



LESSON 3 WORKSHEET

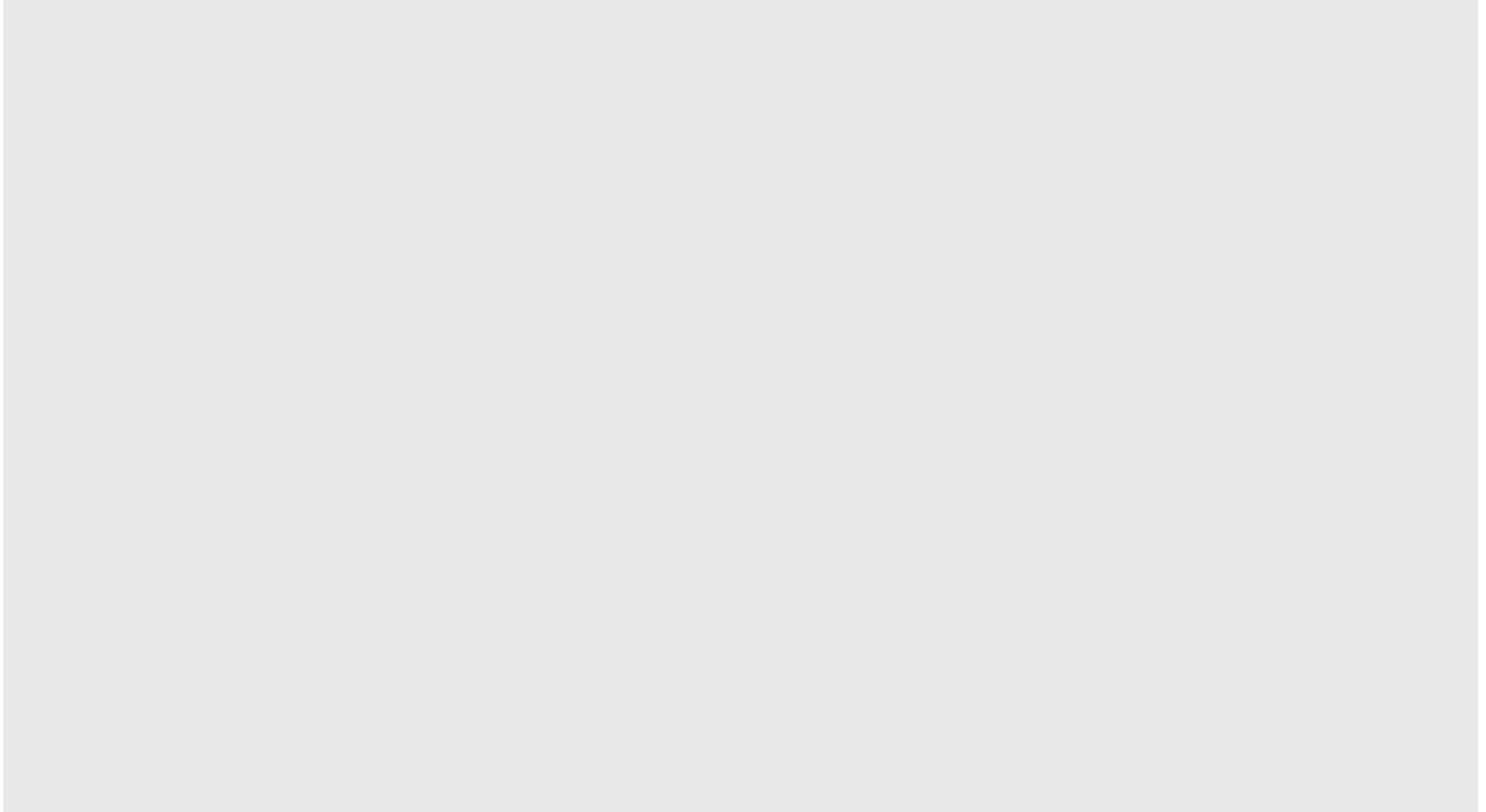
The Sales Call

*The 7-part formula for
closing high ticket clients*

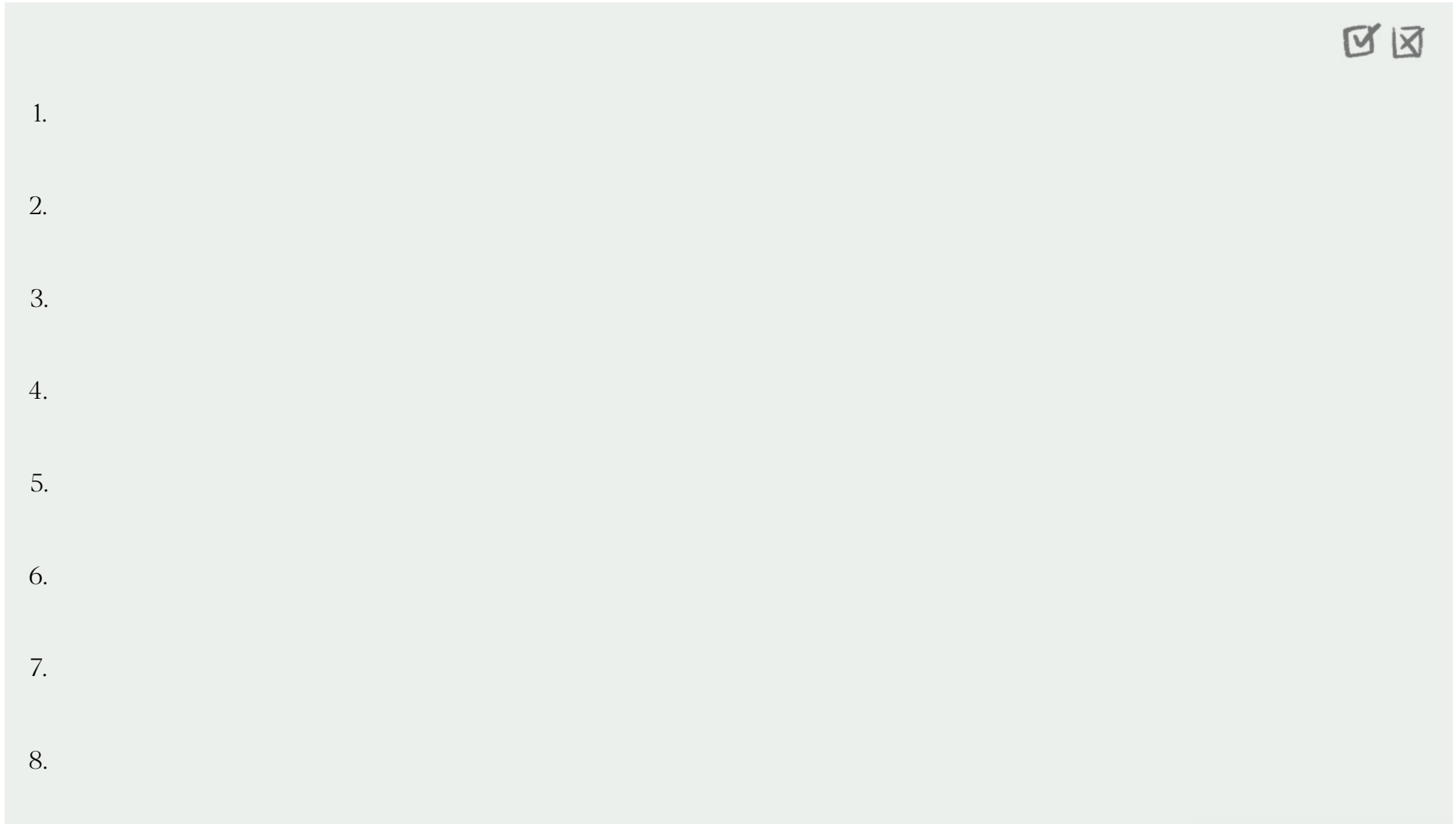


Clients by
DESIGN

Notes



The 8 most common sales calls mistakes



PART 1

Create Empathy and Rapport

Your ideas for conversation starters + notes from their responses:

Prompt ideas:

Where are you calling in from?

Heard you've been having great weather this time of year!

I saw on your Instagram that _____, what a coincidence, me too!

PART 2

Setting Intentions

Your script for intention setting + notes from their responses:

Intention setting script example:

“Well I won’t rob any more of your time with small talk, so let’s dive in. My understanding is that the intention of our call together is for us to find out if we’d be a good fit to work together on your project, correct? Great, so I’ll start by asking you a few questions about your needs and goals for the project, then if I feel I would be the right person to help you I’ll let you know what that can look like, and at the end of the call we make a decision together about what the next steps can look like. Does that sound good? Just a quick reminder that we have until the top of the hour together for this, so I’ll do my best to keep things succinct.”

PART 3

Uncover their needs

Your notes from their responses:

Questions:

What are you after?

Why is this important to you/your business?

Why now?

PART 4

Identify what success looks like for them

Your notes from their responses:

Questions:

What would need to happen to make this project a success in your eyes?

What is the end goal with this project from a business perspective?

What are you hoping this project will help you accomplish?

PART 5

Make them feel like you're the best person to help them

Your notes from their responses:

Questions:

Why do you feel I would be the best person to help with this? What made you seek out my help?

OR

"Great, from this information you've given me I feel that you're in the right place, and I'm confident that I could help bring this project to life and make it a success. Should I go ahead and explain how I believe I can best help?"

AND

From everything you just shared, I have to say that this project really sounds ideal because... I have to say Jim, from everything I've found out from you on this call, I can already tell that I will love working with you if we end up working together because...

PART 6

Describe the process and how you'll help them

Your notes from their responses:

The proposed project scope and timeline:

PART 7

Agree on next steps

Your notes about next steps:

Did they give you a verbal yes?

When did you agree to send them the written proposal by?

Or when did you agree to check back-in with them to see if they want to go forward with the project?