SCALE SMART

FREE GUIDE & WORKBOOK

5 Steps to Win More Clients Without Feeling Salesy

A practical, step-by-step workbook for small business owners and solopreneurs who want a steady flow of the right clients, won through honest, helpful conversations.

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A NOTE FROM BINTA

Selling is simply helping, with a clear next step

Hello, and thank you for downloading this guide.

If you run a small business or work for yourself, you're probably brilliant at what you do. But when it comes to finding clients, asking for the work and talking about price, it can feel awkward, even a little uncomfortable. Many owners end up waiting for referrals and hoping the phone rings.

Here's the good news: winning clients doesn't require you to become pushy. The most effective selling looks a lot like good service. You get clear on who you help, start genuine conversations, ask good questions and make a confident offer when it's the right fit.

I'm a sales and business acquisition coach, and I've written this guide to be as practical as possible. There are no tricks and no hard-sell scripts. Just five clear steps, each with an exercise you can complete in an hour or two.

How to use this workbook

- Work through the steps in order. Each one builds on the last.
- Print it out or fill it in digitally. Writing your answers down matters.
- Aim for "good enough" rather than perfect. You can refine as you go.
- Give yourself a deadline. A 30-day sprint works well (see the action plan on page 9).

What's inside

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Let's get started,
Binta, Scale Smart

STEP 1

Clarify your ideal client and your offer

01

Selling feels pushy when you're talking to the wrong people. When you're clear on who you help and how, it feels like helping.

Your ideal client is the person you can help most, who values what you do and is able to pay for it. Your offer is the clear, packaged way you solve their problem. Get these two right and every other step becomes easier.

Think about your best clients

- Who have you most enjoyed working with?
- Who got the best results from your work?
- Who paid on time and referred others?
- What did they have in common?

A clear offer has...

- A specific outcome, not just a list of tasks
- A defined scope, timeline and price
- A name that's easy to remember
- A simple next step to get started

EXERCISE 1 · IDEAL CLIENT SNAPSHOT

Type of business or person: _____

Size, stage or situation: _____

The problem that keeps them up at night: _____

What they've already tried: _____

Where they spend time (online and offline): _____

EXERCISE 2 · YOUR ONE-SENTENCE OFFER

Example: "I help **independent beauty salons** to **fill quiet weekday appointments** so they can **earn more without working longer hours**."

I help _____

to _____

so they can _____

My core offer is called: _____ **Price:** _____

STEP 2

Build a simple, repeatable sales pipeline

If you only look for clients when work runs dry, you'll ride a rollercoaster of feast and famine. A pipeline smooths it out.

A sales pipeline is simply a list of the people you're talking to and the stage each one has reached. It doesn't need fancy software. A spreadsheet, a notebook or a basic CRM will do. What matters is that you look at it every week and move people forward.

Five stages to track

1. **Lead:** someone who may need what you offer.
2. **Conversation:** you've made contact and they've replied.
3. **Discovery call:** a call is booked or has taken place.
4. **Proposal:** you've made a clear offer with a price.
5. **Won or not now:** they've said yes, or you've agreed a date to check back in.

EXERCISE 3 · START YOUR PIPELINE

Add the people you're already in touch with, then keep it updated weekly

Name / business	Stage	Next action	By when	Value (£)
e.g. Local florist	*Conversation*	*Suggest a 20-min call*	*Friday*	*£*

Your weekly sales hour: block one hour in your diary each week to review your pipeline, send follow-ups and start new conversations. Treat it like a client appointment. Consistency beats bursts of effort.

STEP 3

Outreach that doesn't feel pushy

Good outreach starts a conversation. It doesn't try to close a sale in the first message.

The fastest way to fill your pipeline is to talk to people who already know, like or trust you, and to people your ideal clients already trust. Lead with genuine interest and something useful, and keep your ask small and easy to say yes to.

Four low-pressure ways to generate leads

- **Reconnect with past clients and contacts:** a friendly check-in often uncovers new work.
- **Partner with complementary businesses:** people who serve the same clients but don't compete with you.
- **Share useful content:** answer the questions your clients ask you most, then invite a conversation.
- **Show up where your clients are:** local networking groups, industry events and online communities.

EXERCISE 4 · YOUR OUTREACH LIST

Five past clients or contacts to reconnect with: _____

_____

Three possible referral partners: _____

One place my ideal clients gather: _____

A ready-to-use outreach message

"Hi [Name], I hope business is going well. I've been working with [type of client] on [problem you solve], helping them [outcome], and I thought of you because [genuine reason]. No pressure at all, but would a quick 15-minute chat be useful to see if I could help? And if the timing isn't right, I'd love to stay in touch."

Make it personal. One sentence that shows you've thought about them is worth more than a polished template sent to a hundred people.

STEP 4

Run a sales conversation that converts

04

The best sales calls feel like a helpful consultation. Your job is to understand, not to persuade.

