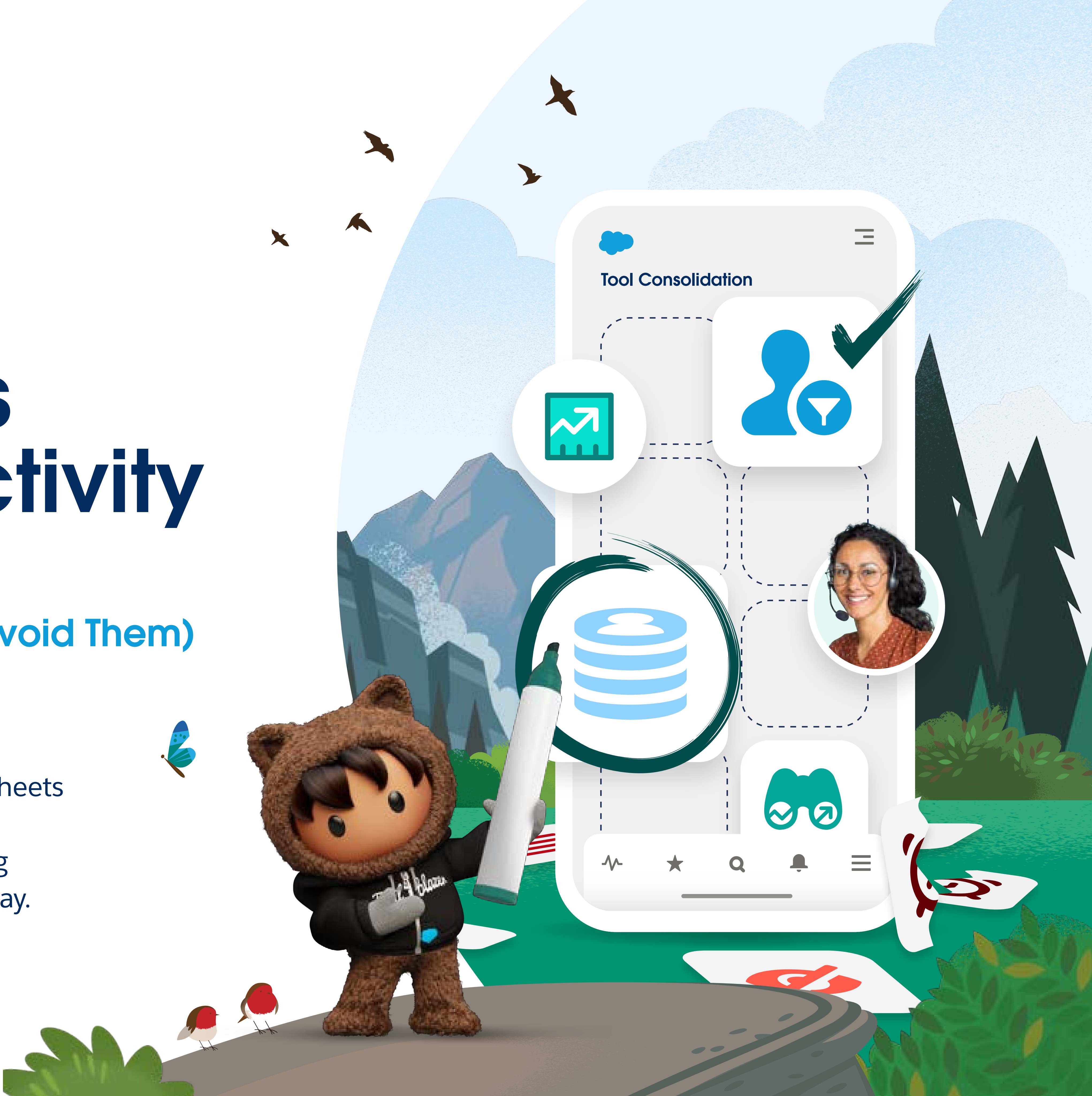
WORKBOOK

8 Sales Productivity Pitfalls

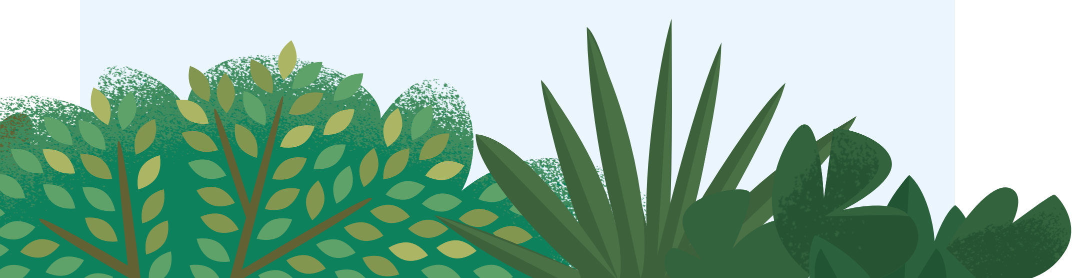
(and Steps to Avoid Them)

Get easy-to-use worksheets and tips from sales experts to start driving productivity gains today.



