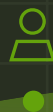


How NZ B2B Sales Teams Win Back **15+ Hours a Week** Without Overhauling Your Tech Stack

Automate the admin, keep the human touch. The free guide to ending double entry and follow-up that slips through the cracks, even if you're snowed under and not remotely technical.

For owners and sales leaders drowning in double entry. No rip-and-replace, just the tools you already own, finally working together. Start with one win in the next 20 minutes.



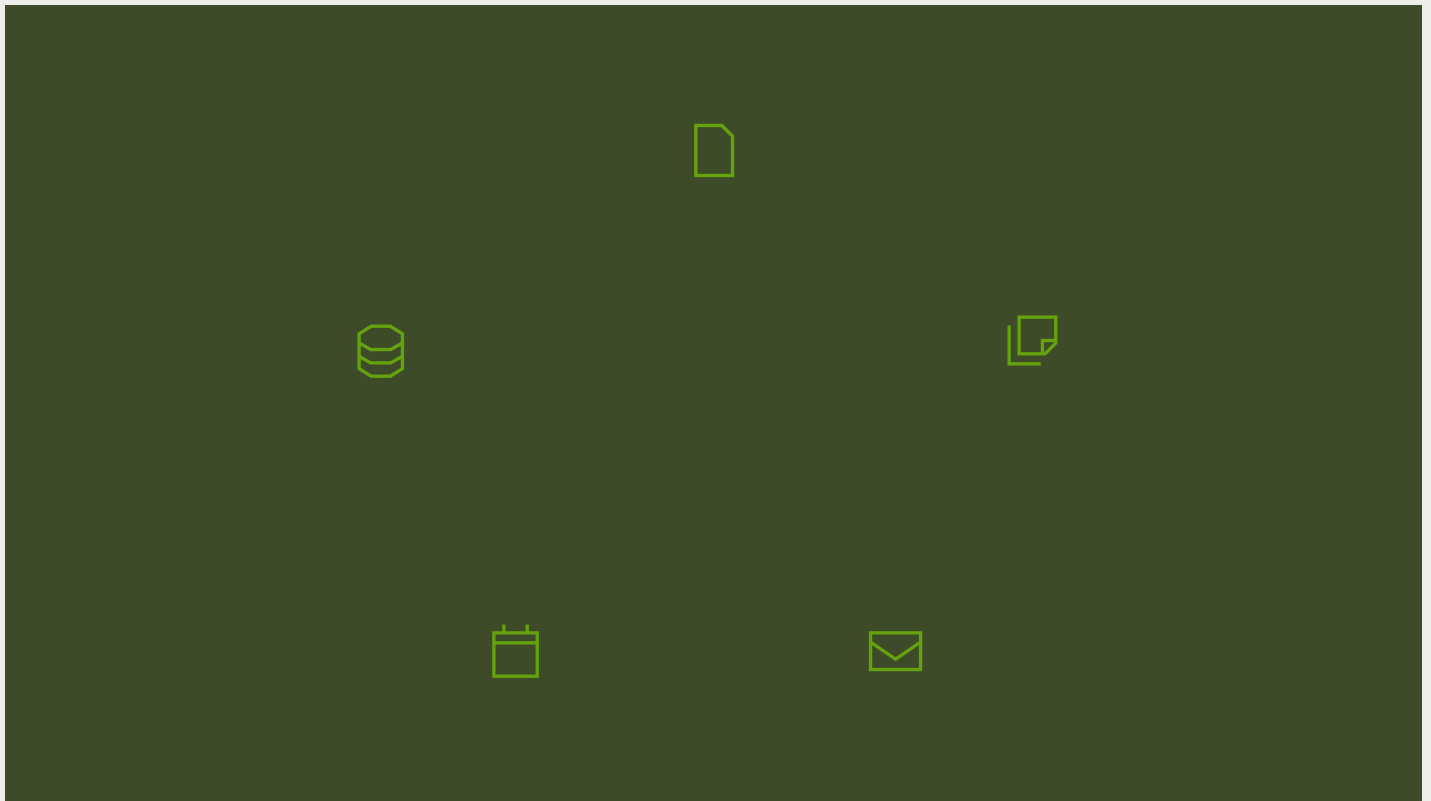
3 QUICK WINS TODAY (UNDER 20 MINS)

