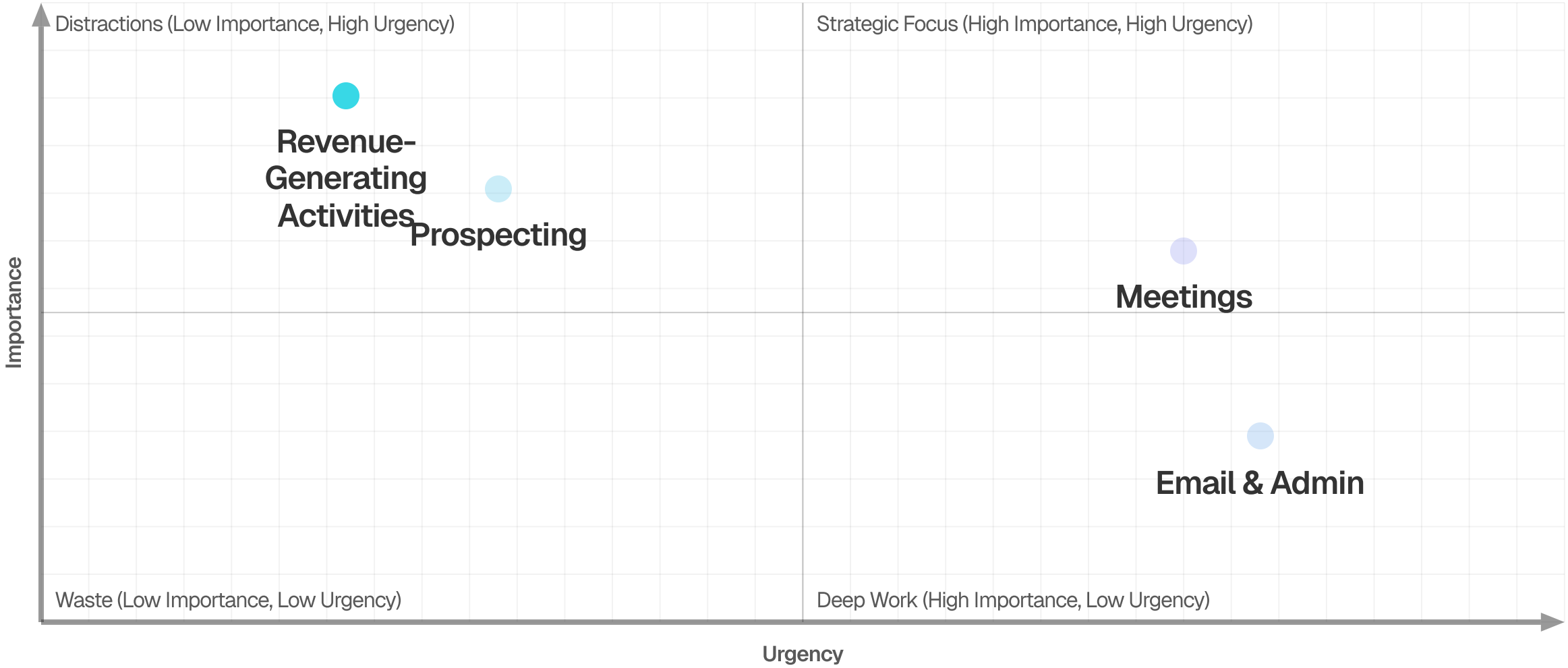


Mastering Professional Discipline & Productivity

Building the habits for sales success

Time Management & Daily Planning

Prioritizing high-impact activities using the Eisenhower Matrix



CRM Discipline & Process Workflows

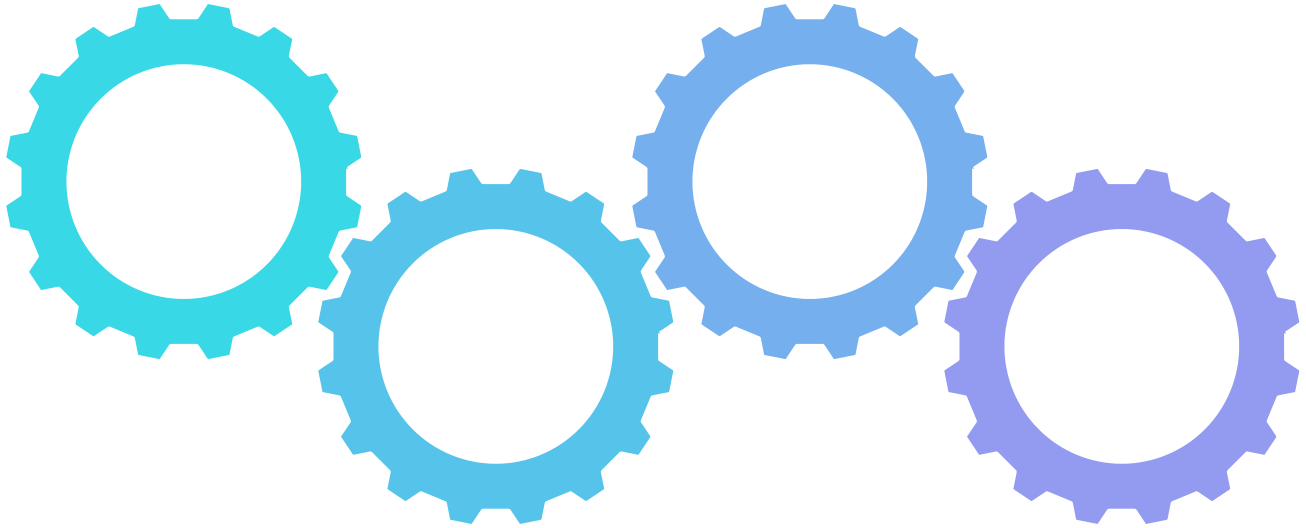
If it isn't in the CRM, it didn't happen

Log Interactions

Capture all calls, emails, and meetings in real-time.

Set Next Steps

Every lead requires a future-dated follow-up task.



Update Deal Stages

Ensure status reflects the actual buyer's journey stage.

Execute Lead-to-Deal

Follow the sequence: Qualification → Discovery → Demo → Proposal → Negotiation → Closed.

Consistent CRM adherence is the foundation of accurate sales reporting and team alignment.

Target Tracking & Performance Metrics

Measuring what matters to hit your quota

Metric Category	Key KPIs	Description
Activities	Dials, Emails, Meetings	Volume of outreach and engagement
Conversion	Lead-to-Opp, Opp-to-Close	Efficiency ratios at each funnel stage
Pipeline	Total Value ($)	Sum of all active deal opportunities

Weekly Tracking Cadence: Progress measured every Friday against monthly/quarterly goals with a target goal achievement percentage.

Professional Communication Etiquette

Email, WhatsApp, and Meeting Discipline

Channel	Professional Standard	Best Practices
Email	Formal & Structured	Clear subject lines; Professional greetings; 24h response window
WhatsApp	Business-First	Use during business hours; Avoid emojis initially; Limit to urgent matters
