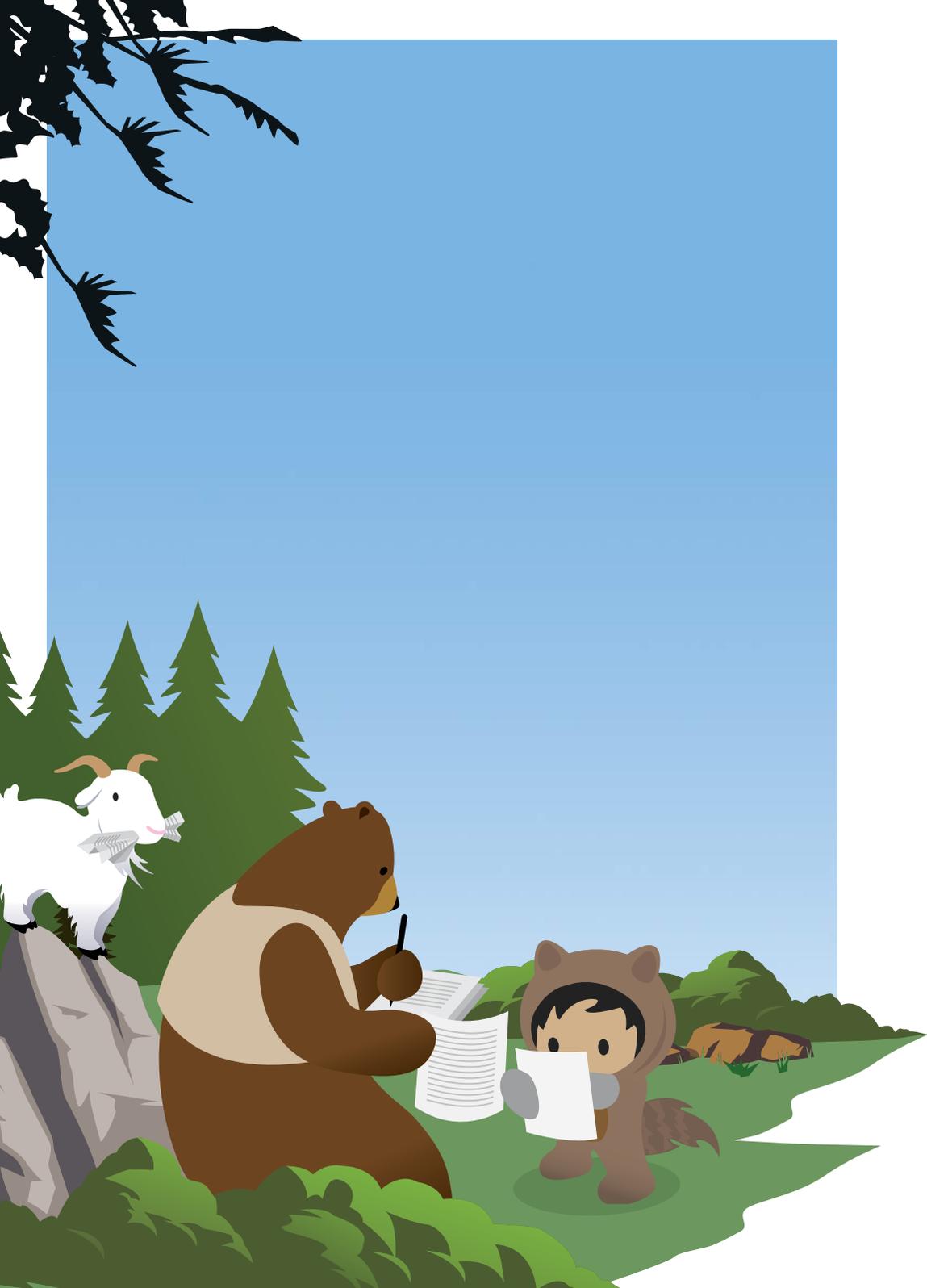
for untapped growth lay. To ramp up productivity, Oldcastle built a custom mobile app that made it extremely easy for reps to find insights and hold productive customer meetings from anywhere.

