

Your Sales Command Center

Pipeline Clarity in 4 Quadrants



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

Examples for Each Quadrant

Deal Closers (Do Now)

Revenue-generating activities with hard deadlines

- **Proposal due today for \$100k deal** - Direct impact on this month's quota
- **Contract expiring - renewal at risk** - Losing existing revenue is worse than missing new
- **Hot lead wants pricing NOW** - Strike while the iron is hot
- **Quarter-end deal needs VP approval** - Miss today, wait 90 days
- **Major client escalation** - Protect the base before hunting new

Pipeline Builders (Schedule It)

Activities that create future revenue

- **Research and map key accounts** - Strategic selling beats spray and pray
- **Build relationships with decision makers** - Trust closes deals, not features
- **Create custom demo for target vertical** - Preparation separates pros from order-takers
- **Develop champion at strategic account** - Internal advocates win enterprise deals
- **Learn new product features deeply** - Product knowledge builds credibility

Delegate Zone (Get Help)

Urgent tasks that don't require your expertise

- **Update 50 records in CRM** - Sales ops or admin can handle
- **Schedule meetings across time zones** - Use scheduling tools or assistant
- **Send routine follow-up emails** - Create templates and sequences
- **Pull standard reports** - Automate or delegate to analyst
- **Attend non-essential internal meetings** - Get notes from a colleague

Time Wasters (Delete)

Activities that feel like work but don't drive revenue

- **Pursuing dead deals out of pride** - Sunk cost fallacy costs commission
- **Perfecting email signatures** - No one ever bought because of formatting
- **Endless research without outreach** - Analysis paralysis doesn't close deals
- **Attending every product webinar** - Learn what you need, when you need it
- **Reorganizing your pipeline views** - Procrastination disguised as productivity

Common Teacher 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

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