Meetings	Goal-Oriented	Agenda sent 24h prior; Start on time; Recap & Next Steps sent within 60m

Respecting communication boundaries and maintaining structure enhances team efficiency and individual productivity.

Follow-up Management: The Path to Conversion

Persistence as a professional skill



Step 1

The Rule of 7

Engage prospects through 7+ touchpoints instead of stopping after one attempt.



Step 2

Cadence Strategy

Rotate channels like Phone, Email, LinkedIn, and WhatsApp to stay relevant.



Step 3

Systematic Reminders

Utilize CRM automation to ensure no leads fall through the cracks.

Remember: The fortune is in the follow-up.

Personal Learning & Development

Becoming a lifelong student of sales



Industry Intelligence

Dedicate 30 minutes weekly to reading your industry's news and competitor updates.



Self-Auditing

Record your calls and listen to them. Identify three things you did well and one area for improvement.



Feedback Loops

Proactively ask your manager for specific feedback after every major presentation or sales call.

Your Path to Productivity

Key takeaways for your first 90 days



- **Plan**

  Use the 1-3-5 rule to own your day and prioritize effectively.

- **Systematize**

  Treat your CRM as your personal assistant; if it isn't documented, it doesn't exist.

- **Execute**

  Follow your activity metrics and maintain a consistent, multi-channel follow-up cadence.

- **Improve**

  Commit to continuous learning and self-auditing to shorten your feedback loop.