Below is a **ready-to-use worksheet** that guides you through the first step of identifying and organizing your “Sales Silos.” Simply **copy and paste** into a document of your choice (Google Doc, Word, PDF, etc.) and format or print as needed. This worksheet will help you track tasks, group them, and focus on the **best use of your time** for higher sales productivity.

## **SALES SILOS WORKSHEET**

### **Overview**

1. **Brain Dump** (3–5 days)
2. **Group and Name** (combine similar tasks)
3. **Identify Your Five Silos**
4. **Eliminate Non-Essential Tasks**

## **Step 1: Brain Dump**

**Instructions:** For a minimum of three and a maximum of five workdays, capture **every** task you do. At the end of each hour (or day), list the tasks completed. *Don’t filter—just write it all down.*

**Day 1:**

* Hour 1:
* Hour 2:
* Hour 3:
* Hour 4:
* Hour 5:
* Hour 6:
* Hour 7:
* Hour 8:

(Repeat as needed for each day.)

*Use additional pages for Day 2, Day 3, etc.*

**Step 2: Group and Name**

1. **Review your full task list** from Step 1.
2. **Group similar items** together (for example, “Prospecting” tasks, “Client Calls,” “Follow-Ups,” “Administration,” etc.).
3. **Give each group a descriptive name.**

**Grouping Example:**

| **Group Name** | **Tasks That Belong Here** |
| --- | --- |
| Manage Existing Accounts | - Followed up on delivery dates - Emailed top clients - Held monthly check-in meetings |
| Find New Customers | - Online research for potential leads - Cold-calling - Sending introduction emails |
| ... and so on |  |

Use the table below to create your own groups:

| **Group Name** | **Tasks That Belong Here** |
| --- | --- |
|  |  |
|  |  |
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## **Step 3: Identify Your Five “Sales Silos”**

1. **Consolidate your groups** until you’re left with a maximum of **five** core Silos.
2. List them below and note any quick examples or descriptions.

| **Silo #** | **Sales Silo Title** | **Brief Description/Focus** |
| --- | --- | --- |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |

## **Step 4: Eliminate or Defer Non-Essential Tasks**

1. **Look at each task** you listed from Step 1.
2. **Assign it to one of your five Silos** above—or **decide to eliminate** or **defer** it.

**Recommended Method:**

* For tasks that **do not** fit any Silo:
  + Print them out, put them in an envelope, and seal it.
  + Write a date one week from now. If you don’t open the envelope by then, **throw it away**.

### **Defer/Eliminate Tasks**

Use this table to note down tasks that don’t align with your Sales Silos:

| **Task** | **Reason for Eliminating or Deferring** | **Action (Eliminate/Defer)** |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |

## **Next Steps**

You have now:

1. **Tracked** how you spend your time.
2. **Grouped** tasks into categories.
3. **Named** your **top five Sales Silos**.
4. **Eliminated** or deferred any tasks that don’t align.

**Bring this completed worksheet** to the January Sales Vault workshop. We’ll then dive deeper into:

* **Specific Sales Activities** (Step Two)
* **Long-Range Planning** (Step Three)
* **Short-Range Planning** (Step Four)
* **Engagement/Execution** (Step Five)

## **Join The Sales Vault**

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### **Congratulations on Taking the First Step!**

*“You can do anything, but you can’t do everything.”* By narrowing your focus to five core areas, you’ll supercharge your productivity and watch your sales soar. We look forward to seeing you in **January’s Sales Vault** sessions!