

WORKSHOP 2

Qualifying Like a Pro

Stop quoting everyone. Start selling to the right people.

 30–45 MINUTES

"Just so I can help you best, would it be okay if I asked you a couple of questions? If I can't help you, I'll let you know. If I can, we'll work out the next step."

The Problem We're Solving

- Most service businesses quote too broadly and qualify too weakly.
- Hours spent preparing proposals for people who were never going to buy.
- Good qualification protects your time and improves your conversion rate.
- It also makes every conversation more confident — because you know who you're talking to.

STAGE 1 — OPENING

The first words that set the tone

- ✓ We have a written opening line that everyone uses when an enquiry comes in
- ✓ Our opening line puts the prospect at ease and invites them to share more
- ✓ We ask permission to ask questions before launching into qualification
- ✓ Our tone on the first call: warm, professional, and confident — not rushed
- ✓ We never give a price or commit to a proposal in the first 60 seconds
- ✓ Everyone who answers the phone uses the same consistent opening — not just the owner

STAGE 2 — LWTAM: QUALIFY

*The five questions that
protect your time*

- ✓ L — Location: always ask where before agreeing to visit or quote
- ✓ W — What/Scope: always ask what exactly they need before committing
- ✓ T — Time: always ask when — separates serious buyers from browsers
- ✓ A — Authority: always ask who else is in the decision — don't build for the wrong person
- ✓ M — Means: always ask about budget before investing in a detailed proposal
- ✓ Our qualification takes less than 10 minutes and feels like a helpful conversation
- ✓ Our team knows and uses all five LWTAM questions — not just the owner

STAGE 3 — IDEAL CLIENT: NWAM

*Knowing exactly who you
want to work with*

- ✓ N — Need: they have a genuine problem we can solve better than anyone else
- ✓ W — Want: they desire the outcome we deliver — they value quality, not just price
- ✓ A — Authority: they can make the decision without checking with someone else
- ✓ M — Means: their budget is realistic for the work they're asking for
- ✓ We have a written one-sentence description of our ideal client
- ✓ Every team member can clearly describe our ideal client when asked
- ✓ Our marketing speaks directly to our ideal client — not everyone

STAGE 4 — PINTA: RED FLAG LIST

*The clients and jobs you will
no longer take*

- ✓ We have a written list of client types or jobs we will no longer accept
- ✓ We can confidently and politely say no to work that doesn't fit
- ✓ Our team knows our PINTA list and is empowered to flag red flags early
- ✓ We have a process for referring PINTA clients on rather than just saying no
- ✓ We no longer let guilt or fear of losing work cause us to take on the wrong clients
- ✓ We review and update our PINTA list regularly as our business evolves

WORKBOOK ACTIVITY — All 4 Stages

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

- Rate each suggestion in all four sections: Y / N / M.
- Fill in the improvement box for each stage.
- Circle your traffic light rating on the summary page.
- Key output: a written phone script your whole team can use from today.

YOUR ACTION THIS WEEK

- 1 Finalise your phone qualification script and test it on the next three enquiries you receive.
- 2 Share it with whoever answers your phone — it should not live only in the owner's head.
- 3 Write your PINTA red-flag list: the three types of clients or jobs you will no longer quote.



GO DEEPER — WEBSITE RESOURCES

Sales Mindset & Scripts (CONVERT) — Inbound call scripts and pre-build questionnaires.

Right Work & Right Clients (ATTRACT) — Identify the right work — a must-do module for every member.

Ideal Target Market (ATTRACT) — Get more of the right customers with the right Market, Message and Medium.

Client Hot Buttons (ATTRACT) — Client frustrations, fears, wants and aspirations — foundation of great qualification.

ABC & D Grade Letters (RETAIN) — Templates for your best clients — and your PINTA clients who need repositioning.