Identify Productivity Roadblocks: Conduct A Sales Activity Study

Today’s B2B salespeople are juggling many competing priorities and struggling to stay abreast of constant changes in offerings, their customer, and the marketplace. In fact, companies spend millions on the latest technology and training to promote and enable sales productivity.

Forrester has conducted hundreds of sales activity studies with organizations to provide a complete view of where reps are spending their time and why. By focusing on what various sales roles are doing as individuals, and the ways in which they are collectively supported, organizations can use these insights to identify productivity roadblocks, highlight what highly productive sales reps are doing, and replicate those activities across the sales organization.

What Is A Sales Activity Study?
The focus of a sales activity study is to identify barriers that affect increased sales productivity. Analysis of the results identifies actions and initiatives that sales organizations can pursue to reduce the time sales reps spend on low-productivity activities and shift that time to higher-productivity activities.

Sales activities are classified into the following four main quadrants of the Forrester Sales Productivity Benchmark:

- **Core selling activities — direct engagement.** These activities initiate a sales opportunity or accelerate an opportunity toward closure. The rep directly engages a buyer through email, the telephone, web, social, or face-to-face interaction.

- **Core selling activities — internal.** These activities initiate a sales opportunity or accelerate an opportunity toward closure but are performed behind the scenes. Examples include research, call preparation, and writing proposals.

- **Non-core selling activities — direct engagement.** Reps sometimes directly engage with buyers without selling or seeking to advance an opportunity. Examples include customer service calls and professional visits without a sales agenda (e.g., a golf outing with a customer).

- **Non-core selling activities — internal.** Sales organizations must minimize these time-draining activities, which include writing expense reports, calculating commissions, reading administrative emails, and fixing technology issues.

**Study Deployment**
Deploying a sales activity study is easy with Forrester’s field-tested methodology. Once you’ve gained internal buy-in, your team will determine who from sales will participate in this study and provide us with a distribution list. We will send the survey or alternatively can provide you with a templated invitation to send. Your sales organization will track their activity at quarter-hour intervals and plug it into the interface at their convenience. Select questions may be customized to provide additional granularity. The study is generally in-field for two weeks.

**Analyzing The Findings**
Once the data on various activities has been collected, we will analyze the percentage of time spent on each and then look for ways to increase efficiencies — with a readout delivered within 7–10 days following the close of the survey. By utilizing the Sales Productivity Benchmark, organizations can partner with Forrester to define activities as core or non-core selling and direct or internal engagement with buyers and/or customers. In addition, your metrics will be compared against a peer set of organizations to provide perspective.
Sample Output
The data you need to drive increased productivity can be seen in the example below.

**Forrester Sales Productivity Benchmark**

### Core Selling Activities
- **Streamline**
  - Research
  - Proposals
- **Maximize**
  - Prospecting
  - Sales Calls

### Non-Core Activities
- **Minimize**
  - Expense Reports
  - Travel
- **Leverage/Delegate**
  - Customer Service Calls

### Commitment To Take Action
As a follow-up to the readout, it’s important that organizations are committed to take action on the results. This includes ensuring that resources are available or may become available for productivity enhancement initiatives. Our analysts will provide you with recommendations and actionable next steps to make progress on the improvement areas.

For example, a sales activity study might seek to delegate activities that hinder efficient prospecting (e.g., pricing requests to a support team), identify processes and practices that increase productivity (e.g., consistency in how and when prospecting calls are conducted), and determine whether web-based content can be used to quickly engage prospects.

### Get In Touch
Sales activity studies are an exclusive tool available within Forrester Decisions for B2B Sales Executives. Please contact us to learn more about these studies and how we can help your organization drive increased sales productivity.