Face-to-Face Sales Checklist

LoftyBiz 037 · Selling face-to-face: checklists for shops, clinics and site visits.

These are examples, not promises. Figures are illustrative, in US dollars, and are not targets, forecasts or typical results. General business education, not financial, legal or tax advice. No contact details.

Point 1 · Run every site visit from a checklist and close before you leave

Worked example: Tomás, kitchen renovation company, Santiago, Chile. An average kitchen costs $6,000. He did 40 home visits a month, measured everything, went back to the office, and emailed a quote about a week later. Only 8 of the 40 became jobs, a close rate of 20%.

The five steps: 1) prepare before you arrive — confirm both partners will be home, send a short video and two photos of past work; 2) open with proof, promise and plan in 30 seconds ("We've rebuilt 140 kitchens in this part of the city"); 3) walk the space and ask 10 questions before you measure; 4) show Good, Better and Best on the spot, each with a price and a start date; 5) ask for the decision before you leave, take a 10% deposit, or book a follow-up call for the next day. Keep the checklist, the three prices and the follow-up dates in Systex.

Tomás · Santiago (USD, example)	Before	After three months
Home visits a month	40	40 (same visits)
Jobs closed a month	8	14
Close rate	20%	35%
Average kitchen	$6,000	$6,000
Extra jobs a month	—	6 (14 − 8)
Extra revenue a month	—	6 × $6,000 = $36,000

His newest salesperson, following the same checklist, now closes almost as well as he does. He tracked close rates every week in Systex, so the new numbers stayed visible. Example figures, not a promise.

Point 2 · Use a written plan to sell in clinics and shops

Worked example: Dr. Ayesha, physiotherapy clinic, Lahore. Patients pay themselves, with no insurance. She saw 120 new patients a month for an assessment at $15. Only 30% came back for treatment, and most came only once or twice. They left with advice, not a plan.

The five steps: 1) greet every patient the same way — within 1 minute, use their name, offer water, explain the next 40 minutes; 2) assess with a checklist and ask about life ("What can't you do right now that you want to do again?"); 3) prescribe a plan in writing — "Eight sessions over four weeks, so you can carry your grandson again," at $120 (eight singles would cost $140); 4) give before you ask — a free exercise band and two home exercises, then payment all now or half now and half in two weeks; 5) book all eight sessions before they leave; if they want to think, reception calls the next day, "What would help you decide?" Those bookings lived in Systex. The same steps work in a shop: greet within a minute, ask what the customer wants to do, recommend one product in writing, give a small sample, and ask for the sale at the counter.

Ayesha · Lahore (USD, example)	Before	After three months
New patients a month	120	120 (same flow)

Assessment price	$15	$15
Chose a plan	30% · 36 patients	55% · 66 patients
Plan price	$120	$120 (eight singles would cost $140)
Extra plans a month	—	30 (66 – 36)
Extra revenue a month	—	30 × $120 = $3,600
Sessions attended, on average	2	7

Her team now uses the same three checklists on every shift, kept in Systex, so the follow-up did not depend on one person's memory. Example figures, not a promise.

This week

#	Action	Done
1	Write your 30-second proof, promise and plan intro.	
2	Make a ten-question checklist for every visit.	
3	Build a price sheet so you can quote three options on the spot.	
4	Ask for the decision before you leave, and take a deposit.	
5	Write a one-page plan for your most common customer.	
6	Track how many visits close the same day. Put this week's list into Systex.	

Blank numbers for your own business

Your numbers (USD)	This week	After (date: _____)
Visits or new patients a month		
Close rate / plans chosen		
Jobs, plans or sales closed		
Average job or plan value		
Same-day closes		
Revenue from those closes		