Following its mobile initiative, Oldcastle saw a 29% increase in annual sales calls and annual sales revenue. Where it used to take reps hours to identify projects and specs, now they are able to find answers within minutes. Ultimately, Oldcastle is succeeding in making their reps as efficient and as effective as possible by using modern customer relationship tools from Salesforce.

“Customers are surprised how much reps know about their business, and it's because of Salesforce”.

**JUSTIN REED, CRM DIRECTOR**





*Secret #3*

## CONQUER SMALL BUT MIGHTY TIME WASTERS.

Often, it's the smallest time wasters that eat up most of your day. To take control of your productivity, you must first take control of your time. That means eliminating those seemingly benign, insignificant tasks that keep you from making that phone call or sending that important email, so you can focus your energy on building the customer relationships that really count.

## SECRET #3 | CONQUER SMALL BUT MIGHTY TIME WASTERS

### TO SAVE TIME, TRACK WHERE YOU SPEND IT.

Research shows that 41% of salespeople say they spend too much time on administrative tasks in an average week. Are you one of them? If so, consider tracking your activities for a few days to get a view of the tasks taking the most time. Then compare the time you're spending to the time you could be saving. How long should it really take to research a lead, send an email, or check LinkedIn? There are plenty of apps out there that can help you track just how many hours and minutes you spend on various activities. Test one out to pinpoint specific ways you can start managing your time better – the results might surprise you.

A few helpful tips to start pruning those little time wasters: Schedule 20-minute meetings instead of 30, check your email at preset times only, and always mind the clock. For example, if you want a task to take you 45 minutes but it's dragging into an hour, move on to something new and return to it later with fresh eyes and renewed energy.



**41% of salespeople** say they spend too much time on administrative tasks in an average week.

"State of Sales" Report (Second Annual), Salesforce Research



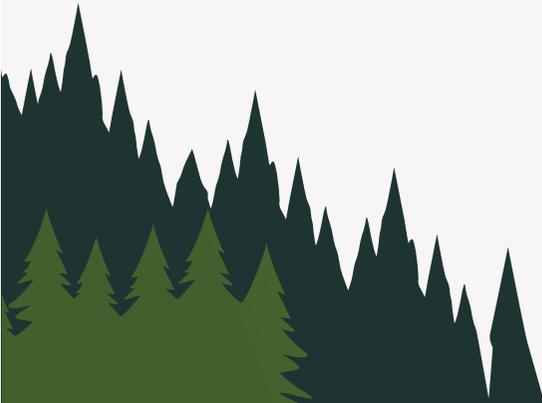
## SECRET #3 | CONQUER SMALL BUT MIGHTY TIME WASTERS



“Salespeople try to be more productive in myriad ways: Get up to speed faster on product updates, integrate their CRM with their email, buy a faster laptop, or upgrade to the latest technology. These approaches are fine and can definitely boost performance. But the biggest time waster of them all is personal disorganization. If you don’t have good workflow and personal time-management systems, you’ll waste hours each day fiddling around with your emails, to-do lists, pending items, and incoming information. And you often don’t know you don’t know how to improve until someone shows you a better way.”

**LAURA STACK, AWARD-WINNING PRODUCTIVITY SPEAKER  
AND BEST-SELLING AUTHOR**

Read more from Laura on [Quotable.com](https://www.Quotable.com).





#### Secret #4

## USE DATA INSIGHTS TO PRIORITIZE NEXT STEPS.

Having access to sales performance metrics and data insights – in a format that’s easy to understand – is now fundamental to connecting with customers. Just as Google Maps has made the glove box fold-out map obsolete, customizable sales dashboards that give you real-time, actionable insights from your phone or tablet are replacing the clunky, static reports of old.

