# Eisenhower Matrix for Sales Representatives

Pipeline Clarity in 4 Quadrants

For guidance and digital tool, visit: https://www.eisenhowermatrix.com/templates/eisenhower-matrix-for-sales-representatives/

|  |  |
| --- | --- |
| **Do First**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | **Plan**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Delegate**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | **Review**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

# How to Use This Matrix in Sales

This isn't about being busy - it's about being profitable. Use it to focus on revenue-generating activities and eliminate the rest.

# The Sales Rep's Quick Sort

1. Will this close revenue THIS month?
2. Does this move a deal forward or build pipeline?
3. Can someone else or something else handle this?

# Remember

• Your time is literally money
• Busy doesn't equal productive
• Every 'yes' to low-value work is a 'no' to commission
• The best salespeople say no more than yes
• Relationships > Transactions

# The Sales Rep's 3-Question Filter

Cut through the noise with these revenue-focused questions:

## Question 1: Will this directly impact my quota THIS month?

**If YES:** It's URGENT → Continue to Q2

**If NO:** It's NOT URGENT → Continue to Q2

## Question 2: Does this move a deal forward or build pipeline?

**If YES:** It's IMPORTANT → Place based on urgency

**If NO:** It's NOT IMPORTANT → Place based on urgency

## Question 3: Can SDRs, marketing, or automation handle this?

**If YES:** Consider DELEGATING (especially if in Q3)

**If NO:** You need to handle it personally

# Common Sales-representatives Traps to Avoid

## The Everything's Urgent Trap

Treating every prospect request as urgent because 'they might buy!'

**Solution:** Use the revenue timeline test. If it won't close this month, it's not urgent. Important maybe, but not urgent.

## The Activity Metrics Trap

Focusing on call count and email volume instead of quality conversations.

**Solution:** Track leading indicators that matter: meaningful conversations, qualified opportunities, and pipeline velocity.

## The Shiny Logo Syndrome

Dropping everything when a big company shows minimal interest.

**Solution:** Big logos must meet the same criteria. A Fortune 500 tire kicker is still a tire kicker.

## The Admin Avalanche

Spending prime selling hours on CRM updates and internal reports.

**Solution:** Batch admin work to low-energy times. Protect 9-11 AM and 2-4 PM for actual selling.

# Your Daily Sales Success Routine

10 minutes of planning = 2 hours of productive selling

## Morning (5 minutes)

1. Review today's must-close deals (Q1)

2. Check calendar for scheduled Q2 activities

3. List all new leads and requests

4. Sort using the 3-question system

5. Block time for highest-revenue tasks

## Afternoon (5 minutes)

1. Update CRM with today's progress

2. Move incomplete Q1 items to tomorrow

3. Schedule tomorrow's Q2 activities

4. Celebrate wins (seriously, do this!)

5. Set phone to 'off' - you've earned it