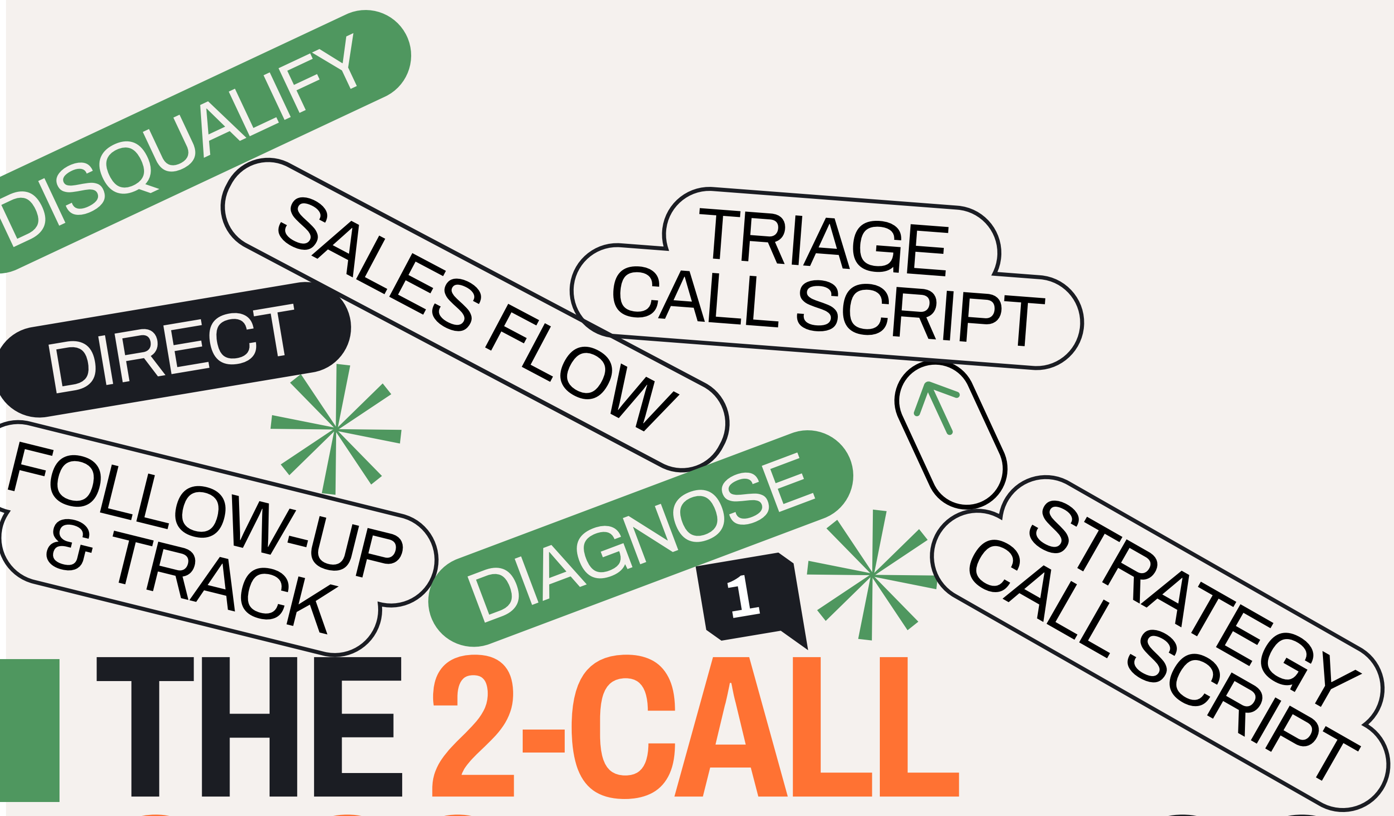

THE 2-CALL CLOSE PLAYBOOK

Turn conversations into conversions.

