BUSINESS MAXIMISER COACHING

WORKSHOP 7 — WORKBOOK

Closing, Committing & Measuring

A sale isn't a sale until the deposit is in and the start date is locked.

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 — CLOSING MINDSET

Closing is a service — not a manipulation

Best-Practice Suggestion	Y	N	M
I understand that closing is professionally helping someone make a decision	☐	☐	☐
I am comfortable asking for the business directly — without hesitation or apology	☐	☐	☐
I know that silence after a closing question is productive — not awkward	☐	☐	☐
I never close before the client is ready — I read the conversation first	☐	☐	☐
I have at least 3 different closing approaches that I am comfortable using	☐	☐	☐
I adapt my closing style to the person — not every client needs the same approach	☐	☐	☐
My confidence in closing comes from confidence in my offer — not just my personality	☐	☐	☐
I know that a weak close is a disservice to a client who genuinely needs my help	☐	☐	☐

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

CLOSING SCRIPTS

The exact words that turn agreement into action

Best-Practice Suggestion	Y	N	M
I use the Summary Close: 'Based on what you've told me... would you like to go ahead?'	☐	☐	☐
I use the Assumptive Close: 'The next step is a signed agreement and deposit — I can send that today'	☐	☐	☐
I use the Recommendation Close: 'Based on everything we've discussed, I'd recommend...'	☐	☐	☐
I use the Decision-Maker Close to ensure I have the right people at the table	☐	☐	☐
I have practised each closing script until it sounds natural — not rehearsed	☐	☐	☐
I use the correct close for the situation — I don't use the same one every time	☐	☐	☐
After asking a closing question, I stop talking and wait for their answer	☐	☐	☐
I have a process for what happens if they don't respond or ask for more time	☐	☐	☐

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

STAGE 3 — THE COMMITMENT CHECKLIST

A job is not committed until all boxes are ticked

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 agreed by both parties	☐	☐	☐
We complete a pre-start checklist before every job begins	☐	☐	☐
Every committed client is briefed on exactly what happens next and when	☐	☐	☐
Every new job is entered into our tracking system before work begins	☐	☐	☐
We never start work on a verbal yes — always a signed agreement and cleared deposit	☐	☐	☐
Our commitment process is consistent — it doesn't change based on who the client is	☐	☐	☐

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

STAGE 4 — MEASURING YOUR PIPELINE

The numbers that drive improvement

Best-Practice Suggestion	Y	N	M
We track the number of enquiries received each week	☐	☐	☐
We track the number of proposals sent each week	☐	☐	☐
We track our conversion rate — proposals sent vs jobs won	☐	☐	☐
We track the average value of the jobs we convert	☐	☐	☐
We review our pipeline numbers at least once a week	☐	☐	☐
We know our conversion rate for the last 90 days	☐	☐	☐
We know which stage of our sales flow produces the most lost opportunities	☐	☐	☐
We have set a target conversion rate and know what we need to improve to hit it	☐	☐	☐
We use our pipeline data to make decisions — not gut feel	☐	☐	☐
Our pipeline numbers are visible to the team — not just the owner	☐	☐	☐

What will I do to improve my MEASURING YOUR PIPELINE stage?	By when? / Who owns it?

YOUR SUMMARY

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

CLOSING MINDSET	CLOSING SCRIPTS	THE COMMITMENT CHECKLIST	MEASURING YOUR PIPELINE
🟢 🟡 🟠 🔴	🟢 🟡 🟠 🔴	🟢 🟡 🟠 🔴	🟢 🟡 🟠 🔴
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. Run your pipeline numbers for the last 90 days and calculate your conversion rate.
2. Pick the one stage in your sales flow where you will make the biggest improvement in the next 30 days.
3. Book a 30-minute review session with Sam to walk through your completed sales system.