Time Well Spent:

Training Reps to Capture Better Data & *Work Smarter*

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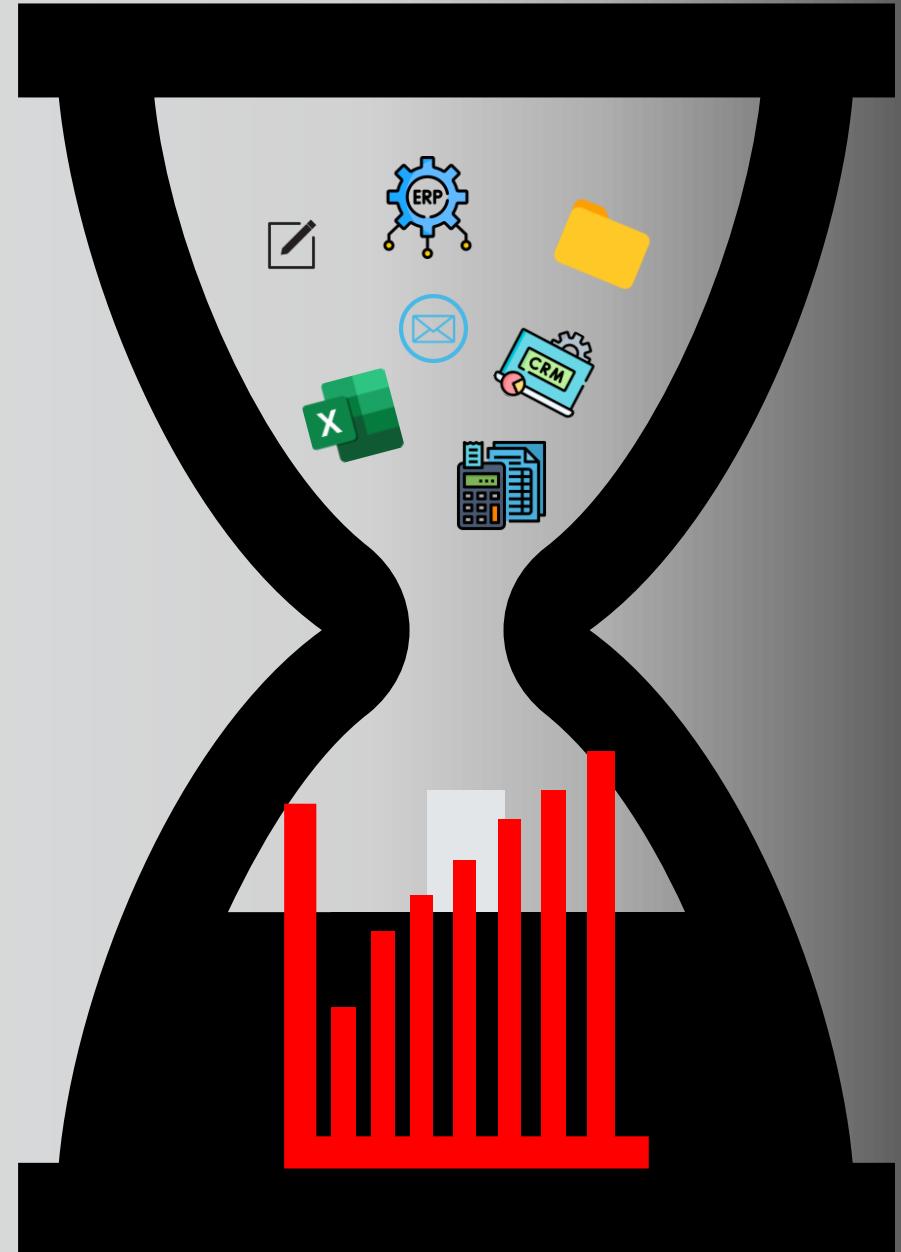
Agenda

- Welcome & Introductions
- The Rep Firm Tech Landscape
- Strategy Before Software
- The Cost of Bad Data
- Data Entry Discipline
- Training by Persona
- Dashboard Reality Check
- Q&A

