

THE ONE-PERSON SALES TOOLKIT

Companion Templates for The One-Person Sales Department

James Inglis

Appendix: The One-Person Sales Toolkit

The templates in this section are designed to be used, changed, shortened, and made your own.

Do not treat them as forms you must complete perfectly before you are allowed to sell anything. Their purpose is to get useful thinking out of your head and into a format you can work with.

Editable versions of these tools are available through the companion toolkit for this book. Use the digital versions when you want to save, revise, print, or reuse the worksheets without recreating them from the page.

Companion toolkit: OnePersonBusinessPlaybooks.com/sales-toolkit
No email signup is required.



Scan for the editable companion toolkit.

Template 1: Ideal Customer Profile Worksheet

Part A — Basic profile

Primary customer type:

What kind of company, organization, or individual do you serve best?

Typical size:

Revenue, employee count, locations, customer count, or another measure that matters.

Industries or business models that fit best:

Geography, if relevant:

Primary buyer role:

Other likely stakeholders:

Part B — Problem profile

What is usually happening when this customer needs you?

What pain, risk, cost, delay, or missed opportunity does the problem create?

What has the customer usually tried already?

What makes the problem urgent enough to act?

Part C — Trigger events

Check or add the events that may make the account more likely to buy:

- ☐ New executive
- ☐ Funding or investment
- ☐ Acquisition or merger
- ☐ Expansion
- ☐ New facility or location
- ☐ Rapid hiring
- ☐ New product or market
- ☐ Technology change
- ☐ Contract renewal
- ☐ Regulatory deadline
- ☐ Missed target
- ☐ Customer loss
- ☐ Restructuring
- ☐ Other: _____

Part D — Best-customer characteristics

List five qualities your best customers tend to share.

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Part E — No-go profile

List signs that a prospect is usually a poor fit.

- 6. _____
- 7. _____
- 8. _____
- 9. _____
- 10. _____

Final ICP statement

Complete this sentence:

*We do our best work with _____
who are dealing with _____ and
need to _____ because
_____.*

Keep the sentence plain. You are not writing website copy yet. You are giving yourself a targeting rule.

Template 2: Customer Fit Scorecard

Use this scorecard when deciding how much proactive attention an account deserves.

Score each factor from 1 (weak) to 5 (strong).

Factor	1	2	3	4	5	Score
Need	Minor issue				Important problem	—
Fit	Outside ICP				Excellent ICP match	—
Access	No route in				Direct access	—
Urgency	No timing				Clear reason to act	—
Value	Low potential				Strong economic/strategic value	—

Total score: _____ / 25

Suggested interpretation:

21–25: High-priority account.

16–20: Worth active attention.

11–15: Selective pursuit or nurture.

5–10: Low priority unless new information changes the picture.

Write the reason for the score in one sentence:

Next action:

Template 3: Offer Clarity Worksheet

Offer name

Give the offer a simple working name. It does not need to be clever.

Who is it for?

What problem does it solve?

Describe the problem in the customer's language.

What outcome should the buyer expect?

What is included?

- 11.

- 12.

- 13.

- 14.

- 15.

What is not included?

16. _____
17. _____
18. _____

Typical timing

Pricing model

- ☐ Fixed project fee
- ☐ Monthly retainer
- ☐ Subscription
- ☐ Hourly / daily
- ☐ Value-based / outcome-based
- ☐ Other: _____

Typical investment or range: _____

Proof that reduces risk

List the strongest evidence you can show a buyer.

Easy first step

What should an interested buyer do next?

One-sentence offer

*We help _____ achieve
_____ through
_____, typically over
_____.*

Template 4: Sales Message Builder

One-sentence core message

We help [specific customer] solve [important problem] so they can [valuable outcome].

Your version:

Ten-second version

What do you say when someone asks, “What do you do?”

Thirty-second version

Add the problem and your approach.

Two-minute version

Add a short example, proof, and the kind of situation that usually creates a need.

Problem message

What is happening in the buyer’s world?

Outcome message

What becomes better?

Differentiation message

Why are you a sensible choice compared with doing nothing, doing it internally, or hiring another provider?

Proof message

What specific evidence supports your claim?

Why-now message

What events or circumstances make the problem more urgent?

Plain-language test

Read the message aloud. Cross out anything you would never say in a real conversation.

Template 5: Pipeline Math Calculator

Start with your goal and work backward.

Annual new-business revenue goal: \$ _____

Average new sale: \$ _____

Wins required: Revenue goal ÷ Average sale = _____

Estimated close rate from qualified opportunity to win: _____%

Qualified opportunities required: Wins required ÷ Close rate = _____

Percent of meaningful sales conversations that become qualified: _____%

Sales conversations required: Qualified opportunities ÷ Qualification rate = _____

Percent of targeted prospecting efforts that create a meaningful conversation: _____%

Prospecting efforts required: Sales conversations ÷ Conversation rate = _____

Now divide the totals:

Per quarter: _____

Per month: _____

Per week: _____

Reality check

Does the required activity fit the capacity of a one-person business?