MAP YOUR SALES FLOW — FIND THE CRACKS KILLING YOUR CONVERSIONS

SQUARE 1 GROUP

YOU CAN'T FIX WHAT YOU DON'T MEASURE. IF CALLS AREN'T CLOSING, YOUR PROCESS IS BROKEN SOMEWHERE — LET'S FIND OUT WHERE.

SALES FLOW

INSTRUCTIONS:

Before you build your 2-Call Close System, you need to know how the hell leads actually move through your sales flow right now.

Most solopreneurs never document this, so they repeat the same mistakes over and over.

This worksheet forces you to see your entire pipeline from first contact → follow-up and pinpoint the weak links.

By the end, you'll know:

1. Where leads are leaking
2. Which conversations never convert
3. What needs fixing first

Grab a pen, pull up your CRM or spreadsheet, and get brutally honest.

THE GUIDE:

STEP 1:
Name Your Offer

Fill in the blank:
I sell __________ to __________.

Example: "Marketing systems to real-estate agents."

STEP 2:
Define Your Lead Entry Points

Fill in the blank:
Most of my leads come from __________.

Example: "Facebook ads and referrals."

STEP 3:
Outline Your Current Sales Flow

Write each step in order:
Lead → Intro Message → Call 1 → Call 2 → Follow-Up → Close
Fill in how each actually happens today.

Example: "Lead opts in → manual email → Zoom call → no follow-up."

STEP 4:
Track Your Numbers

Fill in the blanks (based on your last month or quarter):

Leads generated: _____
Calls booked: _____
Calls attended: _____
Deals closed: _____
Close rate = (Deals Closed ÷ Calls Attended) × 100 = ____ %

STEP 5:
Identify the Biggest Leak

Where do most leads die?

- ☐ Don't book a call
- ☐ Don't show up
- ☐ Don't convert after the call
- ☐ Ghost after follow-up
- ☐ Other: __________

STEP 6:
Diagnose the Reason

Fill in the blank:
This happens because __________.

Example: "I don't qualify hard enough before booking."

STEP 7:
Audit Your Current Call Structure

Answer honestly:

1. How long is your average call? _____ min
2. Do you follow a framework or wing it?
   - ☐ Framework
   - ☐ Winging It
3. What percent of the time do you make an offer on the first call? _____ %

STEP 8:
Spot Your Strengths

Fill in the blank:
The part of my sales process I'm best at is __________.

Example: "Building rapport quickly."

STEP 9:
Spot Your Weaknesses

Fill in the blank:
The part that needs the most work is __________.

Example: "Handling objections without getting defensive."

STEP 10:
Define Your Fix Priority

Fill in the blank:
If I could fix one part of my sales flow this week, it would be __________.

Example: "Having a repeatable structure for my strategy calls."

Why It's Important:

You can't systemize chaos. Mapping your current sales flow gives you the raw data to build the 2-Call Close around what's actually happening — not what you think is happening. Today is about awareness. Tomorrow is about structure.

Need help auditing your sales flow in real time? Book a free strategy session:

square1grp.com/brainstormsession

You've found your leaks.

Tomorrow, we'll start plugging them by building your Triage Call Script — the 15-minute call that qualifies the right leads and kills the time-wasters.

BUILD YOUR TRIAGE CALL SCRIPT — QUALIFY FAST, BOOK SMARTER

SQUARE 1 GROUP

STOP WASTING TIME ON "CURIOUS" LEADS.
THIS 15-MINUTE CALL FILTERS WHO'S SERIOUS AND WHO'S NOT.

TRIAGE CALL SCRIPT

INSTRUCTIONS:

Yesterday, you mapped your sales flow and found the leaks.
Today, we're plugging the first one — **bad fits eating your calendar.**

The Triage Call is your first defense line.
Its job isn't to sell. It's to **diagnose, disqualify, and direct.**

By the end of this worksheet, you'll have a complete, repeatable 15-minute script you can use to qualify leads like a pro and set up your Strategy Call to close.