Seventy-two percent of sellers' time is wasted on non-selling tasks, according to our Trends in Sales Ops report, a survey of more than 7,700 sales professionals. The good news? There are straightforward ways to refocus reps on the things that matter the most.

Start here. We share how to avoid eight common productivity pitfalls that eat into revenue and hold sellers back – along with worksheets and resources to help.



Common Sales Pitfalls:

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01

Pitfall

Sales team spends too much time in tools.

Sales teams use an average of 10 tools – from reporting to contact management to forecasting – according to our State of Sales report. Many of these tools come on different platforms, creating a disjointed patchwork of different data, fields, and dashboards.

Sellers are feeling the pain. Two-thirds said they feel overwhelmed. It's hard to be productive when you're toggling back and forth between point solutions to get the job done, and all that time spent in tools means less time spent with customers.

Solution

Consolidate your tools to lower your costs and give your reps time back to spend with customers.

You'll be joining the 94% of sales teams that plan to simplify their tech stack in the next 12 months. Here's how to do it:

1. **Inventory your tools.** You may find that functionality overlaps between some tools, and that you're not fully using others.
2. **Prioritise your multifunction tools over single-function tools.** Make the most of tools with multiple features, so reps don't have to switch so often.
3. **Where possible, remove point solutions and seldom-used tools.** Eliminate multiple platforms to reduce time-wasting tasks like redundant data reentry, driving productivity for the team.

SIMONE THOMPSON
Head of Sales and Growth at Itoc

"**Evaluate each tool for ROI** – not only from a business perspective, but also from an employee efficiency perspective. Your tools should help you automate and scale in the long term, as well as satisfy your needs in the short term."

01

Tech Consolidation Worksheet

Every quarter, take stock of your tools and compare their available features with the features you're using. Then, identify opportunities to consolidate without losing critical features and create an updated tool list.

Start by identifying the tools you use, what their features are, and how you use them. Then, identify opportunities where you can consolidate or cut ones that are no longer helpful.

	TOOLS	FEATURES USED	FEATURES AVAILABLE	YEARLY COST	CRITICAL TO SALES PROCESS?	ACTION	CONSOLIDATION NOTES
EXAMPLE	CRM	Contact management	Contact Management, Pipeline Management, Dialer, Email, Quotes	$100	● Yes ○ Somewhat ○ No	● Keep ○ Cut ○ Consolidate	Integrate email, remove separate email platform
					○ Yes ○ Somewhat ○ No	○ Keep ○ Cut ○ Consolidate	
					○ Yes ○ Somewhat ○ No	○ Keep ○ Cut ○ Consolidate	
					○ Yes ○ Somewhat ○ No	○ Keep ○ Cut ○ Consolidate	
					○ Yes ○ Somewhat ○ No	○ Keep ○ Cut ○ Consolidate	
					○ Yes ○ Somewhat ○ No	○ Keep ○ Cut ○ Consolidate	
					○ Yes ○ Somewhat ○ No	○ Keep ○ Cut ○ Consolidate	
					○ Yes ○ Somewhat ○ No	○ Keep ○ Cut ○ Consolidate	

TOTAL TOOLS: **TOTAL YEARLY COST:**

Ready to finalise your tools list? Continue to the next page.

01

Consolidated Tool List

TOOLS	FEATURES USED	FEATURES AVAILABLE	YEARLY COST	DATE WHEN LAST REVIEWED

TOTAL TOOLS: **TOTAL YEARLY COST:**

Watch the Sales Cloud demo to see how your team can be more productive on a single platform.

02

Pitfall

Sellers don’t know when to advance customers to the next stage in the pipeline.

A sales pipeline without clearly defined stages makes it difficult to know when to move deals forward.

“Technology should enable and enhance your sales team, says Justin Le Roux,” SVP, Chief Operating Officer, ANZ and ASEAN. “You don’t want your reps wasting time operating clunky systems when they could be focusing on closing deals.”