## SECRET #4 | USE DATA INSIGHTS TO PRIORITIZE NEXT STEPS

### BE EMPOWERED WITH ACTIONABLE INSIGHTS.

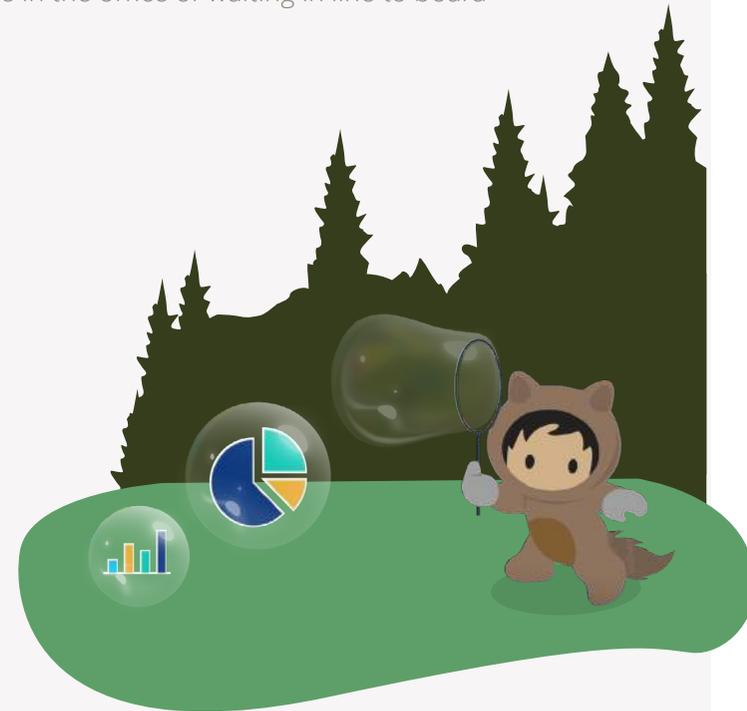
Dashboards aren't just a way for sales leaders to keep tabs on team performance anymore. New sales tools include intelligence and analytics capabilities that transform dashboards from simple reporting mechanisms into interactive guides that pave the way to stronger relationships. Individual reps can use them to analyze white space in their customer base to sell in a more targeted way, or keep a close eye on their deals and renewals. Need proof that access to great dashboards matters? High-performing salespeople are 11.3x more likely than underperformers to rate their team's analytics and insights capabilities as outstanding.