- ✓ Connect your email, calendar and CRM
- ✓ Send follow-ups in your voice, drafted by AI
- ✓ Do it all from your phone

PLUS

- ✓ What is the disconnect costing you? Free calculator
- ✓ What a fully connected sales engine looks like, running across your team without you

Your sales stack is five islands.



Most NZ sales teams don't have a software problem. They have a connection problem.

You've got a CRM, an email inbox, a calendar, a notes app, maybe a dialler or an order form on top. And not one of them talks to the next. So the same contact, the same meeting, the same order gets keyed in by hand, in three or four different places. Reps call it the ten-minutes-per-record tax: fill the form, then re-type it into the CRM, then chase the order separately.

It costs more than time. The owner never sees the whole picture, follow-up slips through the cracks, and every new tool you bench-test just adds another island.

So the obvious move: go shopping for a better tool, is the one that makes it worse: another login, another subscription, another app the reps quietly won't adopt. You don't need more software. You need the tools you already own to start talking. But first, look at what the disconnect is actually costing you.

The hours hiding in plain sight.

Here's the sum most owners never stop to do. Take a rep running site visits. Everything below happens by hand, because the tools don't talk:

Fill in the visit / audit form: stock, planogram, notes	~4 min
Log the order, then label and upload the photos	~3 min
Re-key it all into the CRM or spreadsheet later	~3 min
Manual admin per visit	~10 min

Now stack it up. At roughly **12 visits a day**, that's about two hours a day, **ten hours a week** gone to re-typing. Add three to five hours of back-office catch-up and you land at:

15+

hours a week

per rep, before a single new sale

See Your Own Number

On a three-rep team, that's a full extra person's working week every week, and none of it grows the business. It's a salary you're already paying, spent entirely on re-typing.

Plug in your team size, visits a day and minutes per record, and watch the real figure, and what it's costing you in dollars a year.

Most owners are surprised it's higher.

→ **Run the free calculator at bizbo.co.nz/calculator**

Here's the good part: you can claw the first chunk of that back in the next 20 minutes, on your own, with the tools you've already got.



Teach AI to write in your voice.

By the end of this, Claude is reading your inbox and drafting replies in your exact tone so follow-up stops eating your evenings and never sounds like a robot. It's a one-time setup you reuse forever.



Watch these steps as a video

bizbo.co.nz/connected-sales-quick-wins

01 Connect your inbox

~2 min

In a new Claude chat, tap the + and switch on the Gmail/Microsoft 365 connector, and approve read and draft access when Google asks. Then check it's actually listening:

PASTE THIS

Show me the last 3 emails I haven't replied to yet.

✓ You'll know it worked when it lists real threads from your actual inbox not a generic example.

02 Teach it your voice

~10 min

Create a 'skill' that enables Claude to draft responses in your unique style, ensuring clients recognise your voice instead of a robotic tone.

PASTE THIS

Look up my past emails. Learn my tone, sentence length, greetings and sign-offs, and write every reply in this voice from now on. First, summarise my voice back to me in 5 bullets so I can check you've got it. /skill-creator

✓ You'll know it worked when the 5 bullets sound like you e.g: short paragraphs, no corporate filler, signs off Cheers.

03 Draft a real reply, in your voice

~5 min

PASTE THIS

Draft a follow-up to [name] about [deal]. My voice, under 120 words, one clear next step. Put it in my Gmail drafts.

Read it, change a word if you want, and send. It drafts; you send. Claude never fires an email behind your back, so the relationship that closes the deal stays yours.

