BUSINESS MAXIMISER COACHING

## WORKSHOP 1 — WORKBOOK

# Mapping Your Sales Flow

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

**Name:** ____________________ **Business:** ____________________ **Date:** ____________________

**HOW TO USE THIS WORKBOOK**

For each stage, rate each suggestion Y (Yes), N (No), or M (Maybe/Partially). On the summary page, use the traffic light to rate your overall performance at each stage. Use the improvement boxes to capture what you will do about it.

| ● GREEN | ● YELLOW | ● ORANGE | ● RED |
| --- | --- | --- | --- |
| On track — doing this well and consistently. | Needs attention — done sometimes but inconsistently. | Priority area — significant gaps, address soon. | Urgent action — not doing this at all. |

## STAGE 1 — ATTRACT

*How do people find out you exist?*

| Best-Practice Suggestion | Y | N | M |
|---|---|---|---|
| We have a professional, up-to-date business website that clearly explains what we do and who we help | ☐ | ☐ | ☐ |
| Our Google My Business listing is complete, accurate, and has recent reviews | ☐ | ☐ | ☐ |
| We are active on at least one social media platform relevant to our target clients | ☐ | ☐ | ☐ |
| We have a structured referral strategy — we actively ask past clients for referrals | ☐ | ☐ | ☐ |
| We are part of at least one professional network or group (BNI, industry association, etc.) | ☐ | ☐ | ☐ |
| Our vehicles, uniforms, and site signage all display our brand and contact details | ☐ | ☐ | ☐ |
| We have a clear, consistent online presence across all platforms (same logo, message, contact info) | ☐ | ☐ | ☐ |
| We track where our enquiries come from so we know which channels are working | ☐ | ☐ | ☐ |
| We have a Google review strategy — we ask every happy client to leave a review | ☐ | ☐ | ☐ |
| We regularly communicate with our past client database (newsletter, update, or check-in) | ☐ | ☐ | ☐ |

| What will I do to improve my ATTRACT stage? | By when? / Who owns it? |
|---|---|
| | |
| | |
| | |
| | |

## STAGE 2 — CONTACT

*The moment they put their hand up*

| Best-Practice Suggestion | Y | N | M |
|---|---|---|---|
| All phone calls are answered promptly during business hours — we have a clear process for missed calls | ☐ | ☐ | ☐ |
| Whoever answers the phone has a script or qualification guide they follow consistently | ☐ | ☐ | ☐ |
| We respond to email and website enquiries within 1 business hour during operating hours | ☐ | ☐ | ☐ |
| We respond to social media messages and DMs within the same business day | ☐ | ☐ | ☐ |
| Our voicemail message is professional and tells callers when they can expect a call back | ☐ | ☐ | ☐ |
| We record every enquiry — name, number, where they heard about us, and what they need | ☐ | ☐ | ☐ |
| We do not quote on the first call — we qualify before we commit to a proposal | ☐ | ☐ | ☐ |
| We have a clear script for the first 60 seconds of every inbound call | ☐ | ☐ | ☐ |
| We follow up on every missed call the same business day | ☐ | ☐ | ☐ |
| The first impression we give on the phone matches the quality of our work | ☐ | ☐ | ☐ |

| What will I do to improve my CONTACT stage? | By when? / Who owns it? |
|---|---|
| | |
| | |
| | |
| | |

## QUALIFY

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

| **Best-Practice Suggestion** | Y | N | M |
|---|---|---|---|
| We always ask where they are located before agreeing to visit or quote (L — Location) | ☐ | ☐ | ☐ |
| We always ask what they are looking to have done before committing our time (W — What) | ☐ | ☐ | ☐ |
| We always ask when they need it completed — this is our urgency question (T — Time) | ☐ | ☐ | ☐ |
| We always ask who else is involved in the decision before we build a proposal (A — Authority) | ☐ | ☐ | ☐ |
| We always ask about budget or means before investing time in a detailed quote (M — Means) | ☐ | ☐ | ☐ |
| We have a clear picture of our ideal client — and we can describe them in one sentence | ☐ | ☐ | ☐ |
| We have a list of red-flag clients or jobs we will no longer accept (our PINTA list) | ☐ | ☐ | ☐ |
| We confidently say no to work that is not the right fit for our business | ☐ | ☐ | ☐ |
| We never prepare a detailed proposal without completing our qualification process first | ☐ | ☐ | ☐ |
| Our team (or anyone who answers the phone) knows how to qualify — not just take a message | ☐ | ☐ | ☐ |