For example, if sellers don’t have guidance for when a deal is ready to advance down the pipeline, then qualified and unqualified opportunities may end up assigned to the same stage – creating confusion and muddy pipeline data.

Solution

Define each stage in your sales pipeline with clear exit criteria, so your sellers always know the next step to take. Here’s how to begin:

1. **Name and define your sales stages.** Break the sales journey down into the basic activities that advance deals to close (think calls made or meetings set).
2. **Define the exit criteria for each stage.** List what needs to happen before the prospect can move to the next stage. (For example, the prospect says you’re short-listed.)
3. **Make it easy for sellers to update pipeline data.** Bring in tools that help sellers update customer records in a click, and connect tools together so they don’t have to make redundant updates.

TOM HYDE
Head of APJ Sales and Success at Canva

> **Build out a clear customer-centric view for your reps.** This will help them understand where they can spend time with customers, where they will see value and ensure the company has a clear view of its customer base.

02

Pipeline Management Worksheet

Bring structure to your sales process. Slot deals to well-defined stages so you always know their status – and the next best step to take.

1 Define the stages in your pipeline.

The sales process goes from cold leads to warm opportunities to red hot deals. Name your stages based on the actions you need to take along the way. (For more sales pipeline guidance, check out this article.)

	STAGE 1	STAGE 2	STAGE 3	STAGE 4	STAGE 5
EXAMPLE	Qualify	Discover	Select	Negotiate	Close

2 Identify the activity to advance every deal.

List out the steps that sellers should take to move customers down the pipeline, including the stakeholders who should get involved.

	EXAMPLE	STAGE 1	STAGE 2	STAGE 3	STAGE 4	STAGE 5
		Qualify	Discover	Select	Negotiate	Close
Who is in charge of this stage?	Sales / Business Development Reps (SDRs and BDRs)					
What activities happen in this stage?	SDR confirms right persona and pain points 1st meeting set					
What are the exit criteria for the customer to advance to the next stage?	1st meeting accepted					

Template courtesy of Richard Harris.

See how Revenue Intelligence helps you manage your pipeline and create more accurate sales forecasts.

03

Pitfall

Sellers aren’t tapping the full potential of their territories.

Sixty-nine percent of sales professionals told us their job is harder now, according to the State of Sales Report. “Reps often feel like they don’t know where to act or when,” said Dave Borrelli, Senior Vice President of Sales at Salesforce. “Throughout my career, I’ve seen this feeling come on as sellers try to make sense of their territories.

You have a productivity problem if your sellers get assigned to their area, but they don’t know which opportunities to prioritise or how to uncover new leads.

Solution

Give your sellers visibility into the hottest opportunities in their territories by setting criteria for big-win accounts. Here’s how to help your sellers:

1. **Prioritise high-impact accounts.** Help sellers quickly understand the potential revenue impact of every prospect based on their likelihood to close or renew.
2. **Render territories as maps, not spreadsheets.** Let sellers see their territories – and high-impact accounts – visually, rather than as data in columns and rows.
3. **Help sellers capture information more efficiently in the field.** Use technology that can capture and sync their deal updates across tools, so they don’t have to waste time with manual data entry.

ARCHANA SUBRAMANIAN
EVP and COO,
MuleSoft at Salesforce

> **Prioritise change.** Focus on one segment or region you want to tackle first, get your army focused and make sure the data is excellent first before scaling further.

03

Account Prioritisation Worksheet

Make a list of your active accounts, and prioritise them based on their likelihood of closing and potential deal size.

1 Profile existing accounts.

Answer the following questions about your active accounts to identify high-value opportunities.

ACCOUNT NAME	**FITS IDEAL CLIENT PROFILE?** (YES / NO)	**BUDGET AVAILABLE?** (YES / NO)	**STRONG RELATIONSHIP WITH DECISION MAKER?** (YES / NO)	**WHAT PRODUCTS ARE THE BEST FITS FOR THE CUSTOMER?**	**WHAT IS THE HIGHEST POSSIBLE DEAL AMOUNT?**

Continue onto the next page to choose which accounts to go after.

03

Account Prioritisation Worksheet

2 Identify high-impact accounts.

Based on the questions in the previous worksheet, set rules that determine high-impact accounts and go after those accounts first. For example, an account might be high-impact if it answers “yes” to all three initial questions with a highest possible deal amount above $10,000. Note those accounts below and prioritise them in upcoming quarters.

