



ONE-CALL CLOSE SALES DOMINATION WORKBOOK

Master of the Close

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HOW TO USE

This isn't your average sales training fluff. Every page in this workbook is a tactical roadmap designed to turn every call into a seamlessly closed deal. Each worksheet provides a step-by-step script outlining the exact steps for the One-Call Close process. It's got spaces to capture critical details—pain points, objections, decision-makers—everything you need to dominate the conversation. Your job? Use it on every single call. No exceptions. Treat it like your sales GPS: follow it to the letter, and watch how every call turns into a closed deal, like clockwork. This workbook ensures you never miss a beat, never skip a step, and never leave a dollar on the table. Get ready to close deals faster than ever before.

QUESTIONS?

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PROSPECT NAME

COMPANY NAME

DATE OF CALL

STEP 1 – OPEN-ENDED INTRO

"Hi, <insert prospect name>, I'm <insert your name>. Thanks for your interest in <insert business name>; What's going on? How can I help?"

List out pain points below...

01

02

03

04

05

STEP 2 – PARAPHRASE & CONFIRM

"What I'm hearing is <insert pain point> are major pain point."

Did you paraphrase and confirm each pain point?

YES / NO

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STEP 3 – ESTABLISH NEXT STEPS

"<insert prospect name>, thank you so much.

*The good news is, **WE GOT YOU**. I've worked with 100s of businesses like yours and feel confident we'll be able to help.*

*I immediately know **three carriers** will be a good fit.*

*There is **one program** in particular I hope you qualify for that I'd like to get you into...*

Here's what happens next:

- First, I must grab some information before we get off the phone. This will take like 20 minutes...or I can email the questions I need answers to. Would you prefer email?*
- After that, I get to work. I will take your information to the market and find the coverage you need at the most competitive rate. How does that sound?"*

REMINDER

There are two kill shots in this section:

- "We got you." - Puts prospect at ease.
- "Three carriers" & "One Program" - These two sentences establish you as an expert while creating a red velvet rope feeling.

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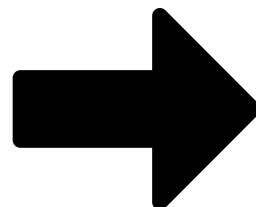
STEP 4 – SET UP THE VIDEO PROPOSAL

"Once I have everything together, the next thing you'll get from me is a video proposal."

"We use video proposals because we want our clients to make their insurance decisions from a position of power. You should know what you're buying. This means you get all the information I have before you decide to work with us. The video proposal will contain three parts."

- *"In the body of the email, I'll put a high-level overview of our recommendation for carrier and coverage options as well as the next steps when you're ready to place coverage."*
- *"You will also see a short video from me breaking down my thoughts and recommendations for carrier, coverage, and pricing. This will be 3-5 minutes tops. Based on our discussion today, I highly recommend watching the video as it will give you all the information you need."*

LAST PART OF VIDEO
PROPOSAL INTRO ON
NEXT PAGE



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STEP 4 – SET UP THE VIDEO PROPOSAL

- *“Lastly, attached to the email will be the actual carrier proposal. This is what I get from the carrier, and it will be the same document I breakdown in the video. I send you the carrier proposal because I hate buying things when I don't have all the information. So I will include the carrier proposal because I want you to have everything I have. Now the next time we get on the phone, we can have a quality conversation where we're both from a position of power.”*

“This should take me no more than <insert estimate on turnaround time>. Does that work for you?”

STEP 5 – CLOSING OPEN-ENDED QUESTION

“One last question: what would make this relationship a success for you?”

01

02

03

GET OFF THE PHONE!