The CLEAR discovery-call framework

Stage	What to do	Example question
Connect	Build rapport and set the agenda	*"Shall we start with where things are now?"*
Listen	Explore their situation and challenges	*"What's the biggest frustration right now?"*
Explore impact	Understand what the problem is costing them	*"What happens if nothing changes?"*
Advise	Summarise and share how you'd help	*"Here's what I'd suggest, and why..."*
Request	Make a clear offer and agree a next step	*"Would you like to go ahead?"*

Handling objections calmly

An objection is usually a request for more information or reassurance. Listen fully, acknowledge it, and ask a question before you answer.

"It's too expensive."
"That's fair to raise. Can I ask what you're comparing it with? Let's look at what the problem is costing you now."

"I need to think about it."
"Of course. What's the main thing you'd like to think through? I'm happy to answer anything now."

EXERCISE 5 · PREPARE YOUR ANSWERS

The objection I hear most: _____

The question I'll ask first: _____

How I'll respond: _____

The clear next step I'll offer at the end of every call: _____

Tip: Aim to listen for most of the call. When you do make your offer, state the price clearly and calmly, then pause and let them respond. Afterwards, send a short written summary of what you discussed and the agreed next step.

STEP 5

Follow up, and earn referrals and repeat business

Many sales are won in the follow-up, and your happiest clients are your best source of new ones.

Following up isn't nagging; it's good service. People are busy, and a polite, helpful reminder is often welcome. Once someone becomes a client, look after them well and make it easy for them to buy again and to recommend you.

EXERCISE 6 · FOLLOW-UP RHYTHM

- [ ] Same day: thank-you and summary of next steps
- [ ] Day 3: share something useful (a tip, article or idea)
- [ ] Day 7: friendly check-in on their decision
- [ ] Day 14: a final, no-pressure note
- [ ] Not now? Agree a date to reconnect
- [ ] Add every follow-up to your pipeline

EXERCISE 7 · REPEAT BUSINESS

What clients need next: _____

My follow-on offer: _____

When I'll suggest it: _____

Past clients to check in with: _____

_____

How to ask for a referral

The best time to ask is when a client has just seen a good result. Be specific so it's easy to say yes:

> "I'm really pleased with how this has gone. I'm taking on a few more clients like you this quarter. Is there one person you know, perhaps another [type of business], who's facing something similar? I'd be happy to have a no-pressure chat with them."

Capture the evidence

The result my client got: _____

Their feedback in their own words: _____

Who they've introduced me to: _____

COMMON MISTAKES

Seven mistakes that keep good businesses quiet

Each one is completely normal, and completely fixable.

1. **Waiting for clients to find you**

   Hoping for referrals leaves your income to chance. **Fix:** start three new conversations every week.

2. **Trying to appeal to everyone**

   A vague message attracts no one. **Fix:** speak directly to your ideal client and their main problem.

3. **Pitching before listening**

   Jumping to your solution makes people feel sold to. **Fix:** ask questions first and summarise their problem back to them.

4. **Discounting at the first sign of hesitation**

   Dropping your price signals doubt and erodes your margin. **Fix:** explore the objection and restate the value before anything else.

5. **Ending calls without a next step**

   "Let me know" often means you never hear back. **Fix:** agree a specific next step and date before you hang up.

6. **Giving up after one follow-up**

   Silence usually means busy, not no. **Fix:** use the follow-up rhythm in Step 5 and track it in your pipeline.

7. **Forgetting existing clients**

   Past clients already trust you, yet are often overlooked. **Fix:** check in regularly and make repeat work and referrals easy.

PUTTING IT TOGETHER

Your 30-day action plan

Knowledge only pays when it turns into action. Use this plan to keep momentum, and tick off each task as you go.

Week	Focus	Actions	Done ✓
Week 1	Client & offer	Complete your ideal client snapshot, write your one-sentence offer and book a weekly sales hour	
Week 2	Pipeline	Set up your pipeline, add everyone you're in touch with and plan a next action for each	
Week 3	Outreach	Send your outreach message to at least ten people and contact two possible referral partners	
Week 4	Convert & follow up	Hold discovery calls using CLEAR, make clear offers, follow up and ask one client for a referral	

COMMIT TO IT

My ideal client is: _____

My goal for the next 30 days is: _____

The one thing most likely to stop me is: _____

What I'll do when that happens: _____

The person I'll tell to keep me accountable: _____

Notes

YOUR NEXT STEP

Ready to win more of the right clients?

You've done the thinking. Now let's turn it into a simple sales plan that fits the way you work.

Book your free 20-minute strategy call

In a relaxed, no-pressure call, we'll look at your answers from this workbook and work out:

- [ ] Who your best-fit clients are and how to reach them
- [ ] How to sharpen your offer so it's easy to say yes to
- [ ] A simple pipeline and follow-up routine you can stick to
- [ ] How to approach sales conversations with confidence

Book my free strategy call →

https://api.leadconnectorhq.com/widget/booking/scalesmart-strategy-call

Selling well isn't about being pushy. It's about helping the right people say yes with confidence. I'd love to help you do exactly that.

To your success,
Binta, Scale Smart

scalesmartcoaching.com