THE SALES ADMIN AUDIT CHECKLIST

Where is your team's selling time actually going?

Most teams can't say how much time admin costs them, because it's scattered across small tasks rather than one obvious block. Work through this checklist with your team, or have each rep do it solo, to find out where the hours are really going.

Part 1: Where does the time go?

- [ ] I know roughly how many hours per week I spend updating CRM records or spreadsheets
- [ ] I know roughly how many hours per week I spend writing follow-up emails from scratch
- [ ] I know roughly how many hours per week I spend searching for information across different tools
- [ ] I've logged a call or deal update more than once, in more than one place, in the last week
- [ ] I've missed or delayed a follow-up because I forgot to set a reminder

Part 2: Where does it break down?

- [ ] Our team tracks deals in more than one place (CRM, spreadsheet, inbox, notes app)
- [ ] Every rep on our team does admin slightly differently
- [ ] If a rep left tomorrow, their account notes and context would leave with them
- [ ] Our manager has to manually chase updates to build a pipeline report
- [ ] We've lost a deal, or a lead's gone cold, because a follow-up slipped through

Part 3: What would change if this were automated?

- [ ] I could describe what a rep's week would look like with call logging done automatically
- [ ] I know what our team would do with an extra 3-5 hours per rep per week
- [ ] I've thought about what "one shared view" of every deal would actually solve for us
- [ ] I know what it's costing us, in deals or revenue, to keep doing this manually

Part 4: The team-wide rollup (for managers)

Once each rep has worked through parts 1-3 on their own, bring the answers together to see the real size of the problem.

- [ ] I've collected estimated admin hours per week from every rep on the team, not just the ones who complained loudest
- [ ] I've added those hours up across the whole team, not just looked at them one by one
- [ ] I can see whether the admin burden is spread evenly, or concentrated on a few reps
- [ ] I know how many total selling hours per week the team would get back if admin were automated
- [ ] I've compared that number to what it would cost to hire another rep, versus fixing the process

Scoring

Mostly unchecked in part 1: You don't have visibility into where time goes yet. That's normal, and it's the first thing to fix.

Several checks in part 2: Your admin problem is structural, not personal. No amount of individual effort fixes a tool problem.

Checks across part 3: You already know what's possible. The gap is implementation, not awareness.

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