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Introductions

Timothy Blake
CEO & Founder of BBB Techs

Stephen Turner
CEO & Founder of Turner Time Management

BBB Techs

Innovation Through Technology and Training

Focused on helping companies implement technology effectively

Strong partnerships with industry leaders like **TTM** and **Microsoft**

Supporting **20+** Rep Agencies across North America

Helping teams connect CRM's, quoting tools, and reporting for unified insights

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Steven Turner – Background & Credentials

Founder of Turner Time Management | Executive Coach | Microsoft 365 Strategist

Career Highlights

Former EVP, Clover Imaging Group - Manufacturer/distributor of private-brand ink & toner cartridges and recycling solutions. **Hired 7 firms (86 reps)** – to grow U.S. & Canadian sales presence

Founded TurnerTime in 2006 – After a customer's question — "Did you get my email?" — sparked a realization about how technology shapes productivity, Stephen founded TurnerTime℠ to help professionals work smarter. Since then, he's trained over **10,000 people across 300+ companies** in manufacturing, finance, and sales, focusing on Microsoft 365, Google Workspace, and Apple tools.

Certifications & Recognitions-
- **Certified CPMR Instructor**, Manufacturers' Educational Research Foundation (since 2018)
- **2024 CREA Global Award Honoree**, Brainz Magazine
- **Top Executive Coach 2025 (#2 Midwest)** – *Real Leaders Magazine*

The Rep Firm Tech Landscape

Purpose - Central hub for tracking customer interactions, opportunities, and follow-ups.

Used by - Sales reps, inside sales, and leadership.

Common Tools –
- Repfabric
- REV
- HubSpot CRM
- Microsoft Dynamics 365
- Salesforce

Rep Firm Operations

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Purpose - Generate, send, and track quotes; often connects to pricing or ERP data.

Used by - Inside sales, customer service, and reps

Common Tools –
- AutoQuotes
- Specifi
- IQ Quote / CPQ systems
- Repfabric Quote Manager
- Excel / Word Templates

Rep Firm Operations
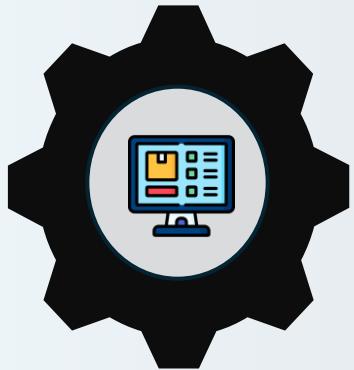
Purpose - Track product availability, sample stock, and consigned or regional inventory. Helps reps know what's on hand, what's shipping, and where orders are in the fulfillment process.

Used by - Operations, inside sales, logistics coordinators, and manufacturer liaisons.

Common Tools –
- Microsoft Dynamics 365
- NetSuite WMS
- Fishbowl Inventory

Rep Firm Operations

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Purpose - Custom tracking for commissions, manufacturer data, and exceptions.

Used by - Sales support, operations, and analysts.

Common Tools –
- Microsoft Excel
- Google Sheets
- Airtable
- Smartsheets
- Repfabric commissions module
- RPMS

Rep Firm Operations

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Purpose - Email, chat, meetings, and shared files that support daily coordination.

Used by - Everyone across the firm..

Common Tools –
- Microsoft 365 (Outlook, Teams, SharePoint)
- Google Workspace (Gmail, Drive, Meet)
- Slack
- Zoom

Rep Firm Operations

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Purpose - Turn CRM, ERP, and quoting data into actionable insights.

Used by - Leadership, manufacturers, and sales managers.

Common Tools –
- Microsoft Power BI
- Tableau
- Excel

Rep Firm Operations

Purpose - Tracks inventory, pricing, orders, and commission data from manufacturers.

Used by - Accounting, operations, and leadership.

