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The Small Business Sales Toolkit

Five plain-English guides designed for small business owners and solo founders.

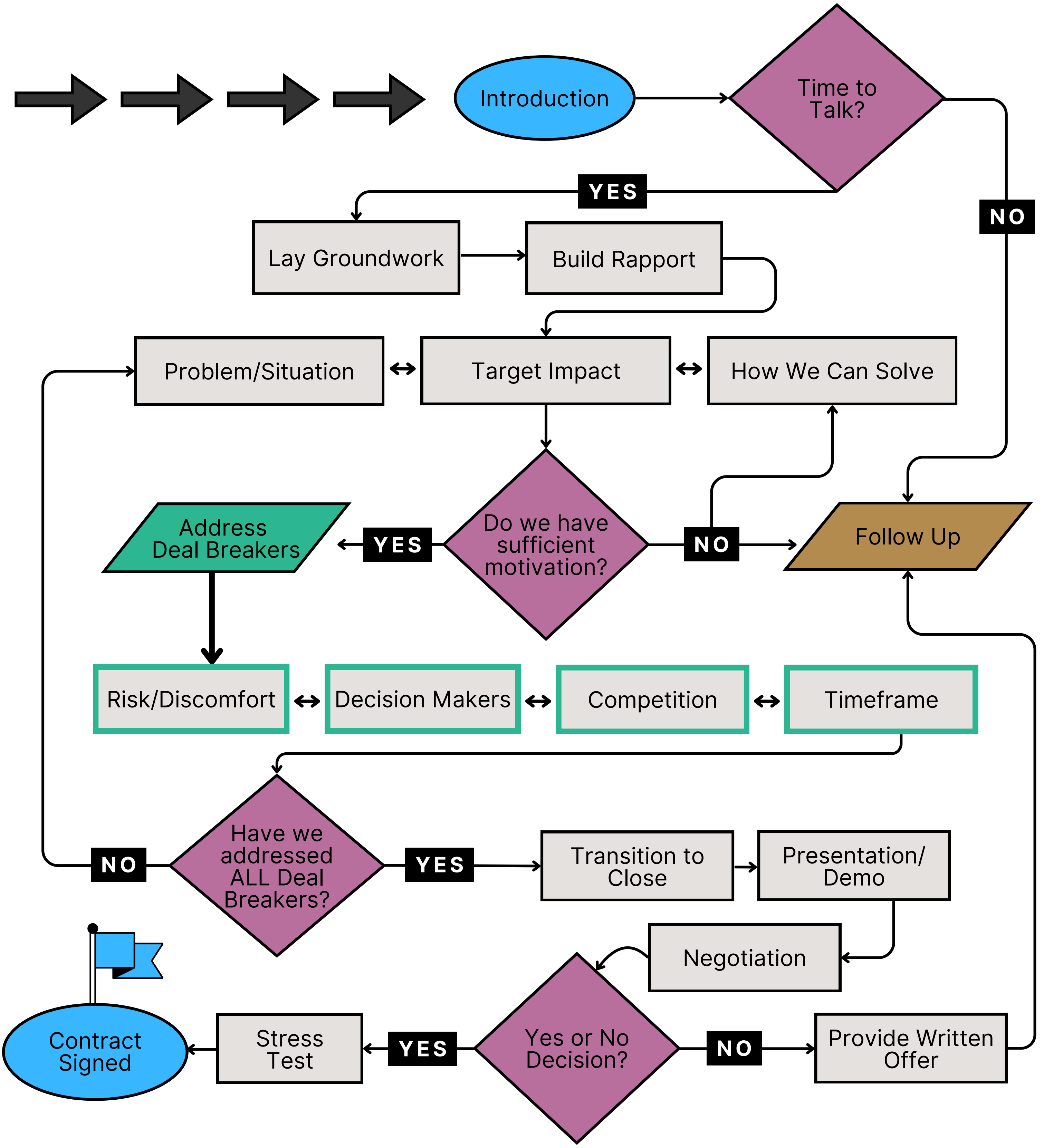
Built from real client work, for small businesses running things themselves.

WHAT'S INSIDE

*Last updated: Aug. 2026

Intro to Sales Process

SALES PROCESS FLOWCHART



First Sales Call?

JUST DO THESE 5 THINGS

Nervous? Good. That's totally normal! You don't need to memorize the whole flowchart.
On your first few calls, just do these five things and let the rest go. Repeat practice is the key.