If not, do not immediately assume you need more activity. Consider whether you can improve:

- Average sale
- Targeting
- Conversation rate
- Qualification
- Close rate

- Repeat business
- Referrals

The best sales plan is often a better-converting plan, not simply a busier one.

Template 6: 100-Prospect Target Account List

Use a spreadsheet with these columns:

Field	What to capture
Priority	A / B / C
Company	Target account name
Website	Main URL
Industry	Relevant sector
Size	Revenue, employees, locations, or other useful measure
Why it fits	One sentence
Trigger	What changed or why now
Primary contact	Likely buyer
Title	Role
Secondary contact	Other stakeholder
Relationship	Mutual contact, former relationship, none
Source	Referral, research, event, LinkedIn, etc.
Last touch	Date
Status	Targeted, contacted, conversation, nurture, etc.
Next action	Specific next move
Next date	Date
Notes	Only useful context

Priority rule

A: Strong ICP fit plus a credible reason to engage now.

B: Strong ICP fit; timing unclear.

C: Possible fit; lower current value or relevance.

Do not try to build all 100 accounts in one sitting. Build 25, work the list, and learn what makes an account worthy of the next 75 slots.

Template 7: Five-Touch Outbound Sequence

Touch 1 — Initial email

Subject: Keep it simple and relevant.

Hi [Name],

I noticed [relevant trigger /business context]. Companies in that situation often run into [specific problem].

I help [type of customer] [specific outcome]. [One brief proof point, if useful.]

If this is something you are working through, would a short conversation be useful?

[Name]

Touch 2 — Light LinkedIn touch

Do not repeat the same pitch. Connect, follow, or engage with something relevant when appropriate.

Note: _____

Touch 3 — Follow-up with an angle

Hi [Name],

One reason I reached out: [short observation about the problem].

[One useful point, example, or question.]

If that is relevant to what you are seeing at [Company], happy to compare notes.

[Name]

Touch 4 — Value message

Share one useful asset:

- ☐ Checklist
- ☐ Case study
- ☐ Short article
- ☐ Benchmark
- ☐ Assessment
- ☐ Video /webinar
- ☐ Other: _____

Message:

Touch 5 — Close the loop

Hi [Name],

I may have caught you at the wrong time, so I'll close the loop rather than keep filling your inbox. If [problem] becomes a priority later, I'd be glad to reconnect.

Best,

[Name]

Sequence quality check

Before launching the sequence, answer:

Why this company? _____

Why this person? _____

Why now? _____

If you cannot answer at least two of the three, the outreach is probably not targeted enough.

Template 8: Referral Request Scripts

These are starting points. Change the language until it sounds like you.

General referral request

"We tend to do our best work with [type of customer] dealing with [specific problem]. If someone comes to mind, I'd always appreciate an introduction. No pressure if nobody does."

Specific-account introduction

"I noticed you know [Name] at [Company]. I'm hoping to learn more about how they are approaching [relevant issue]. Would you be comfortable making an introduction?"

After a client win

"I'm glad this is producing the result you wanted. We see the same issue in a lot of [type of company]. If you run across someone facing something similar, I'd be happy to talk with them."

Partner referral

"The easiest way to spot a good fit for me is [trigger / situation]. What should I listen for that would signal a good fit for you?"

Forwardable description

Write a two-sentence description a client or partner can paste into an introduction:

Template 9: Discovery Call Guide

You do not need to ask every question. Choose the ones that help you understand the situation.

Context

- What prompted the conversation?
- What has changed recently?
- What are you trying to accomplish over the next six to twelve months?
- How does the current process work today?
- Who is involved?

Your field-specific questions:

19. _____
20. _____

Problem

- Where is the current approach breaking down?
- How long has this been happening?
- What have you tried?
- Why has the issue been difficult to solve?
- What is the real problem underneath the visible symptom?

Notes:

Impact

- What does the problem cost in money, time, risk, customer experience, or opportunity?
- Who feels the impact most?
- What happens if nothing changes?
- Is there a measurable consequence?

Notes:

Priority

- Why address this now?
- What else is competing for attention?
- Is there a deadline or trigger?
- What happens if the decision moves back six months?

Notes:

Decision

- Who else needs to be involved?
- How are decisions like this normally made?
- Is budget available or does it need approval?
- Are you considering other approaches?
- What would make you confident enough to proceed?

Notes:

Next step

Before the call ends, write the next action and date.

Next action: _____

Owner: _____ **Date:** _____

Template 10: FITS+ Qualification Scorecard

Score each dimension from 1 to 5.

