

# THE PROPOSAL- TO-CLOSE PLAYBOOK

If proposals go quiet, the system is broken.



# AUDIT YOUR PROPOSAL-TO-CLOSE REALITY

SENDING PROPOSALS DOESN'T MAKE YOU MONEY. CLOSED DECISIONS DO.

PROPOSAL-TO-CLOSE

## HOW TO USE THIS WORKSHEET

Most solopreneurs believe proposals mean progress. In reality, proposals often become the place deals go to stall, delay, or quietly die. Today you are not guessing. You are measuring.

This worksheet forces you to confront how many proposals actually turn into revenue versus how many sit in follow-up limbo. The goal is to expose whether proposals are helping you close deals or simply creating false pipeline confidence.

## THE WORKSHEET:

<p><b>1. Define what counts as a proposal in your business</b></p> <p>Finish this sentence: "A proposal in my business is _____."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>a pricing document</li> <li>a scope of work</li> <li>a service package breakdown</li> <li>a written offer</li> <li>a custom quote</li> <li>a follow-up email with pricing</li> </ul> <p>Write yours: _____</p>	<p><b>2. Count your recent proposals</b></p> <p>Look at the last 30–60 days.</p> <p>Fill in: Proposals sent: _____ Deals closed: _____ Deals stalled: _____ Deals ghosted: _____</p> <p>This shows reality, not effort.</p>	<p><b>3. Calculate your proposal conversion rate</b></p> <p>Fill in: Out of _____ proposals, _____ became paying clients. Conversion rate = _____ % Anything below 30–40% usually means the proposal process is broken.</p>	<p><b>4. Measure proposal follow-up drag</b></p> <p>Finish this sentence: "After sending a proposal, I usually spend _____ days or weeks following up."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>3 days</li> <li>2 weeks</li> <li>a month</li> <li>multiple months</li> </ul> <p>Write yours: _____</p> <p>Long follow-up cycles equal slow cash flow.</p>	<p><b>5. Identify your most common proposal outcome</b></p> <p>Check the most common result:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Silence</li> <li><input type="checkbox"/> "I need to think about it"</li> <li><input type="checkbox"/> Comparison shopping</li> <li><input type="checkbox"/> Budget hesitation</li> <li><input type="checkbox"/> Delayed decision</li> <li><input type="checkbox"/> Ghosting</li> </ul> <p>Check yours.</p>
<p><b>6. Identify when momentum dies</b></p> <p>Finish this sentence: "Momentum usually dies right after _____."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>price is shared</li> <li>proposal is emailed</li> <li>call ends</li> <li>next steps become unclear</li> </ul> <p>Write yours: _____</p>	<p><b>7. Identify your proposal illusion</b></p> <p>Finish this sentence honestly: "When I send a proposal, I feel _____ even though money hasn't been collected."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>relieved</li> <li>productive</li> <li>hopeful</li> <li>confident</li> <li>done with the sale</li> </ul> <p>Write yours: _____</p> <p>Proposals feel like progress but often delay decisions.</p>	<p><b>8. Count money stuck in proposal limbo</b></p> <p>Estimate total revenue currently stuck in proposals that haven't closed.</p> <p>Fill in: Active stalled proposals value: \$ _____</p> <p>This is cash waiting on decisions.</p>	<p><b>9. Identify your assumption about stalled deals</b></p> <p>Finish this sentence: "These deals didn't close because _____."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>they needed time</li> <li>budget changed</li> <li>timing wasn't right</li> <li>they got busy</li> </ul> <p>Often these assumptions hide system problems.</p> <p>Write yours: _____</p>	<p><b>10. Lock the core realization</b></p> <p>Finish this sentence: "My problem isn't sending proposals. My problem is _____."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>getting decisions</li> <li>creating urgency</li> <li>structuring commitment</li> <li>controlling momentum</li> </ul> <p>Write yours: _____</p>

### Why This Matters:

Proposals don't close deals. Decisions close deals. If proposals create delay instead of clarity, you're accidentally installing friction right when commitment should happen. Today exposed whether proposals are helping or hurting revenue. Tomorrow we diagnose exactly why deals stall after proposals so we can eliminate the friction causing prospects to freeze.

If you want help building a system where proposals turn into decisions instead of endless follow-up:

<https://square1grp.com/brainstormsession>

# DIAGNOSE WHY DEALS STALL AFTER PROPOSALS

DEALS DON'T STALL BECAUSE PROSPECTS DISAPPEAR. THEY STALL BECAUSE CLARITY DISAPPEARS.

