GetAccept

3 things killing your sales efficiency

And how to fix them

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Introduction

Hundreds of sales conversations. One clear takeaway: Your process is holding you back.

Over the past six months, we've reviewed hundreds of conversations between our team and the sales professionals reaching out to us – prospects, customers, champions, sceptics, all of them.

And what we found was surprisingly consistent:

Sales process inefficiencies are the #1 challenge sales teams are trying to solve.

Of course, there's a bit of a bias baked in – people usually come to GetAccept when something in their process is broken.

They're stuck in admin loops, chasing PDFs, or losing visibility on deals. So yes, they're actively looking for help.

But what stood out was the universality of the pain.

No matter the industry, team size, or sales methodology, the same problems kept popping up:

- Communication and document management is scattered and messy.
- Reps are overwhelmed with admin tasks that don't move deals forward.
- Zero insight into what buyers are doing after "Send".

So, we created this guide to help.

Not just to diagnose what's slowing your team down – but to give you practical steps to streamline your sales process, unlock more selling time, and ultimately close more deals.

Full disclosure:

We think Digital Sales Room software like GetAccept plays a big role in fixing these problems. But this isn't just a product pitch. It's a playbook for sales teams who are done losing time and ready to work smarter.

GetAccept

Problem 1

Your communication and sales collateral are all over the place.

Problem 1: Fragmented communication and document storage

Scattered, non-centralized communication and content are killing your deals.

In an ideal world, your sales team would have one place to manage conversations, collaborate with buyers, and access all the documents they need – fast.

But reality looks more like this:

Docs buried in someone's inbox. Proposals lost in version control hell. Buyer conversations spread across email, Slack, LinkedIn DMs, and a rogue WhatsApp message.

Internal teams working in silos, each with their own "latest" version of the pitch deck.

Red flags to watch out for:

Sellers

- ❑ Sales and marketing store assets in different places. It's hard to find stuff.
- ❑ Proposals are sent via email as PDFs.
- ❑ Reps duplicate efforts because templates aren't centralized.
- ❑ Your reps ask "What version are we using?" over and over (and over) again.

Buyers

- ❑ Buyers use multiple channels to communicate (and info gets lost).
- ❑ Buyers struggle to find and share information with other important stakeholders.

The cost of fragmentation

💸 Sales reps spend 440 hours per year searching for content – the equivalent of 55 full workdays lost annually.

💸 84% of buyers say it takes too long to get needed info from vendors, and more than half will switch to a competitor if communication is too slow.

💸 B2B buyers now expect real-time responses and seamless communication across channels. 80% want sellers to engage across multiple touchpoints without repeating info.

The fix: From fragmentation to flow

What’s slowing you down – and what better looks like.

Fragementation problems	Flow-friendly fix
🆘 **Content is scattered across drives, emails, and Slack channels:** Reps waste time hunting, buyers lose track of attachments in endless email chains.	✅ **Centralize all content in one shared digital sales room:** Always up-to-date, searchable, and accessible for everyone involved.
🆘 **Reps build proposals from scratch:** Inconsistent branding and messaging make your offer look unprofessional. Buyers get confused when layouts and language vary.	✅ **Use branded, modular proposal templates that reps can customize quickly:** Buyers get clear, consistent messaging every time.
🆘 **Communication is spread across channels:** Reps forget who said what where. Buyers have to dig through inboxes to find info.	✅ **Create a single, shared deal space with built-in chat and timeline:** All communication, comments, and updates in one place.
🆘 **Stakeholders ask the same questions again and again:** Because they missed a call or didn’t see the doc. Reps spend hours repeating themselves.	✅ **Use mutual action plans and document comments:** Align buyers and sellers with clear milestones, and track questions/responses in context.
🆘 **Buyers feel overwhelmed and disorganized:** When there’s no clear place to view the offer, understand value, or bring in others, they delay or disengage.	✅ **Design your deal experience like a landing page:** Easy to navigate, easy to share, and tailored to their needs.

3-step framework for fixing fragmentation

3 steps to get you started on your way to a more centralized process.

Step 1: Audit your current communication flow

- ❑ Where are proposals, contracts, and decks currently stored?
- ❑ How are they being sent?
- ❑ How do buyers respond or ask questions?

Step 2: Centralize all sales materials in a shared content library

- ❑ Create a single source of truth for sales docs (proposals, templates, case studies).
- ❑ Make it accessible to Marketing, Sales, and anyone else involved in creating & sharing content.

Step 3: Shift communication into a shared space

- ❑ Use a digital sales room to create one hub per opportunity.
- ❑ Let buyers access everything in one place.
- ❑ Enable in-document chat and activity tracking to keep momentum going.

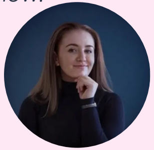
Real life results

By using GetAccept's proposal and content platform integrated with Salesforce, Dealfront centralized all sales content and streamlined communication into a single, buyer-facing workspace.

