LoftyBiz Sales Team Starter Kit

Write how you sell, train in seven steps, run a five-number weekly scorecard, and keep a living playbook.

Example figures. General education, not financial, legal or employment advice. Results vary. These are examples, not promises.

1. One-page sales process

Record or write down your next three sales conversations. Then fill this page so someone else can follow the same steps.

Step	What you do today	What you will write for the team
Opening question		
What you check or demonstrate		
The plan or offer you make		
How you handle the three most common objections		
Follow-up (when, and what you send)		

2. Seven-step training

Train in this order. Do not skip to full accounts on day one.

Step	What happens	Done? (date)
1	Learn the products and the prices	
2	Watch the owner run practice visits with a friendly client	
3	Run visits while the owner watches and stays quiet	
4	After each visit, review one thing that went well and one thing to change	
5	Practise the three most common objections	
6	Handle small clients on their own	
7	Take full accounts, with weekly reviews	

Daily drill: fifteen minutes each morning on one part of the visit (the opening, the demonstration, or the price conversation). Short, daily practice beats long, rare training days.

3. Weekly scorecard — five numbers

Track the same five numbers for every seller. Share the card every Monday. Coach one number at a time. Use the card to coach, not to blame.

Seller	New conversations	Site visits	Quotes sent	Deals won	Average order size	Notes / one coac
TEAM TOTAL						

4. Playbook outline

Section	Write your current best version	Last reviewed
Best opening questions		
Answers to the five most common objections		

Follow-up schedule		
Example emails (no customer names or addresses)		
Quarterly review notes (what went in, what came out)		

Send the best leads to the best closers. Let newer sellers learn on smaller orders. Review the playbook every quarter.

5. This week's homework

Task	Done?
Record or write down the next three sales conversations	
Turn them into a one-page sales process	
Choose the five numbers for the weekly scorecard	
If you already have a seller, run one fifteen-minute drill before the week ends	
Keep the process and the scorecard in Systex so they stay in one place	

Worked example (illustrative only): Kwabena, water filters, Takoradi. He sold every contract himself for eight years and closed about one in three quotes. After writing a one-page process, hiring two people for the process, training in seven steps, drilling daily and handing over gradually, the two sellers closed about one in four quotes but ran three times as many visits. Monthly new contracts rose from about eight to about nineteen.
Worked example (illustrative only): Niamh, office furniture, Limerick, with four salespeople. After a weekly five-number scorecard, coaching one number at a time, routing the best leads to the best closers and keeping a living playbook, average monthly sales rose from about $60,000 to about $84,000 within two quarters, and she took her first full week off in three years.

Keep the process, the scorecard and the playbook in Systex so the whole team can see the same steps. Systex is our own product — loftybiz.net

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