



## **Katrina Sawa's Confident Close Sales Conversation Cheat Sheet and Call Outline:**

### **Big Picture (Simple) Outline on What To Do**

1. (Pre-Call) Prequalify Prospects
2. Set Boundaries & Expectations
3. Build Rapport
4. Let them share their goals, vision, desires, challenges
5. Have them get to know you a little more
6. Get curious with them, ASK
7. Uncover the gap of where they are to where they want to be – they need to see it
8. Find out their level of motivation to fix their issues or resolve problems
9. Then ask if they want to know how you can help or how they can work with you (if no, stop)
10. Share your solutions / options
11. Ask them to take the next step
12. Dance with objections or concerns
13. Enroll them and get them engaged/started right away
14. Follow up with deliverables, next steps
15. Add them to your customer enrollment process

### **Detailed Outline on What To Do**

1. (Pre-Call) Prequalify prospects with a strategically designed questionnaire, evaluation form, assessment or application on a webpage BEFORE you get on the call with them and ideally before they GET to your calendar to schedule... this way too you can 'get them on the list'. I also recommend asking for FULL CONTACT info on that form so you can follow up in other ways other than just email if they don't schedule or no show on you. Make sure your webpages where you place your questionnaires have a video of you talking about why they want to come to this call, what they'll get out of it, how to prepare and important things to know such as bringing significant other to the call if they help make decisions. Ensure you get on the phone with more qualified prospects, people who are open to a conversation about buying, interested in talking through their needs, etc. Get details such as their big picture goals, what challenges

they're having, what questions they have, who else or what else they've invested in regarding what you do and how motivated they are to solve/fix/relieve their problem.

- a. Have a clear system to get them into an appointment and ensure they show up (send reminder emails or notifications from yourself or your scheduling system if you have one). You can also leave a voicemail or text if you tend to get a lot of no shows.
2. Set Boundaries & Expectations – when you start the call, make sure you set the expectations for what this call is for, what they can expect, how long it might be, depending, and that your goal is to help them come to a decision perhaps if or how they can get support with you.
3. Build rapport quickly with questions on the call and get curious – YOU take control but let them tell you about them for a little bit up front. Ideally have them share why they're here, why they decided to invest their time to speak with you.
4. Uncover the gap. What are their biggest challenges with xyz?
  - a. What else have they tried, invested in, wasted time or \$ with, and at what level of success have they had?
  - b. Why now? Are they ready to have what they say they want?
  - c. Are they willing to take the necessary action to get them there or will they revert back to what's comfortable? (talks to their motivation)
5. Share more about you if they don't know you well, telling stories of others you've helped and how.
6. Then ask if they want to know how you can help or how they can work with you (if no, stop)
7. Offer a solution or options – Invite them to participate, take action with you, join, become a part of your program, etc. I like to give 2 options, a this or that so they can choose and not just say yes or no. Ideally, one is much higher than the other – start high, then go low.
8. Remain neutral with no pressure while they decide or have more questions.
9. If objections or rebuttals, bring them back to what they say they want, what their current challenges are, their pain, what they've tried & why it hasn't worked. Ask: 'What is your plan if it's not this?' or 'If not now then when?' or 'if not me, then who?'
16. Ask them to make a decision today – offer incentives or bonuses to make it irresistible today.
17. If resounding no, then get them started somewhere with something else (this or that)! Or make a follow up appointment to discuss their thoughts after they have time to think about it. (if they don't do this, they will most likely never sign up) But scheduling a follow up call to discuss the offers is a great next step. Just do not email options, links to sales pages or more info. Always discuss options for a next step ON the call or schedule a second call. But don't just schedule a second call because you coached them too much on first one. They won't buy the milk if you give them the milk.
18. If they say they're interested but may need to wait a few days or weeks to start, ask to take their credit card today and then you won't charge it til \_\_\_day, if they don't contact you to cancel, you'll get them started then. That way you both don't have to waste time scheduling another call if they're a yes, they just need to wait to start. You can also book or schedule your first call if it's a paid 1on1. But I would not send them details and components of a program until you receive payment. They are NOT a YES until you have the money or at least the first payment.

19. Seal the deal, hold them to the commitment and get them started with an assignment, homework, something to do, etc. right away to engage them. Share expectations towards the end on how you work, what you expect from them, etc. so you everything is clear upfront. Follow up immediately so they feel valued with an auto email and more details or have a client onboarding hidden webpage to get more info, or give them some indication that you're grateful for having them choose you to work with them.