- ✓ **75% reduction** in time spent sharing info with prospects
- ✓ **Sales cycle cut** from 150 days to just 50
- ✓ **Full visibility** into buyer engagement and document interaction
- ✓ **Instant follow-ups** via in-document chat

My sales process and communication with my prospects are way more project and solution-oriented now.

Carolina Bräuninger
Senior Strategic Account Executive EMEA



Read the full case study here

Problem 2

Your reps are drowning in admin.

Problem 2: Excessive administrative burden

Reps are wasting valuable selling time on manual data entry, document creation, and follow-ups.

Sales reps are spending hours each week updating CRMs, logging calls, digging up past proposals, or manually crafting follow-up emails that sound exactly like the last 17 they send.

Every admin task, no matter how small, steals time from what actually drives revenue: having real conversations with prospects.

And it adds up – fast.

Red flags to watch out for:

- ❑ Your reps are complaining about "too much admin".
- ❑ "I'll update the CRM later..."
- ❑ Everyone is building their own assets.
- ❑ Pipeline reviews are full of gaps and it's hard to get a clear view of deal progress.
- ❑ Onboarding reps takes forever because there are so many systems and places to find things.
- ❑ Follow-ups are manual and inconsistent.

> We know this is our job as sales people, but admin is killing our time. It's killing what we need to do. – *Yasmine F., Sr. Account Executive at GetAccept*

The cost of admin overload

According to Salesforce's State of Sales report, reps spend 70% of their time on non-selling tasks.

And beyond just time, this burden also leads to:

- Slower deal velocity (because reps are too busy to follow up fast).
- Burnout and frustration (goodbye morale; hello churn).
- Inconsistent data (when updates are skipped, your CRM turns into a graveyard).

On investigating what practices set outperforming B2B sales organization apart, McKinsey found that "freeing up seller time for customer-facing activities" was significant.

Problem 2: Understand where admin burden is happening

Solving the burden of excess admin means fully understanding *where* in your sales process the problems actually are.

1. Lead qualification and outreach
2. Discovery and needs analysis
3. Proposal and contract creation
4. Negotiation and follow-ups
5. Closing and signatures
6. Post-sale and onboarding

In this section, we guide you through the stages of a standard B2B sales process and identify the areas where sales reps are most often burdened with excess admin tasks.

Of course, your own sales process will probably differ from this – a little, or a lot, depending on your industry. But you can use the following framework as a starting point to look at the specifics of your own process.

1 Lead qualification and outreach

Admin issues:

- ❑ Manual data entry into CRM.
- ❑ Scattered notes from calls and emails.
- ❑ Reps wasting time on unqualified leads.

How to fix it:

- Automate lead capture and scoring in your CRM.
- Use AI-powered email sequencing tools.
- Centralize prospect communication and documentation in a digital sales room.

How proposal software can help:

- Centralized platform for storing all prospect communication and docs.
- Auto-fill proposal details based on CRM data.

2 Discovery and needs analysis

Admin issues:

- ❑ Reps manually sending follow-up emails.
- ❑ Sales decks & documents spread across multiple tools.
- ❑ No easy way to track if buyers engage with materials.

How to fix it:

- Use templates for discovery call summaries.
- Automate meeting follow-ups.
- Track prospect engagement with shared documents.

How proposal software can help:

- Sales reps can track what parts of a doc buyers are spending time on.
- Buyers can engage with proposals and leave comments in real-time.

3 Proposal and contract creation

Admin issues:

- ❑ Manually building each proposal from scratch.
- ❑ Formatting and version control chaos.
- ❑ Slow approval processes causing bottlenecks

How to fix it:

- Use standardized proposal & contract templates.
- Use a central content library that makes it easy for reps to find and add content.
- Enable instant customization without manual edits.

How proposal software can help:

- Pre-built templates reduce proposal creation time by 80%.
- Intuitive editor makes it easy to drag-and-drop content from library into proposals.

4 Negotiation and follow-ups

Admin issues:

- ❑ No visibility into whether prospects have read the proposal.
- ❑ Sales reps manually chasing prospects.
- ❑ Delayed responses leading to lost deals.

How to fix it:

- Set up automated follow-ups based on buyer activity.
- Track proposal engagement (views, time spent, interactions) so you know what information buyers are interested in.
- Provide an interactive space for buyers to ask questions in real time.

How proposal software can help:

- Real-time tracking shows when and how buyers engage.
- Automated reminders ensure timely follow-ups.

5 Closing and contract signing

Admin issues:

- ❑ Long delays waiting for signatures.
- ❑ Reps manually chasing legal teams and whoever else for approvals.
- ❑ Buyers are printing, signing, scanning, and emailing back contracts.

How to fix it:

- Use digital contract workflows for faster approvals.
- Enable e-signatures to eliminate paperwork delays.
- Set automated reminders for pending signatures.

How proposal software can help:

- E-signature and QES functionality for speed and security.
- Automated alerts notify reps when contracts are signed.