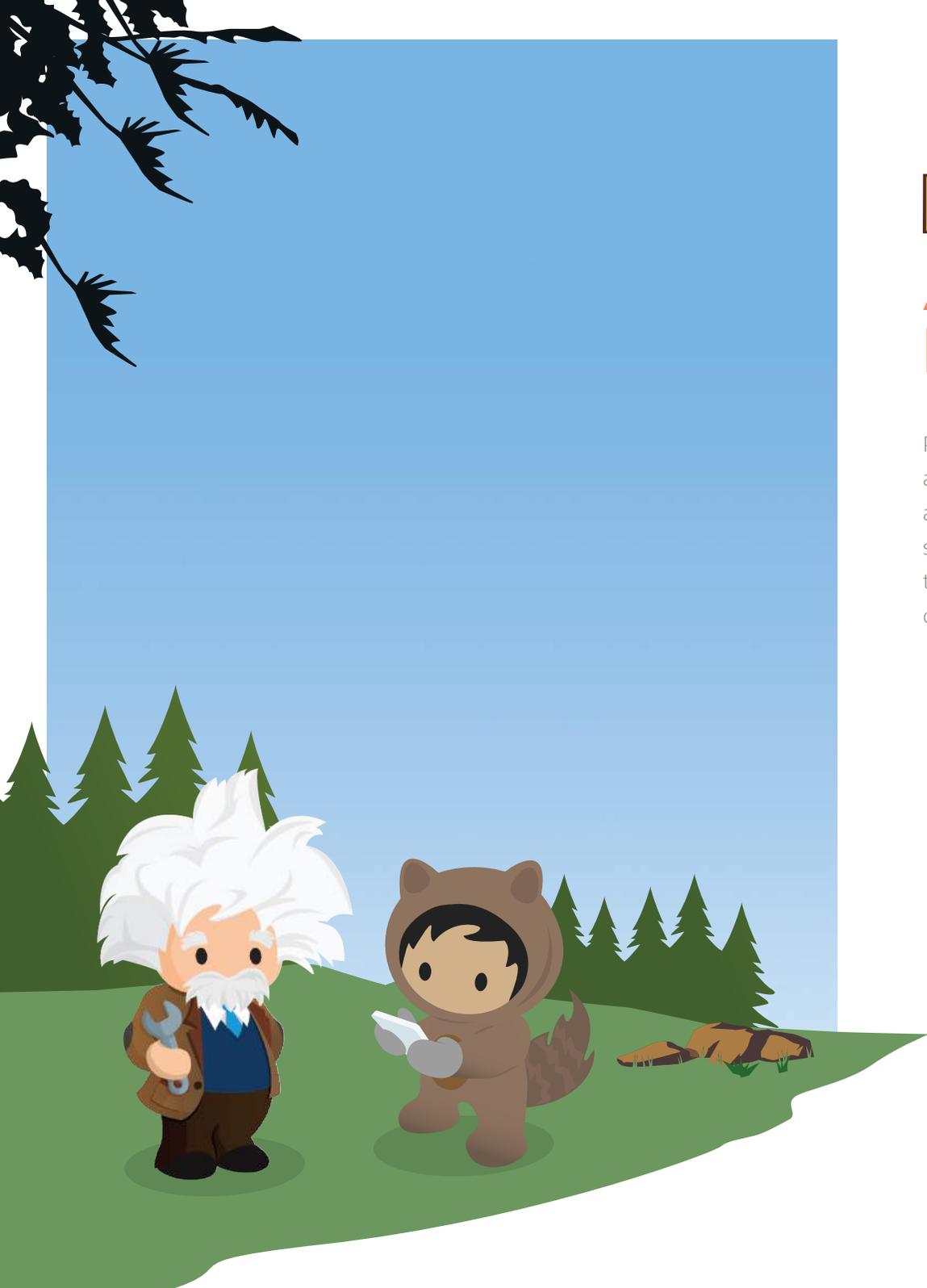
With the latest reporting capabilities, anyone – from a business development rep to the VP – can forecast deals and keep an eye on pipeline, track the right behaviors like meetings and calls, or identify when activities aren't getting done or deals aren't getting pushed. The right dashboard tools can give you the insights you need to make quick decisions on how to prioritize tasks for maximum impact, whether you're in the office or waiting in line to board your next flight.



High-performing salespeople are **11.3x more likely** than underperformers to rate their team's analytics and insights capabilities as outstanding.

"State of Sales" Report (Second Annual), Salesforce Research



An illustration of an elderly man with a large white beard and hair, wearing a brown jacket and holding a wrench. He is standing next to a young boy dressed in a brown bear costume, who is holding a white envelope. They are in a forest setting with green trees and a blue sky. A log lies on the ground between them.

*Secret #5*

## **AUTOMATE AS MUCH AS POSSIBLE.**

Productivity today is about doing what you do best – and automating the rest. And while administrative and routine tasks are necessary, the key is to find the ones that can be done at the same level without you. The most productive salespeople use technology to automate everything that steals time from their core mission of developing and deepening human relationships.

## SECRET #5 | AUTOMATE AS MUCH AS POSSIBLE

### AUTOMATE THE SMALL STUFF IMMEDIATELY.

Many tasks start small but end up consuming a ton of time (see Secret #3). Many of these activities can be automated and taken off your plate right now. For example, use keyboard shortcuts on your computer or mobile device to automatically type frequently used words or phrases, like your email address or personal intro.

But keyboard shortcuts only hint at the full power of automation. The most successful salespeople automate the majority of their sales process – all those small but time-consuming updates, reporting, and notification steps that make the sales engine run. High-performing salespeople are 7.2x more likely than underperformers to say their team has outstanding process automation. Coincidence? Not likely.

With the right tech solutions, you can automate email alerts for deals over a certain size, auto-assign tasks as a deal moves through different stages, and more. It only takes a few point-and-clicks to set up intelligent automation that can give you back more and more time each day to devote to what you do best: actual selling.



High-performing salespeople are **7.2x more likely** than underperformers to say their team has outstanding process automation.