## Reminder: 7 Modules of The Confident Close Framework: Scripts, Shifts & Strategies to Close More Deals with Values-Aligned, Authentic Language

[And notes from the masterclass are here.](#)

This is the graphic for the 8 types of Sales Strategies:



## Then finally... your NEXT Steps!!!

Want to attend one of my LIVE or VIRTUAL trainings, workshops or retreats? Go learn when they are and more about what's coming up here:

[www.JumpstartEvents.net](http://www.JumpstartEvents.net)

Want to have a 1on1 Clarity Call with me to discuss coaching and support options so you can achieve your goals FASTER? [Schedule that here.](#)

## Who the Heck ARE You, Katrina?



Katrina Sawa has been known as the Jumpstart Your Biz Coach since 2005 when she first rebranded her consulting business into the Jumpstart Your Marketing brand. She used that for 12 or so years until she realized that **she helps entrepreneurs with WAY more than just marketing**. And also, because she works with you at ANY level in your business, not just startups.

Katrina helps entrepreneurs make more money doing what they love. She is the creator of the Jumpstart Your Marketing & Sales System, a tell-it-like-it-is speaker and International Best-Selling author with 22 books including her two most popular books: Jumpstart Your New Business Now, and Love Yourself Successful.

She has been featured on the Oprah and Friends XMRadioNetwork, ABC, TheCW, the LA Tribune and she's hosted over 35 in person and virtual events.

Katrina is also the CEO of Jumpstart Publishing where she helps 30-70 authors each year get their books published and become best-sellers.

## Why Listen to Me?



"I decided to work with Katrina after her 3 day event, even though I went to the event with no intention of hiring a coach. I liked her business knowledge and her desire to help her clients succeed in their business. I have found while working with her for the last year, I continue to learn an incredible amount. She is constantly learning the latest business techniques and she freely gives this knowledge to her clients. My confidence has increased substantially since I have worked with Katrina and I consistently stretch out of my comfort zone. My business has transformed in ways I could have never imagined and she continues to help me with new ideas. I encourage anyone who is interested in growing their business and making their business more sustainable and fun- call Katrina."

**Kim McLaughlin**

MA, [www.FeedYourSoulUnlimited.com](http://www.FeedYourSoulUnlimited.com)



"In the time that I have been in the Live Big Mastermind I have created a steady stream of 1on1 clients, speaking opportunities, written 1 book myself and been a co-author in 3 others AND created an online course. I relied on Katrina's clear instructions and each step of the way to create a foundation for success. I've been able to hire 2 VA's to delegate the things I don't want to do to be able to do all the things I love to do! ***I am on my way to a 6+ figure business and this would not have been possible without Live Big Mastermind and Katrina Sawa!***"

**Michele Mariscal**

PhD, [Energym.org](http://Energym.org)



"Katrina's straightforward approach gives you options and tools to make it easy to understand parts of your business. Her approach not only makes it easy but she tells you the mistakes she made and what did not work. Katrina will save you hundreds of hours of research, money and frustration on systems. She is the expert on internet marketing, video webinars, radio, and she will teach you how to be mobile so you can literally can operate and conduct business from anywhere. She can assist from networking to speaking events. She will show you how to be effective at marketing events to following up on after event. Katrina's step by step process takes the overwhelmed feeling away. She is the master of Social Media to assisting in website. Hire Katrina Sawa for your business coach."

**Helen Justice**

Geriatric Care Manager, [AdvancedWellnessGCM.com](http://AdvancedWellnessGCM.com)



"Katrina Sawa is a more than just a business coach, she is a mentor. Katrina has taught me marketing strategies that WORK! In just a few months, I implemented a long over-due email campaign, created new products, sold new services and made connections with more clients than ever before. Katrina is someone I trust completely to guide me in my business offerings and I highly recommend her."

**Alicia White**

Branding Strategist for Speakers, [www.SpeakerSheets.com](http://www.SpeakerSheets.com)

## FAQ

### ^ Deciding between me and this or another mentor and program?

There is no one out there that knows and/or teaches you about as many different aspects of running, growing and scaling a business that I do. I know offline marketing, networking, speaking, direct mail, advertising, phone call strategy, 1on1 sales, coaching, AND online marketing, courses, memberships, marketing, video, PLUS all the back end systems, CRM automation, database marketing, follow up and nurturing, funnels. AND I know how to delegate it, get publicity, speak and host events or speak to sell, run radio shows and podcasts, write and publish books, do book tours and SO much more.

### ^ Don't think you're ready for this yet?

You can't get this education anywhere, not in school, free webinars, summits, or even my peer's courses and trainings because I work on your entire business with you, not just pieces of it. So everything you're doing flows together and works like a smooth running, lead generating, moneymaking machine.

What that takes sometimes is really looking at everything in your business – the BIG Picture – and figuring out where the holes are, the opportunities are and basically what else is possible for you that you may not have thought of before. Now, you, being so close to what you do in your business, may not necessarily be able to see all this clearly yourself which is why you're probably on this page [now](#). It is easy to work IN your business be completely blind to opportunities right in front of your face that could literally make you thousands more dollars each month or each year depending on your [business](#). It's NOT easy to find or remember to take the time to work ON your business however.

You need to learn HOW TO BE A PROFITABLE ENTREPRENEUR plain and simple. And why not now vs a year or more from now? If not this, what will you do? If not me, then who will you work with?