1. Say who you are, ask if it's a bad time.

Open with your name, what you do, and a quick check that you're not interrupting. If it's a bad time, ask when's better and call back. If it's fine, keep going.

- Example: "Hi, my name is Zak. I run a local business here in Pueblo where we build websites for small businesses. Did I catch you at a bad time? / Is now a bad time to talk?"
- Template: "Hi, my name is ___. I run a local business here in ___. We (build/sell/fix) ___ and it looks like our businesses could be a good fit. Is now a bad time to chat?"

2. Ask about their situation, stop talking.

Ask an open question about the thing you help with, then listen. Don't pitch right away. Whatever problem they mention is the thing they might pay to fix, so write it down.

- Example: "How's your website working for you right now?"
- Template: "How's ___ working for you right now?" / "When's the last time you had trouble with ___? / Is ___ doing everything you need (or want) it to do?"

3. Ask what that costs them.

Help them say the problem out loud in their own words. What it costs them: time, money, customers, stress. This matters more than anything you could say or try to pitch.

- Example: "That sounds stressful. Has that cost you any customers so far?"
- Template: "What's that been like for you?" / "How do you think that's impacted your business?"

4. Ask for ten minutes, not the sale.

You're booking a meeting, not closing today. Suggest a short conversation and nail down a specific day and time.

- Example: "Sounds like it might be worth a quick conversation. Could I grab ten minutes this week? Perfect! Are mornings or afternoons better?"

5. If it's a "No," leave the door open.

A no today isn't a no forever. Thank them, ask to check back later, and move on.

- Example: "No problem at all, I appreciate your time. Mind if I check back in a few months?"

Cold Call Script 1.7

FIRST CALL - SALES PROCESS FLOW

INTRODUCTION

"Hello, my name is _______. Is [BUSINESS OWNER] available?"

Gatekeeper asks: "Who's calling?" / "What's this regarding?" / "How did you find us?"
"Of course! I found you guys through the [CITY] Chamber of Commerce website. I'm a local business owner in [CITY]/in the area. We build ____ (or we do ____). I saw a potential fit between our businesses and wanted to reach out."

If you KNOW the Owner's name:
". . . and I was hoping to talk to [BUSINESS OWNER] about it."
If you DON'T KNOW the Owner's name:
". . . but I'm not sure I'm in the right place. Usually I speak with the marketing director, founder, or owner. Would that be you?"

→ **If YES:** continue below.
→ **If NO:** get the owner's name and best time to reach them, then make a follow-up call.

"TIME TO TALK?"

You're gauging whether you've reached the right person and whether now works.

- If they're clearly busy or it's a bad time, don't push them to talk.
- Book a callback instead: "Sounds like I caught you at a busy time. I can call back later today or later this week. Which of those work for you?"
- Don't hesitate to ask a direct question about their time: "Did I catch you at a bad time?" If NO, proceed. If YES, schedule a follow up.

OPEN, THEN ASK FOR THE APPOINTMENT

If you're NOT talking to the owner yet ("What do you do?" / "How can I help?"):

"We do ____ and ____. It seemed like there might be a good fit, because..."

Examples:
- "...you might want more customers to be able to find you online."
- "...your site looks like it could use a refresh (or updating)."
- "...I couldn't find a website for you, and you might be losing money because of it."

Cold Call Script 1.7

FIRST CALL - SALES PROCESS FLOW

OPEN, THEN ASK FOR THE APPOINTMENT . . . continued

If you ARE talking to the owner: open, schedule the appt, and aim to uncover all three: (1) their problem, (2) the impact on them, and (3) how you can help.

Lead with one of these:

Template:

- "We help ____ [YOUR AUDIENCE] by ____ and ____ [WHAT THEY GET / THE OUTCOME] through ____ and ____ [WHAT YOU OFFER]. Could I schedule ten minutes to talk more about that?"

Example:

- "We help small businesses bring in more customers and keep more of the ones they have through building websites and specialized search engine optimization. Could I schedule ten minutes to talk more about that?"

<u>OR</u>

- "We build websites, and I noticed yours looks a little out of date." / "...I couldn't find a site for you at all. Worth a quick conversation? We can schedule ten minutes to see how I can help."

→ **NOTE:** Use the template to fill in your details, then build your own example.

ENOUGH MOTIVATION? → SCHEDULE OR FOLLOW UP

"Based on what you've told me, I think a quick conversation would be worth your time."