ACCOUNT NAME	CONTACT	TARGET PRODUCTS	HIGHEST POSSIBLE DEAL AMOUNT

3 Map high-impact accounts in your territory for easy visualisation.

Once you know your high-impact accounts, flagthem visually on a map. You can do this manually, or use Sales Cloud’s territory planning tool.

4 Create account plans for your top prospects.

Create account plans for how to penetrate individual customers and close those deals.

Learn how to do account planning with Quip, a sales collaboration tool.

04

Pitfall

It takes reps too long to get quotes approved.

Creating quotes and getting approvals takes up the most time of any other non-selling task in a rep's week, according to our Trends in Sales Ops report – time that could be spent building relationships and working on deals.

"Quoting should be easy," said Meredith Schmidt, Executive Vice President of Revenue Cloud at Salesforce. "But all of a sudden, you go to submit the quote for approval, and you need four different groups to approve the same special term for different reasons. So the deal slows down because of an outside business leader who's not in sales."

Solution

Speed up quoting by auditing the approval process and cutting redundancies. Get there in three steps:

1. **Use fewer approvers.** Identify where multiple approvers from similar functions can be replaced with just one. If reducing approvers isn't possible, see whether you can have different reviews run in parallel.
2. **Give approvers shorter deadlines.** Give your approvers shorter timeframes. For example, you might shorten an approval timeframe of two days to 24 hours.
3. **Automate more terms.** Find terms that get approved 100% of the time. Those should be replaced with auto-approvals so they don't need human intervention.

TOM HYDE
Head of APJ Sales and Success at Canva

> At Canva, we're making our pricing as transparent as possible so we can reduce friction in the buying process. We're building on this by giving sellers more data and insights so they can **add value at every customer interaction**.

04

Quote Approval Worksheet

Write out all the transaction types that require quote approval, along with the approvers needed. Then, identify rules for eliminating unnecessary approvals and set new timelines to speed up the approval process.

1 Identify all transaction types that need approval.

	TRANSACTION TYPE	APPROVERS	APPROVER'S DEPARTMENT OR JOB FUNCTION	CURRENT TIMELINE FOR APPROVALS
EXAMPLE	Renewal	Paul Leu	Legal	3 days
		Jeff Buwembo	Legal	3 days
		Val Gustav	Finance	3 days

Continue to the next page to find opportunities to remove redundant approvers.

04

Quote Approval Worksheet

2 Eliminate redundant approvers and speed up timelines.

Look at approvers from similar departments or job functions, and see if you can have one approver stand in for multiple approvers. When you eliminate an approver, you can still keep them in the loop by sharing transaction approvals as an FYI. Then, to speed up timelines, reach out to approvers and ask for their shortest possible approval window.

	TRANSACTION TYPE	APPROVERS	FORMER APPROVERS COPIED FOR VISIBILITY	NEW TIMELINE FOR APPROVALS
EXAMPLE	Renewal	Paul Leu (Legal)	Jeff Buwembo	1 day
		Val Gustav (Finance)		1 day

3 Auto-approve more terms.

Look for terms that get approved 100% of the time. Set those to auto-approve instead.

	TRANSACTION TYPE	TERMS TO AUTO-APPROVE
EXAMPLE	Renewal	If deal size > $10k then include professional services add-on

See how Revenue Cloud can automate approvals and speed up revenue.

05

Pitfall

Sellers need team support to close, but can't get alignment.

Eighty-one percent of sales reps say team selling helps them close. And yet roughly the same number of them (82%) say that aligning with other sellers is at least somewhat challenging.

Part of the challenge is overcoming the traditional competitive nature of sales in favour of collaboration. But successful alignment is also hampered by hybrid selling that creates multiple tracks and channels for team conversations.

Solution

Sales leaders told us that cross-functional alignment is the number one tactic for growth. Here's how sales ops can help break down silos across the organisation and make it easier to sell as a team:

1. **Train sellers to lean on team members as resources.** Ensure every rep has the resources and support they need to be an A-player and give them opportunities to build relationships across the organisation.
2. **Add "consult a team expert" step to your sales process.** The best resource to keep deals moving is the expertise inside your own organisation.
3. **Bring all your communication into one place.** Get out of communication silos like email, and use a collaboration tool that gives every team member – remote or in-office – visibility into deal progression.

ALYSSIA TENNANT
A/NZ Growth and Solutions Director at Simplus

"**Sales is not an individual sport, it's a team sport.** To scale up, ensure communication and focus is aligned across multiple internal business units. Don't just think of it as the sales process with salespeople; include your marketing and services teams and do away with silos."

