Mastering Technical Sales
2037 Trowbridge Drive
Newtown, PA 18940
Phone +1-215-431-1552
John@masteringtechnicalsales.com
www.masteringtechnicalsales.com
John Care, Managing Director

Times Up!

Why Activity Tracking Is Goodness

Bring together a group of Pre-Sales Engineers; add in a few beers, garnish with talk about RFPs or Proof of Concepts and the heated topic of activity or time tracking will come up. Activity tracking for Sales Engineers is a two-edged sword. In the right hands it can become a powerful competitive weapon both inside and outside the company. Used incorrectly it just becomes a weapon swung indiscriminately through the ranks of the pre-sales team.

In this article, I'll examine the good, the bad and the outcomes of activity tracking and will make the case that every Sales Engineering organization should account for its time. As opposed to five years ago, it is so much easier now. Many organizations just hook into an application like salesforce.com as the basic data entry method.

Some Bad Examples

1. I Want My Forty Hours! The purpose of activity tracking is NOT to make sure you are working for 40 hours a week – it is the job of your manager to ensure you are productively employed for the week. The purpose of time tracking should be to make sure those 40 hours are spent in the most efficient way *when combined with the activities of everyone else on the sales team*.

2. The Customer Facing Activity Club. I once worked for a VP of Sales who couldn't care less that his salesreps played golf twice a week, but would call me every week to complain because some poor SE had 59% customer-facing activity instead of 60%+. You behave in that manner, and everyone will have 60%+, no matter what they really did for the week.

3. **Minute By Minute.** Tracking systems are approximate – you shouldn't be recording down to the minute or even 1/10 hour. The closest hour or half-hour should suffice – you're not a lawyer billing for time.

4. **It's Just Not Fair.** It's true – the activity system isn't fair. A SE covering New York City, London or any major metropolitan area will be able to make more sales calls than an SE covering the US Rockies or half of Africa. That is why trends are way more important than absolutes and comparisons between geographically dissimilar groups are dangerous.

5. **Random Metrics.** When you decide to measure something, then you need a reason to conduct the measurement, and idea of what good/bad/ugly numbers are, plus some thoughts as to what you should do if a metric is out-of-band. For example – say you want a POC/trial conversion rate of 55-65% . Why? What if one quarter its 75%, or 35% ? What do you do?

6. **Why Doesn't Sales Do It?** That is life, get over it!

Some Good Examples

1. **The Reality Check.** Time tracking has helped me rescue several careers. Examining the hours worked, and where, helps identify (together with regular 1-on-1's) cases of overwork, burnout or checkout.

2. **History Lessons.** The system can be a great friend at review time, or even before a quarterly sales meeting. Keep track, at least at a summary level, of your entries for the year – so that you can lay out every deal you worked on, all the other groups you helped out, partner and trade show activities etc. If you put all the data in, you may as well get something worthwhile out of the system.

3. **Groups And Trends.** Activity trends for a group can be a leading indicator for issues – both good and bad. For example, if the activity levels of an overlay group are declining, then it's a good candidate to be mainstreamed next year. If activity levels of a geography are increasing, or demos are increasing and discovery is decreasing, then there is a reason for that – go find it.

4. **Inspecting Sales.** Most sales leaders are interested in which reps consume the most SE time, which reps set up the most trials or which reps close the highest

percentage of POCs. The data is also a great way to push back on sales and sales management when they complain about resource allocation.

5. Headcount Allocation. Using utilization and capacity numbers to determine where to place the next open headcount is a great way to show confidence in the system and get first-level manager buy-in.

How To Achieve Positive Outcomes

1. Communicate Success. To avoid the Big Brother complex it is important that pre-sales executive management communicate back down to the individuals the uses being made of the data. How exactly does it better the life of the average pre-sales engineer? If this doesn't happen don't bother reading the rest of the article!

2. Don't Contemplate Your Navel. Although pre-sales time and activity metrics are a great guide to operational efficiency – they are far more effective when used outwardly. Most other departments cannot compete with the quality of data and insights from activity tracking. I used to love turning up to quarterly business reviews and being able to use data rather than emotion to force a decision.

3. Push On Support and Services. Tracking what I used to call "noise" yields a number of benefits. Specifically if you examine the amount of time spent on post-sales activities such as customer support. For most pre-sales organizations this should be in the low single digits – if it isn't you can push back on support to do their job as you (or your team) shouldn't be getting those customer calls.

4. Justify Increased Headcount. It is so much easier to justify headcount when you can show that your team has been running at 100%+ for the past four months. When you can then back that up with where they have been and what they are doing you are a step ahead of everyone else fighting for budget.

5. Power Statistics. With a little imagination, you can look at all kinds of numbers and ratios. For example – the ratio of discovery hours to demo hours, or the ratio of demo prep hours to demo hours etc. The absolute numbers don't tell you much, but changes in them from month to month can – especially before and after the release of a new product, upgrade or service.

Summary

One of my favorite statements about pre-sales is that we are *the organization of last resort* within a company. When a demo, competitive information, partner training or customer support is not acceptable – it is usually pre-sales who fixes it. Activity tracking shows how much time is lost because of inefficiencies in the system. When the demo always needs customization, then that shows up in excessive demo preparation time. If field marketing is cutting down on travel expenses and leaning on you to staff trade shows – that shows up in the numbers. When you have a sales department who has never met an RFP they didn't want to respond to – that shows up in the numbers.

My case for activity tracking is this. It is a complex tool for effecting positive change, not a hammer for punishing individuals – so sales and pre-sales executives need to be trained how to use the tool as a true craftsman would.

"The only reason for time is so that everything doesn't happen at once."

Albert Einstein, physicist.