→ **If YES:**

- "Perfect. It'll only take about ten minutes. What days are you free this week?" [nail down a day]
- "Are mornings or afternoons better?" [nail down a time]
- Confirm the date and time back to them, and thank them for their time.

→ **If NO:**

- "No problem, I appreciate your time today."
- "Mind if I follow up in ______ to make sure the site's still doing what you need?"

Discovery Script 2.6

SALES PROCESS FLOW

GOAL OF THE DISCOVERY CALL

Your goal on this call is simple: learn what their problems are, and book the appointment. You're not selling yet, you're finding out what's wrong and what it's costing them.

Ask questions that dig into ***four things***. Under each, there's a real example (how we'd ask it) and a blank for you to fill in for your own trade or small business.

1. Is it working?
Find out whether the thing you'd help with is actually doing its job right now.

- Example: "How's your website doing for you? Is it bringing in calls?"
- Template: "How's your ___ working for you right now?" / "Is your ___ doing what you need it to?"

2. Is it costing them?
Get at the pain: time, money, customers, stress. This is where the real motivation lives.

- Example: "Is your site saving you time on the phone, or are you still fielding everything yourself?"
- Template: "Is ___ costing you time or customers?" / "What's that been like to deal with?"

3. What do they wish it did?
Let them describe the better version. Their answer is the thing you'll sell them.

- Example: "What would you want your website to do for your business if it could?"
- Template: "What would you want your ___ to do if it could?"

4. Is it making them money?
Tie it back to the bottom line AKA the strongest reason to buy.

- Example: "Is your website actually driving business, or just sitting there?"
- Template: "Is your ___ actually paying off the way you hoped?"

These are their 'hot-button' issues. These are the reasons they'll buy. **Write them down and record them, then float the next step: "Would you be interested in seeing how we could [fix / improve / handle] ___ for you?"**

Book the appointment (if it's a fit):
"Perfect! It usually takes about 20-30 minutes. Are mornings or afternoons better? (nail down a time). Does Tuesday or Thursday work?" (nail down a date).

What if they ask something I don't know?
Always be upfront and honest. It builds more trust than bluffing.

- "That's a great question. I don't know off the top of my head, but I'll find out (or forward it along to the product specialist) and have an answer for you at our next meeting."

WHAT IF I GET PUSHBACK?

Pushback is normal. At some point a prospect will get frustrated, guarded, or hesitant, and that's totally OK. It usually means they're actually considering it.

Here are the objections you'll hear most, and how to handle each one:

“We already have ____ (a provider/your service)."
- "That’s totally fair. Most people I talk to already have someone. I'm not trying to get you to switch. I’d like to ask a couple quick questions to see if what you've got is working. Is that OK?

"We're not interested."
- "No problem at all. Can I follow up in a few months in case things change?"

"We don't have the budget."
- "No problem, I'm not here to sell you anything today, just to see if there's a good fit. If there isn't, I'll tell you upfront and get out of your hair."

"Send me some info / an email."
- "Absolutely! So I send the right info, can I ask one quick question about ____?" (if they'll give you 20 seconds, you're back in the conversation; if not, get the email and follow up).

"How much does it cost?"
- "Depends on what you need, which is exactly why I'd want the ten minutes first, so I'm not wasting your time and throwing out a number that doesn't fit you."

"[Competitor] does it for way less." / "I can get this cheaper somewhere else.”
- "You probably can, there's always someone cheaper. The question I'd ask is what you're actually getting for it. Can I show you the difference in ten minutes, and if it's not worth it to you, I’ll get out of your hair?”

"I'm busy right now."
- "No problem at all. I don't want to catch you at a bad time. Is tomorrow or later this week better for a quick call?”

"I need to think about it." / They won't give you an answer.
- "I understand it's a lot to think about. Honestly, in my experience 'let me think about it' is usually a polite no, and that's OK. If after everything we’ve talked about, you don’t feel good about a yes, then we need to make it a no. And, that’s completely OK.”

When the real problem is embarrassment (usually money).
- "You know, that's more common than you'd think. It happens to good people all the time. From what I can tell, you're handling it better than most."

Discovery Script 2.6

SALES PROCESS FLOW

IF/THEN CHEAT SHEET

These are moves to keep a conversation going and dig deeper. Use them when the call is live but stalled, and you're not sure what to say next. (For handling objections and resistance, see the 'What if I Get Pushback' sheet.)