THE GUIDE:

STEP 1:
Clarify Your Goal

Fill in the blank:
The goal of my Triage Call is to __________.

Example: "Identify fit and book qualified leads for a Strategy Call."

STEP 2:
Set Your Frame (30 sec)

Say something like:
"Hey [name], thanks for taking a few minutes to chat. This call's quick — I just want to learn a bit about you and see if what we do can help. Sound good?"

- ☐ Keeps you in control.
- ☐ Signals you're selective.

STEP 3:
Ask Discovery Questions (5 min)

Use these core five to start:

1. "What made you reach out today?"
2. "What are you currently doing to solve this problem?"
3. "How long have you been dealing with it?"
4. "What's the impact if you don't fix it?"
5. "If you could wave a wand and solve this in 90 days, what would that look like?"

Fill in the blank:
The #1 question I'll add for my specific avatar is __________.

Example: "What does your client acquisition process look like right now?"

STEP 4:
Identify Decision Power (2 min)

Fill in the blank:
Before I book a Strategy Call, I need to confirm __________.

Example: "They have authority to say yes and a budget for marketing."

Use the line:
"If we find a fit, are you the one making the final decision on this?"

STEP 5:
Check Readiness (1 min)

Multiple choice:
On a scale of 1–5, where is this lead?

- ☐ 1 = Just browsing
- ☐ 2 = Mild interest
- ☐ 3 = Looking soon
- ☐ 4 = Actively shopping
- ☐ 5 = Ready to buy now

Fill in the blank:
I only move to a Strategy Call if they're a __________ or higher.

STEP 6:
Bridge the Gap (2 min)

After you've heard their pain, say:
"Based on what you've shared, I can see a few ways we could help. If you'd like, we can set up a longer call to map it out in detail — no pressure. Sound good?"

This shifts the energy from sales pitch to professional prescription.

STEP 7:
Book the Next Call (2 min)

Fill in the blank:
My preferred Strategy Call booking link is __________.
(Example: Calendly / Google Meet / Zoom.)

- ☐ Book before ending the call.
- ☐ Send confirmation email immediately.

STEP 8:
Set Expectations for the Next Call

Say:
"Awesome — for our next call, I'll share some recommendations based on your goals and walk you through what it'd look like to work together. Fair?"

- ☐ Frames you as a guide.
- ☐ Eliminates surprises.

STEP 9:
Tag and Track

Fill in the blank:
After each Triage Call, I tag the lead as __________.

Example: "Qualified," "Not Ready," or "No Fit."

Use a simple Google Sheet or CRM column to track fit % and next step.

STEP 10:
Refine Your Script

Record the next 3 Triage Calls and review these questions:

1. Did I control the frame?
2. Did I get clear on pain and decision power?
3. Did I transition smoothly to the Strategy Call?

Fill in the blank:
My biggest improvement for next time is __________.

Why It's Important:

Most people lose sales before the pitch even happens. This call makes sure you're only selling to people who can say yes — and it builds massive authority before you've even shared your offer.

Want help reviewing your script or call recordings?
Book a free strategy session:

square1grp.com/brainstormsession

You've just built the first half of your 2-Call Close System.

Tomorrow, we'll create your Strategy Call Script — the 45-minute conversation that turns qualified leads into paying clients.

CRAFT THE STRATEGY CALL SCRIPT — LEAD, DON'T PITCH

SQUARE 1 GROUP

THE SALE HAPPENS WHEN YOU STOP SELLING AND START DIAGNOSING.

STRATEGY CALL SCRIPT

INSTRUCTIONS:

The Strategy Call isn't about convincing — it's about clarity. By now, your Triage Call has done the heavy lifting: you know their pain, you know they're serious, and now it's your job to lead them to a decision with confidence.

This worksheet gives you a step-by-step structure to turn your 45-minute Strategy Call into a predictable, pressure-free close.

