



CLOSING THE DEAL

Worksheets

[Click here to go to the article with details on how to use this worksheet.](#)

CALL OBJECTIVES/ADVANCES

What is my primary call objective? (Call Objectives should be:

- 1. Specific & measurable,**
- 2. Center on the action the client will take,**
- 3. Move the sale forward,**
- 4. Be reasonable from the client's perspective)**

What is my Ideal Advance for this meeting?

Perfect Close phrase:



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BACKUP OBJECTIVES

What is the client's Current Situation & Challenges?	
What is the Impact of their Current Situation & Challenges?	
What hidden challenges might there be?	
What might be the impact of those hidden challenges?	
Which risks are likely to be of greatest concern?	

MINIMUM ADVANCE

**What is the smallest advance I am willing to accept
and still move forward?**

Perfect Close phrase:



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BRING UNEXPECTED VALUE

What unexpected value can I bring to this meeting?

Notes:

A large rectangular area filled with a light grey grid pattern, intended for taking notes. The grid is composed of small squares and is enclosed by a thin grey border.

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