Common Tools –
- Business Central
- Acumatica
- QuickBooks Enterprise
- NetSuite
- Infor / Epicor

Rep Firm Operations

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Rep Agency A vs Rep Agency B:
The Power of Good Data

Rep Agency A *(Bad Data)*   **Rep Agency B** *(Good Data)*

	Rep Agency A (Bad Data)	Rep Agency B (Good Data)
Data Capture & Entry	Notes scattered in emails or spreadsheets. Data entered inconsistently or late	Notes logged directly in CRM or Teams; standardized entry after every call or visit.
System Integration	CRM, quoting, and ERP don't talk — data lives in silos.	Connected systems; quoting, ERP, and CRM sync automatically.
Reporting & Visibility	Reports rebuilt manually; numbers often don't match principal data.	Power BI dashboards update automatically; accurate reports sent proactively.
Time & Productivity	5+ hours per week lost reconciling data or finding info.	Reps spend time selling, not searching; managers review insights instead of errors.

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Strategy Before Software

Capture
Raw Inputs (i.e., notes, emails, quotes)

Structure
Entered in CRM, ERP, etc.

Analyze
Connect

Act
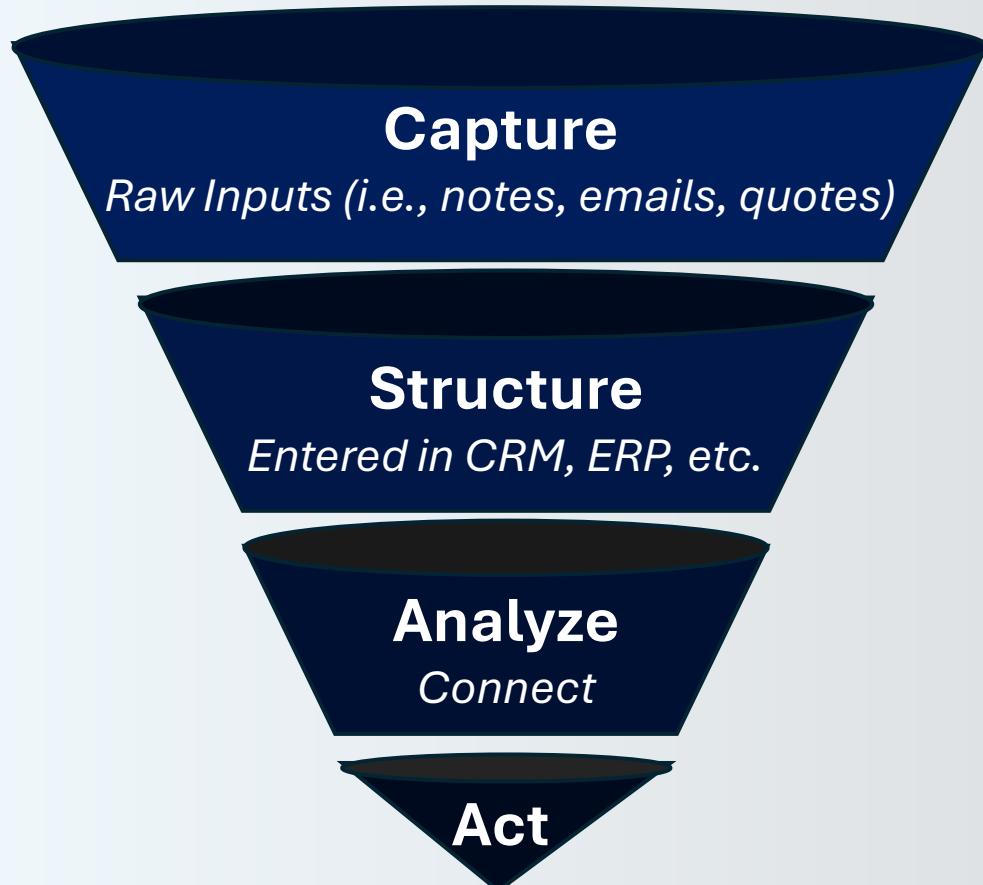
Readiness Steps

☑ **Clarify Your Goals -** What business questions do you need to answer? (e.g., "Which lines are most profitable?" "Where are we losing quotes?")