WHY DEALS STALL

## HOW TO USE THIS WORKSHEET

Yesterday you measured how many proposals turn into revenue versus how many stall. Today, we identify why.

Most solopreneurs assume deals stall because prospects are busy, unsure, or shopping around. In reality, deals stall because the buying process loses structure at the exact moment commitment should happen.

This worksheet helps you diagnose what actually breaks after a proposal is sent so you can fix the system instead of chasing prospects.

## THE WORKSHEET:

<p><b>1. Identify what happens immediately after sending proposals</b></p> <p>Finish this sentence:</p> <p>"After I send a proposal, the next step is usually _____."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• waiting for reply</li> <li>• following up later</li> <li>• hoping they review it</li> <li>• checking in next week</li> <li>• sending reminders</li> </ul> <p>Write yours:</p> <p>_____</p>	<p><b>2. Identify the missing step</b></p> <p>Finish this sentence:</p> <p>"There is no clear _____ after the proposal."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• decision deadline</li> <li>• next meeting</li> <li>• commitment step</li> <li>• decision conversation</li> <li>• timeline</li> </ul> <p>Write yours:</p> <p>_____</p>	<p><b>3. Diagnose what the buyer experiences</b></p> <p>Finish this sentence:</p> <p>"After receiving the proposal, the buyer probably feels _____."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• overwhelmed</li> <li>• uncertain</li> <li>• unsure what to do next</li> <li>• confused about options</li> <li>• unsure how to decide</li> </ul> <p>Write yours:</p> <p>_____</p>	<p><b>4. Identify friction inside your proposal</b></p> <p>Check what may be slowing decisions.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Too many options</li> <li><input type="checkbox"/> Too much information</li> <li><input type="checkbox"/> Unclear deliverables</li> <li><input type="checkbox"/> Unclear pricing structure</li> <li><input type="checkbox"/> Unclear results</li> <li><input type="checkbox"/> Custom complexity</li> <li><input type="checkbox"/> No urgency</li> <li><input type="checkbox"/> No clear next step</li> </ul> <p>Check the biggest friction point.</p>	<p><b>5. Identify emotional hesitation</b></p> <p>Finish this sentence:</p> <p>"The buyer hesitates because they fear _____."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• making the wrong decision</li> <li>• wasting money</li> <li>• choosing the wrong partner</li> <li>• not seeing results</li> <li>• commitment risk</li> </ul> <p>Write yours:</p> <p>_____</p>
<p><b>6. Identify where leadership disappears</b></p> <p>Finish this sentence:</p> <p>"After sending proposals, I usually _____."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• step back</li> <li>• wait for response</li> <li>• avoid pushing</li> <li>• hope they decide</li> <li>• stop guiding the process</li> </ul> <p>Write yours:</p> <p>_____</p>	<p><b>7. Identify decision confusion</b></p> <p>Finish this sentence:</p> <p>"The buyer doesn't know whether to _____ or _____."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• move forward or wait</li> <li>• invest or delay</li> <li>• choose me or compare options</li> </ul> <p>Write yours:</p> <p>_____</p>	<p><b>8. Diagnose proposal timing</b></p> <p>Answer honestly:</p> <p>Do you present proposals live on a call?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If no, deals are often left alone with uncertainty.</p>	<p><b>9. Define your real stall cause</b></p> <p>Finish this sentence:</p> <p>"Deals stall after proposals because _____."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• no urgency exists</li> <li>• no decision structure exists</li> <li>• no timeline is defined</li> <li>• buyers are left alone to decide</li> </ul> <p>Write yours:</p> <p>_____</p>	<p><b>10. Lock the diagnosis</b></p> <p>Finish this sentence:</p> <p>"My stalled deals are caused by lack of _____, not lack of interest."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• structure</li> <li>• clarity</li> <li>• urgency</li> <li>• leadership</li> <li>• decision framing</li> </ul> <p>Write yours:</p> <p>_____</p>

### Why This Matters:

Deals rarely die because prospects lose interest. They die because momentum collapses when structure disappears. When buyers are left alone with uncertainty, delay feels safer than action. Tomorrow we rebuild how proposals are presented so buyers move naturally toward decisions instead of drifting into follow-up limbo.

If you want help installing a proposal process that creates decisions instead of delays:

<https://square1grp.com/brainstormsession>

# REBUILD THE PROPOSAL BUYING JOURNEY

PROPOSALS SHOULDN'T PAUSE MOMENTUM. THEY SHOULD ACCELERATE DECISIONS.