By the end, you'll have your personal script that:

- Positions you as an advisor, not a closer
- Builds authority through storytelling
- Ends with a confident, clean close

THE GUIDE:

STEP 1:

Set the Tone (2 min)

Say something like:
"Hey [name], good to see you again. The goal today is to map out where you're at, where you want to go, and see if we can help bridge that gap. Sound good?"

- You set the agenda.
- They agree to follow your lead.

STEP 2:

Reconnect (3 min)

Ask:
"Before we dive in, what's changed since our last chat?"

This reactivates emotion and gives you fresh data.

Fill in the blank:
Their most recent update or frustration: __________.

STEP 3:

Define the Vision (5 min)

Get them to verbalize what winning looks like:
"If we were meeting 90 days from now and everything went perfectly, what would that look like for you?"

Fill in the blank:
Their dream outcome: __________.

This locks in emotional commitment.

STEP 4:

Surface the Problem (5 min)

Ask:
"What's getting in the way of that right now?"
"What have you tried so far?"

Fill in the blank:
Their #1 roadblock is ________.

Your goal: make them articulate the pain — not you.

STEP 5:

Introduce the Gap (3 min)

Summarize back to them:
"Got it — so you're here (X), you want to be there (Y), and what's missing is (Z). Does that sound right?"

- They feel seen.
- You're now the guide to bridge the gap.

STEP 6:

Teach (10 min)

This is your "aha" moment. Show them a **simple visual, analogy, or framework** to explain your process.

Fill in the blank:

My signature process/framework is called __________.
Example: "The Leadflow Launchpad."

Then explain how it works in 3 simple steps.
Example: "1. Clean up your funnel. 2. Create ads that convert. 3. Automate follow-up."

- Keep it simple.
- Focus on why it works, not every detail.

STEP 7:

Transition to Offer (5 min)

Say:
"This is exactly what we do with clients. Would it make sense to walk you through what that looks like?"

Then pause. Let them say yes.

- Ask permission to sell = control + respect.

STEP 8:

Present Your Offer (10 min)

Use this framework:

1. **What:** The container (program, service, timeline)
2. **How:** Core deliverables or milestones
3. **Why:** The transformation (emotional + tangible outcome)
4. **Social Proof:** Client story or quick stat
5. **Price Reveal:** Say it confidently, then stay quiet

Fill in the blanks:
My offer: __________
My price: $__________
My guarantee or risk reversal: __________

STEP 9:

Handle Objections (5–10 min)

If they hesitate, use the **Objection Flip Formula:**

1. **Empathize:** "Totally get that."
2. **Normalize:** "Most people feel that way."
3. **Reframe:** "Here's what that actually means…"
4. **Prove:** Share quick proof or story.
5. **Close:** "So does it make sense to move forward?"

Fill in the blanks:
The most common objection I get is __________.
My best reframe for it: _______.

STEP 10:

Close with Clarity (2 min)

Say:
"Sounds like this makes sense. Ready to get started?"

Then, immediately:

- Send payment link or proposal.
- Schedule onboarding or next step on the spot.

Fill in the blanks:
My final close line will be __________.
Example: "Let's lock in your spot while we're on the call."

Why It's Important: You're not selling — you're prescribing. When your Strategy Call has structure, authority, and calm confidence, you'll never feel pushy again. You'll leave every call with clarity: either a yes, a no, or a referral.

Want help reviewing your sales call flow or objection handling? Book a free strategy session:

square1grp.com/brainstormsession

You've now built your Strategy Call script.

Tomorrow, we'll add the final piece — Follow-Up & Tracking — so you can manage unclosed deals and increase your close rate over time.

FOLLOW-UP & TRACK —
CLOSE THE LOOP AND MULTIPLY YOUR WINS

SQUARE 1 GROUP

DEALS DON'T DIE BECAUSE PEOPLE SAY "NO."
THEY DIE BECAUSE YOU STOPPED FOLLOWING UP.