☑ **Define Your Data Sources -** What information already exists — and in what form? Where is it duplicated or missing?

☑ **Select & Sequence Tools -** Identify which systems are essential first (CRM → quoting → ERP → BI). Don't implement everything at once — build toward connected data.

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The Cost of Bad Data

Lost Time
Reps spend hours chasing information that should already exist — digging through emails, verifying quotes, or fixing spreadsheets instead of selling.

Inaccurate Reporting
When CRM or spreadsheet data is incomplete, reports don't tell the truth — leading to missed trends, wrong forecasts, and confusion with principals.

Missed Opportunities
Bad data hides real opportunities. A lead that isn't logged, an inactive quote that never follows up, or a customer that slips through because the account owner wasn't updated.

Lost Credibility
When reports don't match manufacturer numbers, it erodes trust. Principals begin to question your data, your processes, and sometimes even your performance.

Revenue Impact
Inconsistent or missing data affects commissions, forecasting accuracy, and customer retention — directly hitting your bottom line.

*Poor data quality costs companies an average of **15 – 25 %** of their annual revenue.* [1]

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(1) The Data Administration Newsletter (TDAN, 2024)

Why Tech Implementations Fail
(and How to Get it Right)

Common Pitfalls

No Clear Business Goal - Teams adopt new software because "everyone has one" instead of tying it to measurable outcomes.

Lack of Leadership Alignment - Different leaders have different expectations — CRM for sales tracking vs. reporting vs. quoting.

Weak Data Foundation - Trying to automate bad data only amplifies chaos.

Underestimating Change Management - Assuming "the team will just use it."

Overcomplicating the Stack - Too many disconnected tools, too soon.

What to Do Instead

Start with "Why" - Define what success looks like (e.g., "Reduce time spent on quotes by 30%" or "Increase CRM adoption to 90%").

Align Early - Agree on shared definitions of success and roles before rollout.

Clean & Standardize First - Review where data lives, what's duplicated, and set input rules before migrating.

Train & Reinforce- Plan onboarding, hands-on workshops, and consistent follow-ups. Celebrate early wins.

Phase It In - Implement one layer at a time, starting with the system of record (CRM or ERP).

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Upskilling Your Sales Support Team

New data and process support roles designed to improve accuracy, save time, and strengthen reporting across the sales cycle.

Today

Sales reps enter inconsistent or incomplete data

CRM fields and reports are updated manually

Reports built reactively by leadership

Lost hours spent reconciling spreadsheets

**Focused on "keeping the system updated"**

With Upskilling / New Roles

Dedicated staff manage clean, standardized data intake

Automated workflows ensure accuracy and consistency

Continuous, proactive reporting from embedded data specialists

Faster insights, reduced reporting time

Focused on "making the system smarter"

Data Intake · Validation · Process Execution · Reporting · Insight
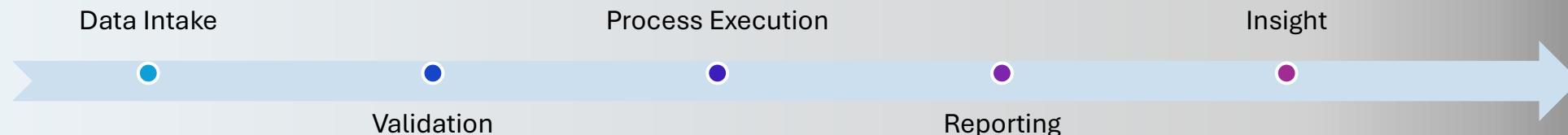
Before You Think Data....Think Process

1. **Does your CRM guide sales professionals through the sales process?**

2. **Is that process consistent – or does it vary by manufacturer or dealer?**

3. **Does your CRM help new sales professionals ramp up quickly?**

Lead → Qualify → Quote → Close → Report

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TIME.

Better data input equals better data results.