PROPOSAL BUYING JOURNEY

## HOW TO USE THIS WORKSHEET

Most proposals are delivered at the exact moment leadership disappears. The call ends. The proposal gets emailed. The prospect is left alone to decide. Momentum dies.

Today you redesign the journey so proposals move prospects forward instead of leaving them stuck in evaluation mode.

The goal is to create a buying path where decisions happen inside structure, not in isolation.

# THE WORKSHEET:

<p><b>1. Map your current proposal journey</b></p> <p>Fill in what actually happens today.</p> <p>Conversation → _____ → _____ → _____ →</p> <p>Decision (maybe)</p> <p>Example: Conversation → send proposal → wait → follow up → silence</p> <p>Your journey:</p>	<p><b>2. Identify where the buyer is left alone</b></p> <p>Finish this sentence:</p> <p>"The buyer is left alone to decide after _____."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• the call ends</li> <li>• the proposal is emailed</li> <li>• pricing is shared</li> <li>• the meeting wraps up</li> </ul> <p>Write yours:</p>	<p><b>3. Define what should happen instead</b></p> <p>Finish this sentence:</p> <p>"Instead of sending proposals and waiting, the next step should be _____."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• reviewing proposal live</li> <li>• decision conversation</li> <li>• commitment discussion</li> <li>• implementation planning</li> </ul> <p>Write yours:</p>	<p><b>4. Identify missing structure</b></p> <p>Finish this sentence:</p> <p>"My proposal process lacks a clear _____."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• decision step</li> <li>• review meeting</li> <li>• commitment checkpoint</li> <li>• timeline</li> <li>• ownership</li> </ul> <p>Write yours:</p>	<p><b>5. Decide how proposals should be delivered</b></p> <p>Answer honestly: Proposals should be delivered:</p> <p><input type="checkbox"/> Live on a call <input type="checkbox"/> Sent by email <input type="checkbox"/> Left for buyer to review alone</p> <p>Best choice: _____</p> <p>Live delivery keeps momentum alive.</p>
<p><b>6. Define the next-step clarity</b></p> <p>Finish this sentence:</p> <p>"After reviewing the proposal, the buyer should _____."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• make a decision</li> <li>• commit to next step</li> <li>• begin onboarding</li> <li>• schedule kickoff</li> </ul> <p>Write yours:</p>	<p><b>7. Remove evaluation drift</b></p> <p>Finish this sentence:</p> <p>"The buyer should not leave the proposal stage without _____."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• clear decision</li> <li>• next step</li> <li>• commitment action</li> <li>• timeline</li> </ul> <p>Write yours:</p>	<p><b>8. Identify unnecessary delay</b></p> <p>Finish this sentence:</p> <p>"My current process allows delay because _____."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• no deadlines exist</li> <li>• no follow-up structure exists</li> <li>• buyers control timeline</li> <li>• decisions aren't framed</li> </ul> <p>Write yours:</p>	<p><b>9. Define your ideal proposal journey</b></p> <p>Fill in the improved path:</p> <p>Conversation → _____ → _____ →</p> <p>Commitment → Implementation</p> <p>Example: Conversation → live proposal review → decision → onboarding</p> <p>Your journey:</p>	<p><b>10. Lock the redesign principle</b></p> <p>Finish this sentence:</p> <p>"Proposals should create _____, not delays."</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• decisions</li> <li>• momentum</li> <li>• clarity</li> <li>• commitment</li> </ul> <p>Write yours:</p>

## Why This Matters:

When proposals are delivered without structure, buyers default to delay.  
When proposals are reviewed inside leadership and clarity, decisions happen faster and cleaner.  
Tomorrow we install a commitment system so proposals naturally lead to decisions instead of endless follow-up.

If you want help redesigning your proposal process so deals close faster and cleaner:

<https://square1grp.com/brainstormsession>

# INSTALL A PROPOSAL COMMITMENT SYSTEM

PROPOSALS SHOULDN'T START FOLLOW-UP. THEY SHOULD TRIGGER DECISIONS.

PROPOSAL COMMITMENT SYSTEM

## HOW TO USE THIS WORKSHEET

By now, you've seen the real problem. Deals don't die because proposals are weak. They die because proposals are delivered without a commitment system.

When proposals are sent and the process loses structure, buyers drift into delay mode. Today, you install a system where proposals naturally lead to decisions instead of endless follow-up. This worksheet converts your proposal stage from passive waiting into active decision-making.