6 Post-sale and onboarding

Admin issues:

- ❑ Reps manually handing off deal info to customer success.
- ❑ Chasing contract terms and obligations.

How to fix it:

- Auto-sync signed deal data with your CRM.
- Use a centralized contract repository for easy access.
- Automate onboarding document sharing.

How proposal software can help:

- Centralized repository for all deal documents and agreements.
- Easy access to contract terms, renewal dates, and commitments in one place.

Problem 3

You’re selling in the dark.

Problem 3: Lack of visibility into buyer engagement

You have no idea how buyers are engaging or if they're involving the right stakeholders.

You send the proposal.
You wait.
You follow up.
Are they reading it? Sharing it? Ghosting you?

Welcome to the sales equivalent of shouting into the void.

When your team has no insight into what happens after a document is sent, every follow-up becomes a guessing game. And guessing isn't a strategy – it's a gamble.

Red flags to watch out for:

- ❑ No insight into who else (beyond the original contact) is viewing the doc internally.
- ❑ Sales leaders asking "Which deals are active?" and getting vague answers like "I think they're still interested".
- ❑ Accurate pipeline forecasts are impossible.
- ❑ Follow-ups based on time, not intent. E.g. "It's been 3 days, so I'm checking in" (a.k.a. *the sad follow-up*).
- ❑ Reps sending a proposal and saying, "Let's circle back in a few days" without knowing if it's even been opened.

The cost of flying blind

🚨 The average enterprise B2B buying group consists of 5-11 stakeholders – but can flex up to 20 – who represent an average of five distinct business functions.

It's not unheard of to miss a key player during early deal negotiations and realise later that everything rested on their input.

Understanding exactly who is involved in a decision, as soon as possible, can make or break a deal.

🚨 For 14% of businesses, the top cause of lost deals was how hard it was to talk to the right people.

The fix: From guesswork to clarity

We're not psychic. And we don't need to sell like we are.

Missed opportunities (What you can't see)	Visibility and action (What you can do instead)
🆘 **Reps don't know if the proposal was even opened**, so follow-ups feel awkward or premature.	✅ **Use proposal software with open + view tracking** to time follow-ups when buyers are actively engaged.
🆘 **Sales leaders can't tell which deals are *actually progressing:*** *The* pipeline looks full but feels fake.	✅ **Track buyer document activity** (time spent, re-opens, shares) to identify high-intent opportunities vs. stalled ones.
🆘 **Reps don't know who else is involved in the decision:** Deals derail when the unknown stakeholder appears late.	✅ **Use document forwarding insights** to uncover hidden stakeholders and loop them in earlier.
🆘 **No insight into what buyers care about most:** Reps guess at objections or priorities.	✅ **Analyze page-by-page engagement (e.g. pricing, scope, case studies)** to tailor follow-up and messaging.
🆘 **Reps follow up at random:** Hoping for a reply instead of working from real signals.	✅ **Set alerts for buyer engagement spikes** – like reopens or new stakeholder views – to follow up when it matters.

Shameless plug

Our Digital Sales Room software is the answer to your tracking & analytics prayers.

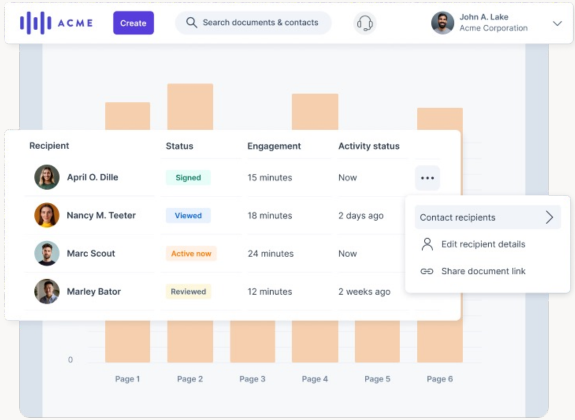
✓ **Document tracking:** See which pages are capturing attention and for how long.

✓ **Stakeholder insights:** See who buyers are sharing deal details with.

✓ **Sales intelligence:** Get a comprehensive overview of your deals, with insights into which are on track to close.

✓ **Notifications:** Get alerted when buyers engage and when new stakeholders appear.

✓ **Inside your CRM:** Bring all these insights into your CRM for a complete view of your deals.



See for yourself. [Start a free trial](#).

Real life results

GetAccept helps SalesScreen to create accountability among their sales reps, boost their win rate, and quickly create unique deal rooms tailored to each enterprise customer. And thanks to tracking and analytics, sellers have real-time insights into which deals are they should be focusing on – and *how*.

✓ **100% increase in win rate** with help from GetAccept.

✓ **2x revenue growth from Q2 to Q3** after changing to GetAccept.

✓ Ability to understand **which deals are active and hot.**

It helps us to answer the question: Is this deal ice cold or warm?.

Remi Morken
Senior Vice President of Sales

[Read the full case study here](#)