

BUSINESS MAXIMISER COACHING
WORKSHOP 2 — WORKBOOK
Qualifying Like a Pro

Stop quoting everyone. Start selling to the right people.

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**

On track — doing this well and consistently.

● **YELLOW**

Needs attention — done sometimes but inconsistently.

● **ORANGE**

Priority area — significant gaps, address soon.

● **RED**

Urgent action — not doing this at all.

STAGE 1 — OPENING

The first words that set the tone

Best-Practice Suggestion	Y	N	M
We have a written opening line that everyone in the business uses when an enquiry comes in	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our opening line immediately puts the prospect at ease and invites them to share more	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We ask for permission to ask questions before launching into qualification	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our tone on the first call is warm, professional, and confident — not rushed or reactive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We never give a price or commit to a proposal in the first 60 seconds of a call	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We treat every inbound enquiry as an opportunity — not an inconvenience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have tested our opening line with real enquiries and refined it based on what works	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Everyone who answers the phone — not just the owner — uses the same consistent opening	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What will I do to improve my OPENING stage?	By when? / Who owns it?

LWTAM — QUALIFY

The five questions that protect your time and improve conversion

Best-Practice Suggestion	Y	N	M
We always ask where they are located before agreeing to visit or quote (L — Location)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We always ask what exactly they need done before committing to a proposal (W — What/Scope)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We always ask when they need it completed — our key urgency question (T — Time)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We always ask who else is involved in making the decision (A — Authority)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We always ask about budget or means before investing time in a detailed proposal (M — Means)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We never skip the timeframe question — it separates serious buyers from browsers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We never skip the authority question — we don't build proposals for people who can't say yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We document the answers to all five questions for every qualified enquiry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our qualification process takes less than 10 minutes and feels like a helpful conversation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our team knows and uses all five LWTAM questions — not just the owner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What will I do to improve my LWTAM — QUALIFY stage?	By when? / Who owns it?

STAGE 3 — IDEAL CLIENT — NWAM

Knowing exactly who you want to work with

Best-Practice Suggestion	Y	N	M
We have a written description of our ideal client — we can describe them in one sentence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our ideal client has a Genuine Need that we can solve better than anyone else	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our ideal client Wants the outcome we deliver — they value quality, not just price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our ideal client has the Authority to make the decision without checking with someone else	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our ideal client has the Means — their budget is realistic for the work they're asking for	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Every team member can clearly describe our ideal client when asked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our marketing and messaging speaks directly to our ideal client — not everyone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We regularly review our ideal client profile and update it as our business evolves	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What will I do to improve my IDEAL CLIENT — NWAM stage?	By when? / Who owns it?

STAGE 4 — PINTA — RED FLAG LIST

The clients and jobs you will no longer take

Best-Practice Suggestion	Y	N	M
We have a written list of the types of clients or jobs we will no longer accept	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We can confidently and politely say no to work that doesn't fit our business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We track patterns in our PINTA clients — what they have in common	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our team knows our PINTA list and is empowered to flag red flags early	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have a process for referring PINTA clients to someone else (rather than just saying no)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We no longer let guilt or fear of losing work cause us to take on the wrong clients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saying no to PINTA work has improved our profitability and reduced our stress	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We review our PINTA list regularly and add new red flags as we identify them	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What will I do to improve my PINTA — RED FLAG LIST stage?	By when? / Who owns it?

PINTA = Pain In The Arse

YOUR SUMMARY

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

OPENING	LWTAM — QUALIFY	IDEAL CLIENT — NWAM	PINTA — RED FLAG LIST
● ● ● ● ●	● ● ● ● ●	● ● ● ● ●	● ● ● ● ●
Biggest priority:	Biggest priority:	Biggest priority:	Biggest priority:

<p>My #1 priority from this workshop is:</p> <hr/> <hr/> <hr/>	<p>I will complete this by:</p> <hr/> <hr/>
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- 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.