SAFE TO USE ANYTIME

Start here. None of these can backfire so use them on your very first call.

→ ***If...you are starting ANY new conversation and want to set it up right.***
Open with an advance agreement so they know what to expect.

- "Do you have ___ minutes? We are going to talk about ___. As far as next steps go, yes is great and no is OK too."
- "Do you have ___ minutes to spare? I just want to talk through ___. If it's a fit, great. If not, that's completely OK too."

→ ***If...they give you a short or one-word answer and you want them to open up.***
Ask a personal-impact question. It gets them talking about how it actually affects them.

- "What do you mean by that?" / "What's that been like?" / "How does that affect your business?"

→ ***If...they don't have enough motivation to take a next step or mention a problem in passing.***
Go deeper and wider with any and all pain points. The thing they bring up unprompted is usually the real objection or deal breaker.

- "I can't stop thinking about something you said. You mentioned ___ earlier. Why did you bring that up?"
- "You mentioned ___ a second ago. Tell me more about that. Where's that coming from?"

→ ***If...they're still guarded, untrusting, or start to get a little defensive.***
Keep them talking with a softening statement and Socratic questioning.

- "That makes sense / I understand where you're coming from. Why do you think that is?"

→ ***If...they say everything's 'fine' but you sense there's more.***
Help them picture the better version. 'Fine' often means 'I've stopped expecting better.'

- "Paint me a picture / What if... / If ___ could work exactly how you wanted, what would that look like? How would that change things for you?"

→ ***If...you're not sure whether they're ready to move forward.***
Ask a commitment question. Giving them room to say 'no' makes a 'yes' mean more.

- "Will you be able to give me a yes or no today? And no is totally OK."

Discovery Script 2.6

SALES PROCESS FLOW

IF/THEN CHEAT SHEET
. . . continued

USE WITH CARE

Powerful when the timing and tone is right. Use these once you've got a few calls under your belt and you need to nudge them in one direction or the other.

→ ***If...they're stuck and you're having trouble finding their motivation.***
Use a low-pressure 'what if.' It lets them explore the idea without fully committing.

- "It's completely up to you, but <u>if</u> you ever did decide to (fix/buy) ____, why would you?"
- **NOTE: → When NOT to use it:** Don't reach for this until you've uncovered a real problem first. Used too early it feels like you're leading them. Let them name a pain point, then use this to ask about that.

→ ***If...you need to ask something that might feel too dangerous or direct (like price).***
Ask it as a takeaway: Say the scary part outloud yourself, so it doesn't feel like pressure.

- "Honestly, there's probably no way you'd ever spend $___ on this."
- **NOTE: → When NOT to use it:** Only when there's real rapport and you can say it with confidence. Said flat or nervous, it sounds sarcastic or confrontational. If in doubt, just ask straight: "What is the range you had in mind?"

WHEN IT GETS TENSE

Every seller has a call go sideways. Here's how to handle it courteously when it does.

→ ***If...you sense you've upset them or the call has gone cold.***
Take responsibility and own the feeling, honestly.

- "I get the feeling I said the wrong thing there, and that's on me. I didn't mean to put you on the spot. I feel terrible."
- **NOTE: → Say this only if you genuinely mean it.** Don't perform or use it as a tactic to win them back. People can tell, and a fake apology does more damage than the original.

De-escalation Tips

FOR LIVE CALLS WITH CLIENTS/CUSTOMERS

1. GIVE TIME TO VENT

Do not interrupt, even to help.

People need to empty the tank before they can hear you. The pause after they finish is their brain working. Give them time to fully explain.

2. SET THE TONE/TEMP

Never match their volume.

Go quieter and calmer than feels natural, especially if they came in hot. Your tone sets the temperature of the call, not your words.

3. NAME THE FEELING

"It sounds like this has been a real headache."

Naming what someone feels tells them you get it. It also takes the heat off of the feeling.

4. LISTEN & CONFIRM

Aim to hear, "That's right."

Repeat their side back so well that they say "that's right." That is the moment things turn from agreement to understanding. "You're right" means they've tuned you out.

5. ASK 'HOW' NOT WHY'

Ask how, not why.
"How can I make this right for you?"

'Why' sounds like blame. 'How' hands them the problem to solve alongside you instead of a wall to push against.

6. WORST GOES FIRST

Say the hard part first.
Name the worst thing they are thinking before they say it.

"You are probably feeling like our price is a little high." Saying it first gets the elephant out of the room.