## THE WORKSHEET:

<p><b>1. Define the purpose of your proposal stage</b></p> <p>Finish this sentence:</p> <p>"The purpose of my proposal stage is to produce _____."</p> <p>Examples:</p> <ul style="list-style-type: none"><li>• a decision</li><li>• a commitment</li><li>• an agreement</li><li>• payment</li><li>• enrollment</li></ul> <p>Write yours: _____</p>	<p><b>2. Define the commitment action</b></p> <p>Finish this sentence:</p> <p>"Commitment at the proposal stage looks like _____."</p> <p>Examples:</p> <ul style="list-style-type: none"><li>• signing agreement</li><li>• making payment</li><li>• choosing to move forward</li><li>• booking kickoff</li></ul> <p>Write yours: _____</p>	<p><b>3. Install the decision conversation</b></p> <p>Finish this sentence:</p> <p>"After reviewing the proposal, we will _____."</p> <p>Examples:</p> <ul style="list-style-type: none"><li>• make a decision together</li><li>• confirm next steps</li><li>• start implementation</li><li>• commit or close the loop</li></ul> <p>Write yours: _____</p>	<p><b>4. Set the expectation early</b></p> <p>Finish this sentence:</p> <p>"Before presenting proposals, I will tell buyers _____."</p> <p>Examples:</p> <ul style="list-style-type: none"><li>• we'll decide next steps together</li><li>• the goal is clarity and decision</li><li>• we'll determine fit today</li></ul> <p>Write yours: _____</p>	<p><b>5. Define your decision boundary</b></p> <p>Finish this sentence:</p> <p>"If a buyer is not ready to decide, then _____."</p> <p>Examples:</p> <ul style="list-style-type: none"><li>• the opportunity pauses</li><li>• we revisit later</li><li>• the process stops for now</li><li>• we close the loop</li></ul> <p>Write yours: _____</p> <p>Boundaries prevent endless follow-up.</p>
<p><b>6. Remove proposal drift</b></p> <p>Finish this sentence:</p> <p>"I will no longer allow proposals to be _____."</p> <p>Examples:</p> <ul style="list-style-type: none"><li>• sent without a review call</li><li>• left without next steps</li><li>• followed up endlessly</li><li>• ignored without closure</li></ul> <p>Write yours: _____</p>	<p><b>7. Define urgency framing</b></p> <p>Finish this sentence:</p> <p>"If nothing changes for the buyer, then _____ continues."</p> <p>Examples:</p> <ul style="list-style-type: none"><li>• their current problem stays</li><li>• growth remains stuck</li><li>• revenue remains inconsistent</li></ul> <p>Write yours: _____</p> <p>Without urgency, delay feels safe.</p>	<p><b>8. Install your commitment script</b></p> <p>Create the statement you will use.</p> <p>Example template:</p> <p>"The goal of this proposal review is to decide whether moving forward makes sense. If it does, we'll take the next step today. If it doesn't, we'll close the loop cleanly."</p> <p>Write yours: _____</p>	<p><b>9. Install your new operating rule</b></p> <p>Finish this sentence:</p> <p>"From now on, proposals will always include _____."</p> <p>Examples:</p> <ul style="list-style-type: none"><li>• a decision meeting</li><li>• commitment step</li><li>• clear timeline</li><li>• implementation plan</li></ul> <p>Write yours: _____</p>	<p><b>10. Lock the system principle</b></p> <p>Finish this sentence:</p> <p>"Proposals don't close deals. _____ close deals."</p> <p>Examples:</p> <ul style="list-style-type: none"><li>• decisions</li><li>• commitment</li><li>• clarity</li><li>• leadership</li></ul> <p>Write yours: _____</p>

## Why This Matters:

Sending proposals feels productive, but decisions create revenue. When proposals are delivered without commitment structure, prospects drift. When proposals are delivered inside a commitment system, decisions happen naturally. A proposal should be the final clarity step, not the start of follow-up purgatory.

If you want help installing a proposal system that produces decisions instead of delays:

<https://square1grp.com/brainstormsession>

# Proposals don't close deals — decisions do.

This workbook helps you audit what really happens after proposals are sent, diagnose why momentum stalls, rebuild the buying journey for clarity and confidence, and install a proposal commitment system that moves deals forward instead of leaving them stuck in limbo.

Stop waiting for replies. Start engineering closes. Open the workbook and rebuild your proposal process.

[square1grp.com/brainstormsession](https://square1grp.com/brainstormsession)