The 7 Silos Save Time: Microsoft 365

Calendar
Outlook

For ALL Business Related and Time Specific Meetings, Appointments and Tasks

Email
Outlook

For ALL Business-Related eMail

CRM
Repfabric

ALL Activity For ALL Customer Prospect & Leads

Notes
OneNote

For ALL Business-Related Notes *Handwritten Notes added with Rocketbook*

Tasks
Microsoft To-Do/ Planner

For ALL non-time specific Tasks & Projects

Files
OneDrive/ SharePoint

For managing all your files, documents and your PC Desktop

Teamwork
Microsoft Teams

The HUB for all information related to specific customers and projects AND Video Webinar and Audio Conferencing

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Gemini
The 7 Silos Save Time: Google Workspace

Calendar
Google

For ALL Business Related and Time Specific Meetings, Appointments and Tasks

Email
Gmail

For ALL Business-Related and Time Specific Meetings, Appointments and Tasks

CRM
Repfabric

ALL Activity For ALL Customer Prospect & Leads

Notes
Google Keep

For ALL Business-Related Notes *Handwritten Notes added with Rocketbook*

Tasks
By Google

For ALL non-time specific Tasks & Projects

Files
Google Drive

For managing all your files, documents and your PC Desktop

Teamwork
Google Meet

Secure video meetings for teams and businesses

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Enhance. Refine. Improve. Optimize.

Use Outlook, Microsoft 365, and your mobile device more efficiently — **achieve more success with less stress.**
Make your work your practice.

Continuous Improvement Model

It's CIMple

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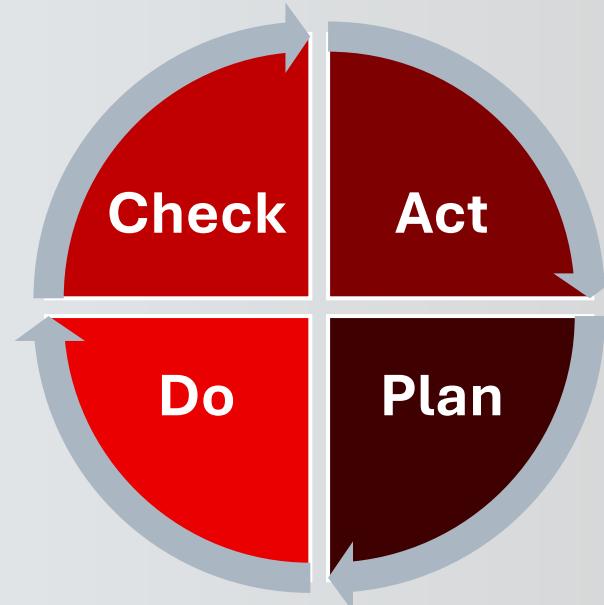
Strategies + 60 Second Habits =

SUCCESS

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60 Second Habits:
Examples You Can Put Into Action Today

- Link **Apple Notes** to **Outlook** (*or Google Keep to Gmail*)

- Use **Right Click / Double Left Click or Long Press** to avoid distractions

- Convert Emails to **meetings with one click**

- Find any **email or file in under a minute by using multiple criteria**

- Create email folders by **Action Type**, not just Subject

- Practice the "**Onto the next one**" email strategy

- Share your **availability electronically**

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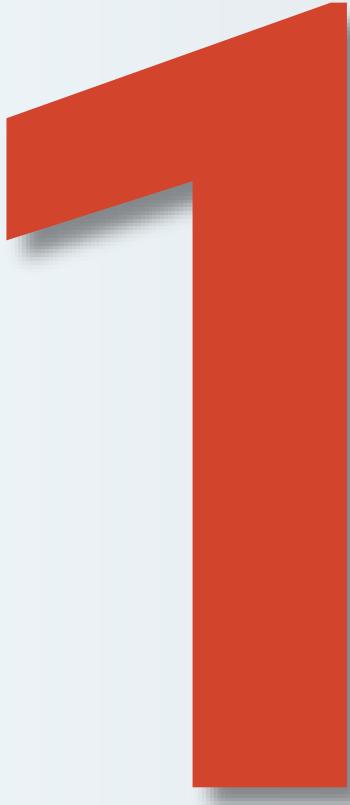
Address the challenges of technology-driven *'information overload'* by incorporating additional training or coaching.