| **What will I do to improve my QUALIFY stage?** | **By when? / Who owns it?** |
|---|---|
| | |
| | |
| | |
| | |

## STAGE 4 — CONVERT

*Turning the conversation into a signed proposal*

| Best-Practice Suggestion | Y | N | M |
|---|---|---|---|
| Within 24 hours of a qualified enquiry we send a confirmation email with relevant documents attached | ☐ | ☐ | ☐ |
| We call 24 hours after sending the email to confirm receipt and answer any questions | ☐ | ☐ | ☐ |
| We send a personalised day-before reminder before every site visit or meeting | ☐ | ☐ | ☐ |
| We send a same-day confirmation text the morning of every meeting | ☐ | ☐ | ☐ |
| We arrive at every meeting prepared — with our WOW Pack ready to leave with the client | ☐ | ☐ | ☐ |
| Our WOW Pack includes: About Us, Our Process, Testimonials, Our Guarantee, and Questions to Ask | ☐ | ☐ | ☐ |
| We send a thank-you email the same day as the meeting — with testimonials attached | ☐ | ☐ | ☐ |
| Every proposal has a personalised cover letter — not just a price list | ☐ | ☐ | ☐ |
| Our proposal clearly explains what is included, what is excluded, and what happens next | ☐ | ☐ | ☐ |
| We follow up by phone within 24 hours of sending every proposal and ask what they think | ☐ | ☐ | ☐ |

| What will I do to improve my CONVERT stage? | By when? / Who owns it? |
|---|---|
| | |
| | |
| | |
| | |

## STAGE 5 — COMMIT

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

| Best-Practice Suggestion | Y | N | M |
|---|---|---|---|
| We do not start work until we have a signed agreement from all decision-makers | ☐ | ☐ | ☐ |
| We collect a deposit before starting — and do not begin until it has cleared | ☐ | ☐ | ☐ |
| Every new job has a confirmed start date that both we and the client have agreed to | ☐ | ☐ | ☐ |
| We complete a pre-start checklist before every job (access, materials, site requirements) | ☐ | ☐ | ☐ |
| Every committed client is briefed on exactly what happens next and when | ☐ | ☐ | ☐ |
| Every job is entered into our job management or WIP tracking system before work begins | ☐ | ☐ | ☐ |
| We have a consistent payment schedule that protects our cash flow on every project | ☐ | ☐ | ☐ |
| We track our conversion rate — the percentage of proposals that become signed jobs | ☐ | ☐ | ☐ |
| We follow up on every uncommitted proposal until we get a clear yes or no | ☐ | ☐ | ☐ |
| Our clients never feel confused about what the next step is or what is expected of them | ☐ | ☐ | ☐ |

| What will I do to improve my COMMIT stage? | By when? / Who owns it? |
|---|---|
| | |
| | |
| | |
| | |

# YOUR SUMMARY

*Circle the traffic light that best reflects your overall rating at each stage*

| ATTRACT | CONTACT | QUALIFY | CONVERT | COMMIT |
|---|---|---|---|---|
| ● ● ● ● | ● ● ● ● | ● ● ● ● | ● ● ● ● | ● ● ● ● |
| **Biggest priority:** | **Biggest priority:** | **Biggest priority:** | **Biggest priority:** | **Biggest priority:** |

| My #1 priority from this workshop is: | I will complete this by: |
|---|---|
| | |

## 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.