

## Sales Staircase™ Worksheet Example

Use this as an example.

CHOOSE	CONNECT	CONVERSE	CONFIRM	CLARIFY	CREATE	COMMENCE	CONTINUE	CHAMPION
Strategic Segment	Channels	Create Change	Confirm Call	Discovery Meeting	Options Presentation	Strong Onboarding	Acknowledged Success	Annual Events
Client Circumstances	Become Known	Curious Conversation	Confirm Fit	Uncover Value	Stack Value	Clear Expectations	Improve Condition	Extend Opportunities
I am relevant to them because...	I connect to them by...	I can engage with them by...	I can classify their fit by...	I can clarify their value by...	I help them stack the value by...	I help them feel good about starting by...	I help them build momentum by...	I can help them master this by...
<ul style="list-style-type: none"> <li>• Values &amp; Strengths</li> <li>• Experience &amp; Expertise</li> <li>• Reachability</li> </ul>	<ul style="list-style-type: none"> <li>• Talks</li> <li>• Videos</li> <li>• Direct mail</li> <li>• Intros or Referrals</li> <li>• Calls</li> <li>• LinkedIn</li> </ul>	<ul style="list-style-type: none"> <li>• Ask for input</li> <li>• Ask for reply</li> <li>• Meeting</li> <li>• Event</li> <li>• Volunteer</li> </ul>	<ul style="list-style-type: none"> <li>• Question &amp; Coach</li> </ul>	<ul style="list-style-type: none"> <li>• Question &amp; Coach</li> </ul>	<ul style="list-style-type: none"> <li>• Question &amp; Coach</li> </ul>	<ul style="list-style-type: none"> <li>• Specific goals</li> <li>• Good deadline</li> <li>• Prepare to start</li> <li>• Address the warts</li> </ul>	<ul style="list-style-type: none"> <li>• Dashboard Metrics</li> <li>• Annual goal session</li> <li>• Quarterly projects</li> <li>• Intentionally inspire</li> <li>• Flexible format</li> </ul>	<ul style="list-style-type: none"> <li>• Define champion</li> <li>• Share big vision</li> <li>• Create events to work towards together.</li> </ul>
Private Health Care: <ul style="list-style-type: none"> <li>• Private doctors</li> <li>• Dentists</li> <li>• Chiropractors</li> <li>• Physio</li> <li>• Therapists</li> </ul>	<ul style="list-style-type: none"> <li>• Talks for Strategic Alliance Partners</li> </ul>	<ul style="list-style-type: none"> <li>• Talks / workshops / videos / articles</li> <li>• 5 Questions</li> <li>• Do</li> <li>• Success</li> <li>• Different</li> <li>• Excited</li> <li>• Keys</li> <li>• Offer- Call or LM</li> </ul>	<ul style="list-style-type: none"> <li>• Qualifying call to filter out bad fit</li> <li>• Positioning for SBR</li> <li>• Uncover if there is a WANT large enough justify engagement</li> </ul>	<ul style="list-style-type: none"> <li>• Find out how they will evaluate success, what value it is and what impact of failure is.</li> </ul>	<ul style="list-style-type: none"> <li>• Client Profile Questionnaire</li> <li>• 20 Min Call Notes</li> <li>• Research</li> </ul>	<ul style="list-style-type: none"> <li>• Launch Session</li> <li>• 12 month goals with metrics</li> <li>• 90 day goals with metrics</li> <li>• where will we struggle</li> <li>• what to do when we struggle</li> </ul>	<ul style="list-style-type: none"> <li>• Identify areas of inspiration</li> <li>• Assist in plans for inspiring goals</li> <li>• Send materials or messages that relate</li> <li>• Give introductions to key people</li> </ul>	<ul style="list-style-type: none"> <li>• Destination Event</li> </ul>
They want: <ul style="list-style-type: none"> <li>• Bill more (#/\$)</li> <li>• Exposure</li> <li>• New clients</li> </ul>	Possible SAP: <ul style="list-style-type: none"> <li>• Suppliers</li> <li>• Association</li> <li>• Trade shows</li> <li>• Bankers</li> <li>• Lawyers</li> <li>• Accountants</li> <li>• Software providers</li> </ul>	<ul style="list-style-type: none"> <li>• Invite to workshop</li> <li>• Record event</li> <li>• Post video &amp; transcription to site</li> <li>• Email updates to clients</li> <li>• CTA- comment, email, or call with questions.</li> <li>• CTA- additional resources</li> </ul>	Why me & now? <ul style="list-style-type: none"> <li>• Results</li> <li>• Reality</li> <li>• Roadblocks</li> <li>• Summary</li> </ul> Decide: <ul style="list-style-type: none"> <li>• No - refer away</li> <li>• Yes - book SBR</li> </ul>	<ul style="list-style-type: none"> <li>• Results</li> <li>• Reality</li> <li>• Roadblocks</li> <li>• Confirm currency</li> <li>• Stretch gap</li> <li>• Remove objections</li> </ul>	Coach the close: <ul style="list-style-type: none"> <li>• Summarize Issues</li> <li>• Agree to concepts</li> <li>• Agree to USP</li> <li>• Explain model</li> <li>• Bucket the Details</li> <li>• Pricing</li> <li>• START (12m &amp; 90d)</li> </ul>	<ul style="list-style-type: none"> <li>• 1 page game plan</li> <li>• book 90 review session</li> <li>• set calendar for 90 days</li> <li>• review support methods</li> <li>• clear expectations</li> <li>• get confirmation of commitment</li> </ul>	High Performance Planning: <ul style="list-style-type: none"> <li>• Have celebrity guest</li> <li>• Make it experiential</li> </ul> Full Day Conference: <ul style="list-style-type: none"> <li>• Stanley Cup Champion speaker</li> </ul>	Maui Mastermind: <ul style="list-style-type: none"> <li>• 5 couples for 3 days in Ka'anapali</li> </ul>
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## Sales Staircase™ Worksheet

Use this worksheet to organize your actions at each step of the Sales Staircase™ that will serve customers where they are at and prepare them for the next step.

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Strategy:	Strategy:	Strategy:	Strategy:	Strategy:	Strategy:	Strategy:	Strategy:	Strategy:
Tactics:	Tactics:	Tactics:	Tactics:	Tactics:	Tactics:	Tactics:	Tactics:	Tactics:
Results:	Results:	Results:	Results:	Results:	Results:	Results:	Results:	Results:
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