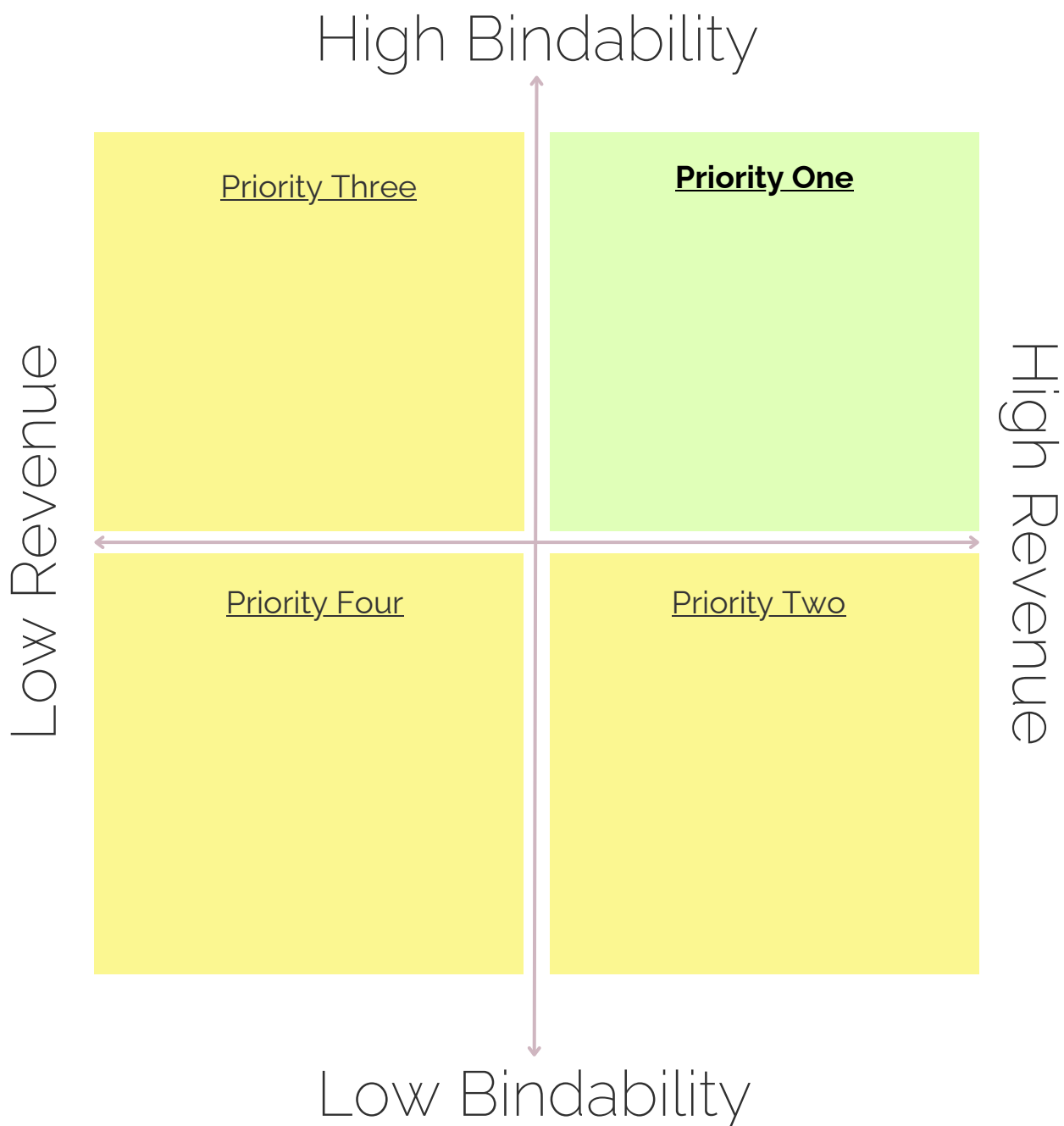
NOTES

Use this section to write down any additional notes, thoughts, or possible solutions, such as carriers, coverages, etc, that might be relevant to closing the account.

[illegible]

PROSPECT SCORE

Use this section to prioritize where this lead falls in your funnel & how it's delegated.



I'LL LEAVE YOU WITH THIS



“

Get the fuck after it.

THIS IS THE WAY.

