



SALES TOOLKIT FOR SUCCESS



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BE SALES READY AT EVERY STAGE

Key Takeaways

- Understanding the importance of a Sales Toolkit
- Knowing the key components needed for results and how to spot any gaps
- The confidence and knowledge to create your own Sales Toolkit

What did you learn from the masterclass?

1

2

3

What did you implement in your business from the masterclass?

1

2

3

What results have you had from your actions?

1

2

3



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How many boxes do you tick?

TOOLKIT CHECKLIST

- | | |
|--|---------------------------------------|
| ☐ Prospect Form | ☐ Call Sheet |
| ☐ Success Story | ☐ Case Study |
| ☐ Brochure | ☐ Fact Sheet |
| ☐ How you Work | ☐ Your Clients |
| ☐ On-boarding | ☐ T's and C's |
| ☐ Referrals | ☐ Feedback |
| ☐ Proposal | ☐ Promo Video |
| ☐ Team Bio's | ☐ Contract |
| ☐ Special Offer | ☐ Satisfaction |



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How did you do?



Don't panic, sky's the limit for you....

Get excited, time to ramp up

Buckle up, you're almost there!

Now lets make a plan to get you where you need to be!



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Personal Brainstorm

Take some time to plan your Sales Toolkit. What is important to include? What do you already have? What more do you need? Think about your:

- Sales strategy & targets
- The services, products and packages you sell
- Past, current and future clients

Based on your score what do you need to develop for your toolkit?

Map out, when, what and how you are going to do this.



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Common Sales Challenges

- ☐ Repeat Business
- ☐ Discovery Calls
- ☐ Sales Process
- ☐ Referrals
- ☐ Confidence
- ☐ Follow up
- ☐ Upselling
- ☐ Sales Calls
- ☐ Sales Proposals
- ☐ Overwhelm



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Your Sales Challenges

- ☐
- ☐
- ☐
- ☐
- ☐
- ☐
- ☐
- ☐
- ☐



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Why do I need a Sales Toolkit?

- ☐ To be organised
- ☐ To have a system
- ☐ To work smarter
- ☐ To follow a process
- ☐ To be prepared
- ☐ To be in service
- ☐ To give more value
- ☐ To have fewer surprises
- ☐ To be memorable
- ☐ To show up
- ☐ To be consistent



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Example Client Journey

STAGE	TOUCH POINTS	RESOURCE
LEAD - IN	EMAIL/CALL SOCIAL MEDIA WEBSITE REFERRAL	CRM CALL SHEET BROCHURE
NEEDS ASSESSED	PHONE CALL ONLINE MTG F2F MTG	CRM PROSPECT FORM CLIENT STORIES
PRESENT SOLUTION	PHONE CALL ONLINE MTG F2F MTG	PITCH DECK PROPOSAL CUSTOMER STORIES
INFLUENCE BUYING	EMAIL	PROPOSAL REVIEWS CASE STUDIES TESTIMONIALS
MAKE THE SALE (OR NOT)	PHONE CALL ONLINE MTG F2F MTG	NEXT STEPS ONBOARDING CONTRACT T&CS
AFTER SALES	PHONE CALL ONLINE MTG F2F MTG	FEEDBACK TESTIMONIAL NEXT STEPS UPSELL
NURTURE	PHONE CALL ONLINE MTG F2F MTG	NEWSLETTER EVENTS/ ARTICLES SPECIAL OFFERS

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What actions do you need to do build your own Sales Toolkit

What Toolkit component is a priority for you?

What do you need in place to achieve this?

What is not negotiable for you to ensure success?

To your success



ADDITIONAL SUPPORT

DON'T STRUGGLE ON YOUR OWN



GET IN TOUCH

