

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

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: |
| CULTIVATE | | | | | | | | |