WORKSHOP 1

Mapping Your Sales Flow

You can't fix a process you haven't written down

⏱ 30–45 MINUTES

"If you can't show it to a new team member in 10 minutes and have them run it — it's not a system. It's a habit."

The Problem We're Solving

- Most service businesses run their sales process entirely in the owner's head.
- When the owner is busy, sick, or away — the sales process stops.
- Enquiries go cold. Proposals don't get followed up.
- Work is lost to competitors who had a better system — not a better service.
- The fix: write it down, build it out, hand it over.

The 5-Stage Sales Flow

1. ATTRACT

How do people find out you exist?
Website, referrals, signage, social media, Google.

2. CONTACT

The moment they put their hand up.
Phone call, email, enquiry form, walk-in.

3. QUALIFY

Working out if they're the right fit — and if you're the right fit for them.

4. CONVERT

Turning the conversation into a proposal, meeting, or formal quote.

5. COMMIT

Getting the agreement signed, the deposit in, and the start date locked.

STAGE 1 — ATTRACT

How do people find out you exist?

- ✓ Professional, up-to-date website that clearly explains what we do and who we help
- ✓ Google My Business listing complete, accurate, with recent reviews
- ✓ Active on at least one relevant social media platform
- ✓ Structured referral strategy — we actively ask past clients for referrals
- ✓ Member of at least one professional network (BNI, industry association, etc.)
- ✓ Vehicles, uniforms, and site signage display our brand and contact details
- ✓ We track where enquiries come from so we know which channels work

STAGE 2 — CONTACT

The moment they put their hand up

- ✓ All calls answered promptly — clear process for missed calls
- ✓ Whoever answers has a script or qualification guide they follow consistently
- ✓ Email and website enquiries responded to within 1 business hour
- ✓ Social media DMs responded to within the same business day
- ✓ Every enquiry recorded — name, number, source, and what they need
- ✓ We do not quote on the first call — we qualify first
- ✓ The first impression we give on the phone matches the quality of our work

STAGE 3 — QUALIFY

Working out if it's the right fit — both ways

- ✓ L — Location: always ask where before agreeing to visit or quote
- ✓ W — What: always ask scope before committing our time
- ✓ T — Time: always ask when — our key urgency question
- ✓ A — Authority: always ask who else is in the decision before building a proposal
- ✓ M — Means: always ask about budget before investing in a detailed quote
- ✓ We have a written ideal client profile (NWAM) and a PINTA red-flag list
- ✓ We confidently say no to work that is not the right fit

STAGE 4 — CONVERT

Turning the conversation into a signed proposal

- ✓ Confirmation email within 24hrs with 'Questions to Ask' doc and guarantee
- ✓ Phone call 24hrs later to confirm receipt and answer questions
- ✓ Personalised day-before email with 'Things to Consider' document
- ✓ Same-day confirmation text the morning of every meeting
- ✓ Meeting with WOW Pack — leave it with the client every time
- ✓ Same-day thank you email with testimonials attached
- ✓ Proposal with cover letter + 24hr follow-up call: 'What did you think?'

STAGE 5 — COMMIT

A sale isn't a sale until the deposit is in

- ✓ Signed agreement from all decision-makers before work starts
- ✓ Deposit collected and cleared before starting
- ✓ Confirmed start date agreed by both parties
- ✓ Pre-start checklist complete (access, materials, site requirements)
- ✓ Client briefed on exactly what happens next and when
- ✓ Job entered into tracking system before work begins
- ✓ We track our conversion rate — proposals sent vs jobs won

WORKBOOK ACTIVITY — All 5 Stages

Rate each suggestion Y / N / M — then complete the improvement box

- Open your workbook to the stage pages.
- For each stage: rate every suggestion Y (Yes) / N (No) / M (Maybe).
- Fill in the improvement box — what will you do, by when, and who owns it?
- On the summary page: circle the traffic light rating for each stage.
- Identify your single biggest priority across the whole flow.

YOUR ACTION THIS WEEK

1	Write down your sales flow in full — all steps from first contact to deposit received.
2	Identify the one stage where you lose the most leads and bring that to Workshop 2.
3	Count how many active enquiries you currently have and where each sits in the flow.

GO DEEPER — WEBSITE RESOURCES

Sales Flow (CONVERT) — Identify and remove blockages in your sales process.

Sales Process (CONVERT) — Build a process that's easy to follow up, track, and train.

Sales Process Flow Chart (SYSTEMS) — An example flow chart to adapt for your business.

Customer Journey (SYSTEMS) — Map the full client experience from first contact to completion.