05

How Salesforce does team selling.

We break down silos, so sales teams can collaborate on deals from anywhere.

1. **We pull in key people.** We make it the norm within our sales process to tap internal subject matter experts for immediate input. For example, we often ask for help to overcome an objection from a technical decision-maker, or we get an industry expert's review of a presentation.
2. **We host regular meetings for knowledge sharing.** We believe in meetings for coming together to share best practices. This happens across regular all-hands, fireside chats, and team-building exercises.
3. **We use Slack to create new channels for every account and opportunity.** Slack channels are forums where reps can track progress for every prospect and customer and help each other close. We do this for even the smallest deals.

Ready to sell better as a team?

Dive into the resources below.

Blog

Discover 3 new ways to speed up sales with a team approach.

Course

Learn sales team collaboration best practices.

Case study

Learn why brands like Canva are turning to Slack to help close sales deals.

Demo

Watch how Slack helps teams sell together.

06

Pitfall

Sales managers have limited time for coaching.

Only 26% of sales professionals receive one-on-one coaching at least weekly, according to our State of Sales report. That means managers likely have a lot to cover when they sit down with reps – probably too much to digest at one time.

More frequent coaching may seem like an easy solution, but a recent study found that managers have consistently spent 20% of their time coaching, year after year, for the past decade. This suggests that increasing coaching quantity might not be possible.

Make your coaching that much better.

Watch our fireside chat with sales leaders at Canva and Itoc to hear how they have more impactful conversations and boost seller productivity.

Watch the session

Solution

Make the most of your limited coaching by focusing on the most impactful areas to discuss. Here's how:

1. **Ask the seller to self-identify areas for improvement.** The seller knows better than anyone else what is and isn't going well. Ask sellers to write down issues they're facing throughout the week ahead of your one-on-ones.
2. **Connect the individual to the team vision.** Your coaching should ladder up to teamwide best practices and goals, so your sellers can row in the same direction.
3. **Coach first hand in the field.** "Prioritise coaching your people," says Tiffani Bova, Global Growth Evangelist at Salesforce. "Not just around using systems and tools – coach them in the skills they need to show up and be what your customers need. Skills like empathy, curiosity and communication. These are the skills sellers need to be successful in the field."

SIMONE THOMPSON
Head of Sales and Growth at Itoc

Never move a one-on-one meeting with your employees. These meetings are the cornerstone of an employee's development and they should always be intentional.

07

Pitfall

The team doesn't know if the enablement program is working.

Seventy-two percent of sellers do not expect to hit their quota in the coming year, according to our State of Sales report. Sales leaders are stepping in to help with more impactful training and enablement.

But unless you have a reliable way to measure the value of your sales enablement, "it's doomed to be a black box," said Jessica Holt Ware, Assistant Vice President of Sales at Salesforce. "Training goes in, but you're not sure what comes out."

Solution

To measure and show the impact of your sales enablement, start with the outcomes you want to achieve, and build training and milestones to get there. Here's how:

1. **Pinpoint the metric you want to improve.** Examples include ramp time, win rate, deal size, and sales cycle length.
2. **Deliver a program to match.** For example, if you want to increase the win rate (the percentage of deals you close), you might teach reps how to identify prospects with purchasing power.
3. **Track behaviour change.** In the example above, you would hope to see reps scheduling calls with contacts in the right roles.
4. **Adapt, learn, repeat.** Measure the revenue outcome and act from there.

07

How Salesforce does sales enablement.

Below we share the steps of our enablement program, refreshed last year.

1. **We define our revenue outcome.** Our current focus is on building a high-quality pipeline. We want a sales funnel full of qualified prospects who are likely to close.

2. **We create a new enablement track to change behaviour.** To ensure we're bringing in the best prospects, we teach our sellers the ins and outs of the audience and set milestones to make sure they're leading effective discovery and qualifying calls.

3. **We measure milestone completion.** We track milestones – like upcoming trainings and meetings to set – as they get completed. Then we adjust. For example, if discovery meetings are low, we update the milestone to drive an increase.

4. **We measure the impact on the goal early and often.** We measure the quality gain in our pipeline based on the increased likelihood that opportunities will close. We look at this metric within weeks of beginning the program and continue to monitor it so we can learn and adjust fast.

07

Enablement Worksheet

This worksheet will help you tie your enablement program to revenue goals, and prove that it's working.

