

BUSINESS MAXIMISER COACHING

WORKSHOP 4 — WORKBOOK

Converting the Meeting Into a Job

What happens between the call and the contract decides everything.

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 — PRE-MEETING SEQUENCE

Steps 1–4: Before you arrive

Best-Practice Suggestion	Y	N	M
We send a confirmation email within 24 hours of every qualified enquiry	☐	☐	☐
Our confirmation email attaches a 'Questions to Ask Any Provider' document	☐	☐	☐
Our confirmation email attaches or mentions our guarantee	☐	☐	☐
We call 24 hours after the email to confirm receipt and check for questions	☐	☐	☐
We send a personalised day-before email with our meeting time and a 'Things to Consider' document	☐	☐	☐
Our day-before email is personalised — it references something specific about their project	☐	☐	☐
We send a same-day confirmation text the morning of every meeting	☐	☐	☐
Our text is warm and personal — not just a calendar reminder	☐	☐	☐

What will I do to improve my PRE-MEETING SEQUENCE stage?	By when? / Who owns it?

THE WOW PACK

Your most powerful trust-building tool

Best-Practice Suggestion	Y	N	M
We have a WOW Pack — a physical or digital leave-behind for every meeting	☐	☐	☐
Our WOW Pack has an 'About Us' section that tells our story, not just our credentials	☐	☐	☐
Our WOW Pack has a 'Why Choose Us' section with genuine points of difference	☐	☐	☐
Our WOW Pack has an 'Our Process' section showing clients what working with us looks like	☐	☐	☐
Our WOW Pack has at least 3 testimonials with specific outcomes — not generic praise	☐	☐	☐
Our WOW Pack has a written guarantee that we stand behind in writing	☐	☐	☐
Our WOW Pack has 'Questions to Ask Any Provider' that educate and position us as the expert	☐	☐	☐
We leave our WOW Pack with every prospect — even if we don't win the job	☐	☐	☐
Our WOW Pack is professionally presented and consistent with our brand	☐	☐	☐
We update our WOW Pack at least quarterly with new testimonials and content	☐	☐	☐

What will I do to improve my THE WOW PACK stage?	By when? / Who owns it?

STAGE 3 — POST-MEETING SEQUENCE

Steps 6–8: After you leave

Best-Practice Suggestion	Y	N	M
We send a thank-you email the same day as every meeting	☐	☐	☐
Our thank-you email attaches testimonials — in case the decision-maker wasn't at the meeting	☐	☐	☐
Every proposal has a personalised cover letter — not just a price list	☐	☐	☐
Our proposal clearly explains what is included and what is not	☐	☐	☐
Our proposal references our guarantee and our process	☐	☐	☐
We offer two options in our proposal (standard and premium) where possible	☐	☐	☐
Our proposal has a clear, simple acceptance process — clients know exactly how to say yes	☐	☐	☐
We call within 24 hours of sending every proposal: 'What did you think?'	☐	☐	☐
After asking the question, we stop talking and let them respond	☐	☐	☐
We track every proposal we send and follow a structured follow-up sequence from day one	☐	☐	☐

What will I do to improve my POST-MEETING SEQUENCE stage?	By when? / Who owns it?

STAGE 4 — PROPOSAL QUALITY

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

Best-Practice Suggestion	Y	N	M
Our proposal tells a story — it connects the client's problem to our solution	☐	☐	☐
Our proposal is visually consistent with our brand — it looks professional	☐	☐	☐
Our proposal uses the client's own words from our earlier conversation	☐	☐	☐
Our proposal makes the next step completely clear and easy to action	☐	☐	☐
We have reviewed our proposal template in the last 6 months	☐	☐	☐
We have asked past clients what they liked and disliked about our proposals	☐	☐	☐
We know our current proposal-to-job conversion rate	☐	☐	☐
We have a process for continuously improving our proposal based on feedback	☐	☐	☐

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

YOUR SUMMARY

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

PRE-MEETING SEQUENCE	THE WOW PACK	POST-MEETING SEQUENCE	PROPOSAL QUALITY
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. Collect three client testimonials — email five past clients and ask for one sentence about their experience.
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?