FOLLOW-UP & TRACK

INSTRUCTIONS:

You've mapped your flow, built your Triage Call, and nailed your Strategy Call.
Now comes the part that separates amateurs from closers — **the follow-up.**

This worksheet builds the system that recovers 20-30 % of "maybes." It's part automation, part accountability: a mix of emails, texts, and touches that turn silence into signed contracts.

By the end, you'll have:

- A 7-day follow-up sequence
- A tracking sheet for every open deal
- A simple rhythm you can delegate or automate

THE GUIDE:

STEP 1:
Define Your Follow-Up Goal

Fill in the blank:
The purpose of my follow-up system is to __________.

Example: Re-engage leads who ghost after a Strategy Call and get a clear yes or no.

STEP 2:
Choose Your Follow-Up Window

Fill in the blank:
I'll follow up for ___ days after a call before moving someone to "cold."

Example: "14 days."

- Most deals close within the first 7-10 days of follow-up.

STEP 3:
Write Your Follow-Up Cadence

Use this base pattern (then customize it):

Day	Channel	Goal	Example
1	*Email*	*Quick recap*	*"Here's what we covered + next steps."*
3	*Text*	*Soft touch*	*"Just checking in — still thinking it over?"*
5	*Email*	*Value add*	*"Here's a client case study you'll relate to."*
7	*DM or Text*	*Direct question*	*"Want me to save your spot for this month?"*

Fill in the blank:
My primary follow-up channel will be __________.

STEP 4:
Pre-Write Your Follow-Up Messages

Create 3 short templates:

1. **Friendly Check-In:** "Hey [name], wanted to see where your head's at after our call."
2. **Value Reminder:** "Sharing a quick win from a client who was in your exact spot last month."
3. **Last Call:** "Wrapping up my calendar for this week — want me to hold a spot?"

Fill in the blank:
I'll add personal touches like __________.

Example: "Mention something specific they said on the call."

STEP 5:
Automate the First Touch

Fill in the blank:
I'll automate my first follow-up email via __________.

Example: "GoHighLevel or HubSpot workflow."

- Immediate follow-ups triple response rates.

STEP 6:
Build Your Deal Tracker

Use a simple Google Sheet or CRM pipeline with these columns:
| Name | Stage | Last Touch | Next Touch | Status | Notes |

Fill in the blank:
I'll update this sheet every __________.

Example: "Morning at 9 AM."

STEP 7:
Add Notifications or Reminders

Fill in the blank:
I'll get reminded to follow up via __________.

Example: "Slack ping, Google Calendar, or CRM task."

- Automation is worthless if you forget to check it.

STEP 8:
Create a "No Response → Nurture" Rule

Fill in the blank:
After ___ days of no response, I'll move the lead to __________.

Example: "30 days → Nurture List."

- Never delete — just downgrade and re-engage later.

STEP 9:
Review Your Metrics Weekly

Track:

1. Total Follow-Ups Sent
2. Replies Received
3. Calls Re-booked
4. Deals Closed

Fill in the blank:
My target follow-up close rate is __________ %.

Example: "20 % of unclosed leads converted within 14 days."

STEP 10:
Refine Your System

After 2 weeks, review and answer:

Which message got the most responses? __________
Which follow-up felt forced or spammy? __________
What will I change next time? __________

Why It's Important: Most solopreneurs lose sales because they disappear after the call. Your pipeline isn't dead — it's just waiting to be followed up on. A clean system makes you look disciplined, confident, and trustworthy — and that alone closes deals.

Need help setting up your automation or CRM tracker? Book a free strategy session:

square1grp.com/brainstormsession

You've now built the entire 2-Call Close System — from lead qualification to follow-up.

Next, we'll combine everything into The 2-Call Close Playbook so you can run it like a machine every week.

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You don't need more calls— you need better ones.

Inside this playbook, you'll:

- Design a frictionless sales flow
- Build your triage and strategy call scripts
- Master follow-ups that convert without chasing

By the end, you'll have a full 2-call close system that turns qualified leads into clients—consistently.

Start your 2-call close system today.

square1grp.com/brainstormsession