This will **empower** better management of email, priorities, and time, facilitating a transition from a reactive to a proactive mode while combating information overload

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2

Enhance the essential skill for the 21st century by learning to become more 'indistractable,' as advocated by Nir Eyal, Instructor at Stanford's Graduate School of Business.

A study by Gloria Mark at the University of California revealed that 44% of interruptions are self-generated. Maintaining focus is crucial; otherwise, distractions and interruptions can dominate your day.

3

Optimize daily efficiency by investing **15-30** minutes at the beginning or end of each business day to manage emails, action items, projects, and schedule dedicated time for their completion.

Embrace 'The Daily Wrap' to stay organized and save valuable time—remember, *15 minutes of planning can save up to an hour of work.*
(15 SAVES 60)

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STRATEGY RULE #1

Anything you do repeatedly for your business, deserves a process.

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Keys to Managing Your Technology:
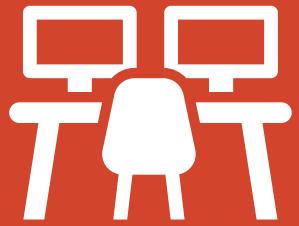
Create an Efficient Electronic <u>and</u> Physical Workspace
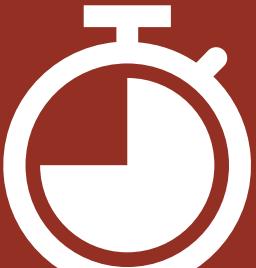
Streamline The Way You Do Things and Increase Efficiency...

**...No Matter Where You Are Working From**

Strategy
Examples You Can Put Into Action Today

- Use an electronic note taking system to consolidate all notes
- 100% synch your computer apps with your smartphone/tablet
- Manage your calendar for the day first not your email
- Set up your email and file folder logic with a clean sheet of paper
- Manage your Inbox to less than 35 emails, get organized
- Leverage Microsoft Booking or Google Calendar – share your availability
- Wrap up and prep for the next business day, before this one ends

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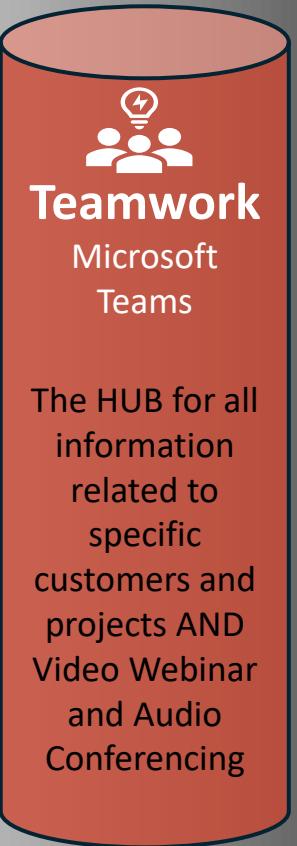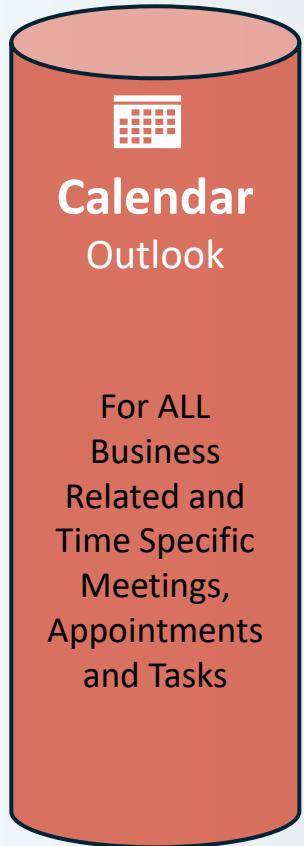
Upskilling/Boot Camp Program

For MAFSI Members thru 12/1/25

SPECIAL OFFER*
25% off
Normally $750 per person

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