

This is a critical first step to understanding how your organization currently functions. Please make copies of this form for distribution to your team. Please direct each member of your company to complete one Time & Task Analysis Form per day for the next five business days.

It is important that they record each *category* of task performed, not each individual task itself. For instance, if a member of your team spends the first half-hour of a day on administrative tasks, it is appropriate to note this as "administration." It is not necessary to write down each individual administrative task completed during that half-hour.

During the next five days, your team should make a practice of pausing every 15 minutes to record the type of work they have completed in the preceding 15 minutes. If a task extends through multiple 15-minute increments, it is sufficient to draw a line through the entire time taken and record a single entry for the task.

Please read the following definitions carefully. In order to have accurate analysis, it is important that you categorize your time using the definitions below:

Administration. Administration is the time you spend working on administrative, operational, or financial issues that impact you, your customers, and your clients. This is business time, but the work you are doing does not contribute directly to incremental revenue.

Examples of administrative tasks include working on a customer's billing, being involved in shipping products, arranging for your service provider to meet with a new client, attending a business operations meeting, calculating financial records for yourself (commissions, expenses, bonuses, etc.) or a customer/client.

Pre-Sales. Pre-sales time is the time you spend getting ready for a sales call. Pre-sales tasks may include conducting research, preparing a proposal or presentation, meeting with members of your team to plan the next step with a customer, or any other activity that prepares you for your next sales event with customers, prospects, etc. This is time you spend getting ready to sell.

Prospecting. Prospecting is the time you spend engaged in activities designed to introduce you and your company to a new sales opportunities. When you prospect, you are investing your time to proactively introduce yourself and your company's message to a group of strangers. These organizations are ones that you suspect may be able to buy products or services like those you sell.

We understand that prospecting, or business development, is a critical component of selling. However, for purposes of this analysis, please separate the time you spend prospecting from the time you spend selling. The selling section below describes selling time in detail. Unlike prospecting, sales time is the time you spend with people you *know* have a need to buy products or services like those you offer. Furthermore, you are spending that time with an individual or group of individuals who have an understanding of your purpose and are meeting with you face-to-face or by phone to review your offerings.

Selling. Selling time is any time you spend face-to-face or on the phone with a customer or prospect. Please be careful to record only the actual selling time. Do not include the time it takes for you to travel to a prospect location. This will be accounted for elsewhere. During selling time, you are actively pursuing incremental revenue from existing or prospective accounts.

Travel & Waiting. As the name implies, this category covers the time you spend getting to a customer or prospect location and waiting for your appointment. Regardless of the mode of transportation, we would like to know how much time you spend travelling to a customer location and upon arrival, how much time you spend waiting before actually meeting the contact and starting your sales time.

Customer Service. This is the time you spend with a customer facilitating the relationship you have already started. Activities in this category include helping a customer understand your company's products or services, assisting a customer facilitate resolution of a problem, etc. During customer service time, you are not selling. Without appropriate quantitative and qualitative levels of customer service, however, you run the risk of losing the relationship between you and your customer.

TIME & TASK ANALYSIS

Date: _____

Company: _____

Name: _____

Title: _____

Hour	Activity
8:00	_____
8:15	_____
8:30	_____
8:45	_____
9:00	_____
9:15	_____
9:30	_____
9:45	_____
10:00	_____
10:15	_____
10:30	_____
10:45	_____
11:00	_____
11:15	_____
11:30	_____
11:45	_____
Noon	_____
12:15	_____
12:30	_____
12:45	_____
1:00	_____
1:15	_____
1:30	_____
1:45	_____
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3:00	_____
3:15	_____
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3:45	_____
4:00	_____
4:15	_____
4:30	_____
4:45	_____