1 **Define a measurable revenue goal.** ***Example:*** *Increase win rate from 10% to 15%.*

ENABLEMENT GOAL:

2 **Deliver an enablement program to get there.**

Identify the selling strategies and techniques that your reps will need to implement to reach their goal. Bring in new milestones and training to drive the new behaviour change.

Example: *Identify and speak with prospects who are authorised to make contract decisions.*

	MILESTONE	TRAINING AND CONTENT TO SUPPORT THAT MILESTONE
EXAMPLE	Book 20 meetings with people who have purchasing power.	Read material on how to identify appropriate roles in an org chart.

3 **Measure the success of the enablement program's impact on your revenue goal.**

As you run the program, track your goal metric to see if your enablement is moving the needle.

GOAL METRIC:

START:

END OF MONTH:

END OF QUARTER:

END OF HALF:

[See how Salesforce Enablement](#) helps reps achieve the right outcomes with targeted milestones and training.

08

Pitfall

Mental health issues hurt seller focus.

Sixty-three percent of salespeople said their performance was poor because of mental health issues, according to this 2022 survey conducted by an alliance of sales influencers. That means three in five sellers are struggling.

“As sales leaders, it’s important we understand and respect our employees’ boundaries – especially as technology blurs the boundaries between our work and personal lives,” says Frank Fillmann, CRO/ Country Leader Australia for Salesforce.

For example, says Frank, if you think of something important to share with an employee at 8 p.m., schedule your message so they receive it in the morning. If they see that message at night, they might feel obligated to jump on it right that moment.

“We need to adapt our processes and respect our people to preserve their mental health, so they can have balance and then crush it when they’re in the office.”

Solution

Sellers should track and talk about negative feelings, remove digital distractions, and seek professional help if they need it. Here are steps to take:

1. **Log feelings.** Keep a weekly log of personal wins and failures, and track how you feel at the end of the week. This allows you to spot and address trends of feeling defeated. It’s also a reality check to see if negative feelings are grounded in reality as opposed to thought-spiralling.
2. **Practise digital hygiene.** For example, use your do-not-disturb function on Slack so you’re not getting messages after you’ve left work for the day.
3. **Get professional help if you need it.** “Don’t struggle in silence,” said sales expert Ian Koniak. “Raise your hand and get help. Talk to a professional, talk to your company, and get support.”

TIFFANI BOVA
Global Growth Evangelist at Salesforce

“**Minimising your tech stack** will prevent your sales reps from feeling overwhelmed by too many tools demanding their attention.”

08

Take charge of your mental health.

Lean on the resources below.

Blog

Managing burnout and building resilience as a team.

Trailhead

Discover why mental health matters, with tips to improve.

Community Group

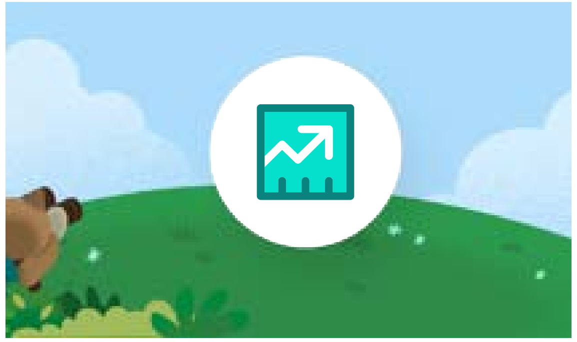
Trailblazer Community Cove: a virtual community gathering space.

More productivity and efficiency resources

Save Now, Grow Efficiently with Sales Cloud Unlimited

See a demo of how you can simplify your tech stack to boost sales efficiency.

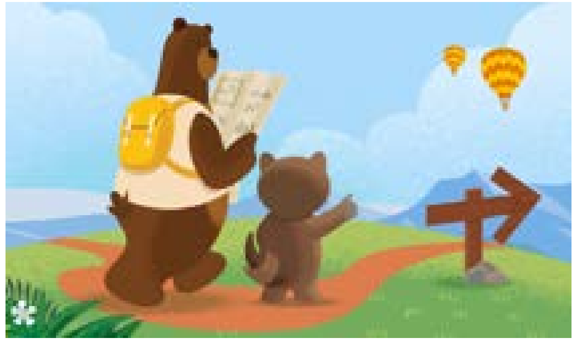
Learn More



Reduce Costs with Sales Cloud

Learn more about how our platform uses automation, data, and intelligence to save you money.

Learn More



A Leader in the Gartner® Magic Quadrant™ for Salesforce Automation Platforms

Salesforce has been named as leaders for the sixteenth straight year. Here's how to sell with real-time insights powered by automation.

Learn More