"State of Sales" Report (Second Annual), Salesforce Research



## SECRET #5 | AUTOMATE AS MUCH AS POSSIBLE

### CLOSE FASTER WITH AUTOMATED APPROVALS.

Picture this: You're ready to close a deal you've been working for months, but at the last minute the customer requests a discount. You're pretty sure it will go through, but the person who normally approves these is out of the office, and no one is sure where to turn.

Make sure your deals stay on track by automating every approval, so you know your requests will get routed to the right person every time, no matter what.

Think some approvals are just too complex to get automated? Think again. From the simple (travel expenses) to the complex (pricing and discounting), we have the tools now that will let you automate the process – and ensure that each proposal, quote, and contract is consistent and accurate. Better yet, flexible templates let you customize automation flows to your team's unique needs and preferences.



“Saying that you’re too busy to automate is like furiously digging holes with your bare hands and saying you’re too busy to look up and grab a shovel.”

**IMAN MAGHROORI, MASTER SOLUTION  
ENGINEER, SALESFORCE**

Read the rest of Iman's article on [Quotable.com](https://www.quotable.com).

## SECRET #5 | AUTOMATE AS MUCH AS POSSIBLE

### ACHIEVE PERSONALIZED OUTREACH WITH PUSH-BUTTON EASE.

It takes time, attention, and energy to juggle dozens of accounts, manage countless meetings, and respond to dozens of follow-up emails and tasks every day. Ever wish you could wave your magic wand and someone – or something – would automatically do all that for you?

Innovative new technologies are now making that more realistic than you might think. They combine your inbox, calendar, and CRM data together in one place and automatically surface relevant data on every email, making it easier to send personalized messages, update your pipeline, and log sales activity. All it takes is a few swipes of the finger on your phone between meetings, and you've done in two minutes what used to take you fifteen. Over a whole week, you get hours back.



“Salespeople spend hours every week on back-and-forth communication around calendaring. The most productive salespeople are now using tech to automate that entire process and make it a one-click-and-done situation.”

**TRISH BERTUZZI, INSIDE SALES EVANGELIST AND AUTHOR OF  
THE SALES DEVELOPMENT PLAYBOOK**

Read more from Trish on [Quotable.com](https://www.quotable.com).

## SECRET #5 | AUTOMATE AS MUCH AS POSSIBLE

### USE AI TO FIND MORE TIME TO SELL.

Artificial intelligence offers a lot of opportunity to take your productivity to a whole new level. Predictive lead scoring can prioritize opportunities and pinpoint your next best steps. Smart apps can surface real-time client updates automatically and schedule calls and send reminders for you. No, this isn't science fiction – it's AI and CRM coming together to give you back time to build those all-important human relationships that keep deals flowing. How's that for working smarter?



“You could say to your phone, ‘Show me leads I’m supposed to talk to today,’ and it does those operations for you: analyzes which ones are at which stage, finds the hot leads, and gives you a ranking of which ones you should talk to first, a probability of converting, and the expected monetary value when converted.”

**CHALLENGE MASEKERA, DATA SCIENTIST, SALESFORCE**

# CONCLUSION

Successful sales teams are distinguished by their ability to work smarter, not just harder. They know how to start their days right, work from anywhere, skip small time wasters, use data insights, and get the most from AI.

Of course it's not always easy to keep up with today's customers. But by adopting a few secrets from the pros, you can increase productivity in all these areas. Follow the tips we've covered in this e-book and you'll have more time to do what really counts: build the sales relationships that matter most.



## GET EMPOWERED WITH SALES SOLUTIONS BUILT FOR PRODUCTIVITY.

Want to focus on what really matters in sales: relationships? Salesforce helps reps optimize their efforts and win every deal with productivity and collaboration tools that maximize time spent selling – from anywhere and on any device. Discover the cloud-based tools that will give your sales team the power to connect with customers like never before.



Sales Cloud Einstein



Salesforce Inbox



Salesforce for iOS  
and Android



Sales Cloud Lightning

[LEARN MORE](#)



**Blaze your trail.**



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