

WORKSHOP 4

Converting the Meeting Into a Job

What happens between the call and the contract decides everything.

 30–45 MINUTES

"A proposal is not a sales tool. A WOW Pack is."

The Problem We're Solving

- Most service businesses send a proposal as a number on a page — and then wait.
- By the time the client receives it, they've forgotten the conversation.
- They've received two other quotes and have no reason to choose you.
- The conversion stage is where trust is built — or lost.
- The WOW Pack and the 8-step sequence change the equation completely.

PRE-MEETING SEQUENCE

Steps 1–4: Before you arrive



Confirmation email within 24hrs of every qualified enquiry



Email attaches 'Questions to Ask Any Provider' and our guarantee



Phone call 24hrs after email to confirm receipt and answer questions



Personalised day-before email referencing something specific about their project



Same-day confirmation text the morning of every meeting



Our text is warm and personal — not just a calendar reminder

THE WOW PACK

*Your most powerful trust-
building tool*

- ✓ We have a WOW Pack — a physical or digital leave-behind for every meeting
- ✓ About Us — our story, not just our credentials
- ✓ Why Choose Us — genuine points of difference, not generic claims
- ✓ Our Process — what working with us actually looks like, step by step
- ✓ Testimonials — at least 3, with specific outcomes (not generic praise)
- ✓ Our Guarantee — what we stand behind, in writing
- ✓ Questions to Ask Any Provider — positions us as the expert
- ✓ We leave our WOW Pack with every prospect — even if we don't win the job

POST-MEETING SEQUENCE

Steps 6–8: After you leave

- ✓ Same-day thank-you email with testimonials attached
- ✓ Proposal has a personalised cover letter — not just a price list
- ✓ Proposal clearly explains what is included and what is not
- ✓ We offer two options (standard and premium) where possible
- ✓ Proposal has a clear, simple acceptance process
- ✓ Phone call within 24hrs of sending: 'What did you think?' — then stop talking
- ✓ Every proposal goes into our follow-up sequence from day one

PROPOSAL QUALITY

Is your proposal a sales document or just a price list?



Our proposal tells a story — it connects the client's problem to our solution



Our proposal uses the client's own words from our earlier conversation



Our proposal is visually consistent with our brand — it looks professional



Our proposal makes the next step completely clear and easy to action



We have reviewed our proposal template in the last 6 months



We know our current proposal-to-job conversion rate



We continuously improve our proposal based on client feedback

WORKBOOK ACTIVITY — All 4 Sections

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 section — what, by when, who owns it.
- Circle your traffic light rating on the summary page.
- Key outputs: WOW Pack outline + an honest assessment of your current proposal.

YOUR ACTION THIS WEEK

1 Collect three client testimonials — email five past clients and ask for one sentence.

2 Draft the outline of your WOW Pack. Assign one section to complete before next session.

3 Review your current proposal template: does it tell a story, or just list numbers?



GO DEEPER — WEBSITE RESOURCES

Awesome Testimonials (CONVERT) — A simple way to get awesome testimonials to attract, convert and retain more clients.

Creating a Powerful Guarantee (CONVERT) — A guarantee makes your marketing easier and your conversion rates better.

Capability Statements (ATTRACT) — Outlines what you offer and helps clients decide whether to do business with you.

Lead Magnets & Why Papers (ATTRACT) — Position yourself as the expert so you can make more sales quickly and easily.

Charging For Quotes (CONVERT) — Convey the value of a detailed proposal and increase conversion rates.