



# Time Management for Sales

---

**Selling with Confidence**

**Hire ❖ Develop ❖ Retain**

Component 1 | Calendar Assessment

Activity 1 | What does your task list look like?

Tasks I HAVE to do	Tasks I ACTUALLY do	Tasks I WANT to do

Activity 2 | What does your calendar look like?

<b>How do you run your week?</b> <i>Calendar, CRM, Task List</i>	
<b>In a typical week, is your calendar booked up or empty?</b>	
<b>Do you have "non-appointment" time scheduled out for other activities or is it blank?</b>	
<b>How much time are you dedicating to closing deal?</b>	
<b>Is there a day of the week that's traditionally busier than others? Is that by choice?</b>	
<b>Are days heavier in the morning or afternoon?</b>	
<b>Do you have breaks scheduled?</b>	
<b>Do you give yourself appropriate time to accomplish tasks/hold meetings/drive/prep?</b>	
<b>Do you book things close together or space them out?</b>	



Activity 3 | Calendar Analysis

Color Code Guide:

- Cold Calling = Yellow
- Appointments = Orange
- Closings = Red
- Admin Items/Driving/Prep = Green
- Internal Meetings = Blue
- Training/Development = Purple

Evaluation

<p><b>How much of your week was “booked”?</b></p>	<p>Yellow: Orange: Red: Green: Blue: Purple:</p>
<p><b>How much was on the calendar ahead of time? How much was “pop-up”?</b></p>	
<p><b>Was your time strategized?</b></p>	
<p><b>Did you dedicate too much time? Too little?</b></p>	

Action Items

- Color code calendar to understand where time is going
  - Identify an area you can minimize to reallocate time to a more beneficial task
- Set 15 minutes aside each day to “set up” next day
  - Remember: the most effective time spent is with a prospect



## Component 2 | Energy Management

### Activity 4 | Eisenhower Matrix

1   Crisis	2   Non-Negotiable
3   Progress	4   (Un)Necessary Evil

#### Action Items

- Align your week to do the most IMPORTANT tasks during your Einstein Window
- Notice things that interrupt or overtake your Einstein window
- Minimize the time spent on URGENT tasks

## Component 3 | Protecting Your Time

### Activity 5 | Distraction List

Anticipated Distractions	Unanticipated Distractions

#### Action Items

- Identify ways that you justify spending your time ineffectively
- When a distraction arises, categorize it using the Eisenhower Matrix
- Determine 3 accountability strategies you can use to keep yourself on track



## Component 4 | Creating a Process

### Common Time Management Systems

- Time Blocking or Smart Scheduling
- Automation
- Proactive Approach to Time and Learning

### Time Management Hacks

- Minimize Distraction
- Say No, Not Me, or Not Right Now
- Utilize the Tiny Times

### Action Items

- Know where your time is going, keep record of all that you do and how long it takes
- Set time management goals and keep them



**Corporate Membership**

**Compensation**

**Compliance**

**Background Screening**

**Recruiting & Talent Acquisition**

**HR Consulting**

**Training**

**Leadership Development**



**Missouri**

12851 Manchester Road  
Suite 150  
St. Louis, MO 63131

**Indiana**

450 E. 96th Street  
Suite 500  
Indianapolis, IN 46240

**Florida**

43 Skyline Drive  
Suite 1001  
Lake Mary, FL 32746

**Illinois**

300 Hamilton Blvd  
Suite L110  
Peoria, IL 61602