Sales and Proposal Toolkit

The sales path, the leak finder, the quote, the follow-up, and the words for hard moments.

2026-09-21_VEC_S05_Sales_and_Proposal_Toolkit.pdf

BLUF, BOTTOM LINE UP FRONT

Sales is helping someone decide. Leave tonight able to send a real quote within 24 hours of a conversation.

1. The sales path

Lead, Conversation, Quote, Follow-Up, Yes, Paid. Session 4 was Know and Trust. Tonight is the rest of the path.

- Lead: someone raises a hand (text, church hallway, referral, form).
- Conversation: ask, listen, write their words down.
- Quote: write what you will do, the price, and the next step. Within 24 hours.
- Follow-Up: a rhythm until you get a clear yes or a clear no.
- Yes: they say go. Confirm in writing.
- Paid: deposit in, invoice out, money in the business account.

2. Find the leak before you chase more leads

What happened	Likely leak
They asked "how much?" and you guessed low on the spot	Conversation (quoted too soon)
Good talk, then silence	Quote never written
You sent one message and waited	Follow-up
They said "let me think" and you said "sure"	The ask (no date)
You did the work and are still unpaid	Paid (no deposit or invoice)

3. When they ask "how much?"

- Fixed price (cake, package, session): say the number, what it includes, then stop talking.
- Custom work: do not quote on the spot. Ask the five questions, then: "Let me write it up on one page. I will have it to you by tomorrow night."
- What is going on that made you reach out now?
- What have you already tried?
- What would solved look like for you?
- When do you need it, and what happens if nothing changes?
- Have you set aside a budget, or would a range help?

Say the price, then stop. Silence is math, not a no. If they want less money, remove scope. Never cut the price for the same work. Church family pays the same price; offer a smaller option, not a secret discount.

4. The six-block quote (one page)

- Their situation, in their words (their name before yours).
- What I will do (numbered steps; say "will," not "can").
- Price, includes, excludes, deposit, when the balance is due.
- Timeline: start and finish.
- Why me: two or three provable reasons only.
- Next step and expiration date.

Give a choice between yeses: Good / Better / Best, then recommend one in one sentence. Three sizes: text-message quote, one-page proposal, formal proposal (Session 6).

5. Follow-up rhythm (five touches, thirty days)

- Same day: quote attached. "Reply here with any questions."
- Day 3: "Any questions? Happy to walk through it in five minutes."
- Day 7: give something useful. No ask.
- Day 14: "Where does it stand? Price holds through [date]."
- Day 30: door stays open; ask for an introduction if they went another way.

6. Words for the five hard moments

They say	You say
Church discount? We're family.	I would love to serve you. My price is the same for everyone so I can keep serving. If budget is tight, here is the smaller option.
Too expensive.	Compared to what you had in mind? Which part matters most? Then trim scope, not the same work for less.
Let me think about it.	Of course. What would you need to know to decide? Can I check back Thursday?
We already have someone.	Glad you are covered. May I send my one-pager so I can be your second call?
Not right now.	Understood. When is better, and may I follow up then?

7. Five questions before you say yes

- Do I know this person, or am I a stranger?
- Can I do this well with what I have today?
- Does it pay?
- How many others are chasing it?
- Do I have time to do the quote right?

Two or more no answers means kindly decline and go win the job you should. Count your nets: leads, conversations, quotes sent, yeses, win rate (yeses divided by quotes).

This week: send one real quote to one real person within 24 hours of the conversation. If you only do one thing, do that.