✓ *You'll know it worked when the draft reads like you wrote it on a good day, and it took 30 seconds, not 10 minutes.*

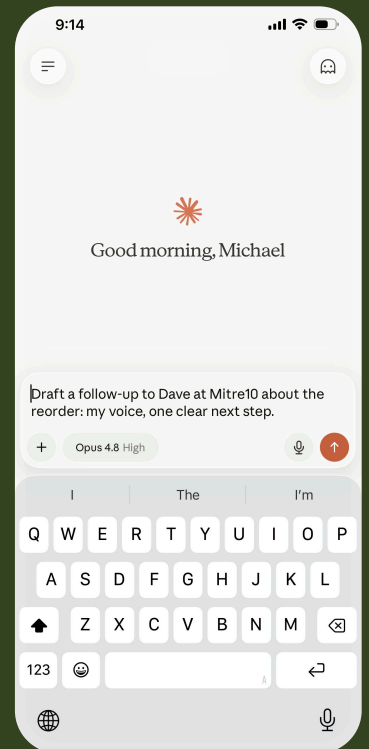
FROM THE ROAD

Now do it from your phone.

Voice commands are ready in the Claude app on your phone. Connect once on your laptop, and it syncs for next time. After a site visit, just tap the mic and speak. By the time you're back in your vehicle, the reply is drafted in your voice, ready for a quick review. That's ten minutes of admin time saved.

TAP THE MIC AND SAY

"Draft a follow-up to Dave at Mitre10 about the reorder: my voice, one clear next step."



Watch two islands talk.

You've taught it your voice. Now connect your calendar and your CRM, and the guide proves its own point: the islands become one engine.

In Claude's connector directory, switch on Google Calendar and your CRM. HubSpot's connector is free (paid Claude plan required); Salesforce and Pipedrive work the same way. Set Write actions to "Needs Approval": Claude proposes every change and waits for your nod.

05 Log the visit, book the follow-up

~5 min

Instead of re-keying that visit into the CRM later, say it once and let both tools update:

PASTE THIS

Log a note on Dave Kerr's contact in HubSpot summarising today's visit: [paste your dictated note]. Then book a 15-minute reminder in my calendar to check in with Dave next Tuesday.

✓ *You'll know it worked when the note sits on Dave's contact in HubSpot and the reminder is in your calendar, and you never opened either app to put them there.*

THINGS YOU CAN ALSO TRY

Connect your financials too (e.g. Xero) alongside calendar and CRM, and you have real power in your hands:

- Search Xero for former customers who'd be good for a coffee catch-up.
- Check HubSpot for warm leads that have gone quiet, and draft follow-ups in my voice.
- What's on my calendar this week, and which meetings need prep?

You've now connected three islands, email, calendar and CRM, by hand, one prompt at a time. That's the connected engine, in miniature. The hours are already coming back.



Watch these steps as a video

bizbo.co.nz/connected-sales-quick-wins

Three islands down. Now the whole engine.

The full engine runs without you, across your whole team, including the tricky tools that have no off-the-shelf connector. That's what we build together. No rip-and-replace, keeping the human exactly where your deals get won.

01 Get your time back: an always-on assistant

Built on Claude and briefed on your business: it preps your day, surfaces the deals that need you, and keeps your to-dos moving, drafting and confirming before anything goes out.

02 Stop the re-typing: custom integrations

We connect the tools that have no off-the-shelf connector: your field-sales app, your order system, that legacy database, so everything finally talks.

03 Let the repeat work run itself: automations

Data synced across your apps automatically; follow-ups drafted in your voice, ready for your tap. The admin runs quietly in the background while your team sells.

WORK WITH ME

Book a free Roadmap session today.

We map your stack live, show you exactly where the hours are leaking, and you leave with a one-page roadmap to win them back, whether or not you work with us.

→ **Book your free Roadmap session**

bizbo.co.nz/book-consultation · hello@bizbo.co.nz