Dimension	Question	Score
Fit	Is this the kind of customer and work we want?	____ / 5
Impact	Is the problem important enough to fund?	____ / 5
Timing	Is there a real reason to act?	____ / 5
Stakeholders	Do we understand the people needed for a decision?	____ / 5
Money	Is there a realistic economic path?	____ / 5

Total: _____ / 25

Evidence

Fit: What supports the score?

Impact: What happens if the problem remains?

Timing: Why now?

Stakeholders: Who matters?

Money: What do we know about budget or economic value?

Decision

- ☐ Advance
- ☐ Clarify
- ☐ Nurture
- ☐ Close out

Next action: _____

Date: _____

Template 11: One-Person Proposal Template

[CLIENT NAME]

Proposal for: [Project / Outcome]

Prepared by: [Your Name / Company]

Date: [Date]

1. Situation

Summarize what you heard. Use the buyer's language. Keep this section focused on the customer, not your company.

[Client] is currently _____. The
primary challenge is _____.
This matters because _____.
The organization would like to
_____ by
_____.

2. Objectives

At the end of the engagement, the client should be able to:

21. _____
22. _____
23. _____

3. Recommended approach

Describe the approach and why it fits the situation.

4. Scope and deliverables

Phase 1: _____

Purpose: _____

Deliverables: _____

Phase 2: _____

Purpose: _____

Deliverables: _____

Phase 3: _____

Purpose: _____

Deliverables: _____

5. Client responsibilities

The client will provide:

- _____
- _____
- _____

6. Timing

Start: _____

Key milestones: _____

Target completion: _____

7. Investment

Professional fee: \$ _____

Payment terms: _____

Expenses, if any: _____

8. Optional choices

If useful, present real choices rather than artificial tiers.

Option A: _____

Option B: _____

Option C: _____

9. Next step

To proceed:

Decision target date: _____

Template 12: Objection Response Planner

Create one row for each objection you hear regularly.

Objection	What it may really mean	Clarifying question	Useful response	Walk-away signal
“Too expensive”				
“Need to think”				
“Not now”				
“We have someone”				
“Send information”				

Response framework

- Acknowledge:** Show you heard the concern.
- Clarify:** Ask what the buyer means.
- Explore:** Understand what sits underneath it.
- Respond:** Address the real concern.
- Confirm:** Ask whether the concern is resolved.
- Write one reminder to yourself for difficult conversations:

A useful one is: **Do not answer faster than you understand.**

Template 13: Simple CRM Layout

Use this in a spreadsheet or recreate it in your CRM.

Field	Example
Account	Northstar Components
Primary contact	Dana Lewis
Role	VP Sales
Opportunity	Sales Process Buildout
Stage	Qualified

Potential value	\$18,000
Source	Referral — Sam Reed
Business problem	Pipeline inconsistent before planned hiring
Impact	Poor visibility; founder still rescuing deals
Timing	Wants system in place before Q1 hiring
Stakeholders	VP Sales, CEO, CFO
Last activity	Discovery call 9/12
Next action	Send case study and schedule CFO call
Next date	9/16
Notes	Budget likely available in November plan

Recommended stages

- 24. Target
- 25. Contacted
- 26. Conversation
- 27. Qualified
- 28. Proposal
- 29. Decision
- 30. Won
- 31. Lost /Nurture

Weekly hygiene rule

Every active opportunity must have:

- An accurate stage
- A next action
- A next-action date

If one of those is missing, fix it during the weekly review.

Template 14: Weekly Sales Dashboard

Activity

Metric	This Week	Month to Date	Goal
New target accounts	____	____	____
First-touch outreach	____	____	____
Follow-ups	____	____	____
Referral requests	____	____	____
New conversations	____	____	____
Qualified opportunities	____	____	____
Proposals	____	____	____

Wins	_____	_____	_____
Revenue won	\$_____	\$_____	\$_____

Pipeline health

Qualified pipeline value: \$ _____
Near-term revenue needed: \$ _____
Approximate coverage: _____ x
Oldest stalled opportunity: _____
Opportunity needing attention this week: _____

Learning

What worked?

What did not?

One change for next week:

Template 15: Five-Hour Sales Week Planner

Hour 1 — Pipeline

Calendar slot: _____
Tasks:

- ☐ Review every active opportunity
- ☐ Update stages
- ☐ Add next actions and dates
- ☐ Close out dead deals
- ☐ Check pipeline coverage

Hour 2 — Prospects

Calendar slot: _____
Tasks:

- ☐ Add new target accounts
- ☐ Look for triggers
- ☐ Identify likely buyers
- ☐ Check warm connections

- ☐ Select this week's outreach list

Hour 3 — Outreach

Calendar slot: _____

Tasks:

- ☐ Send first-touch messages
- ☐ Make calls
- ☐ Ask for introductions
- ☐ Send LinkedIn outreach where appropriate

Hour 4 — Follow-up

Calendar slot: _____

Tasks:

- ☐ Follow up after meetings
- ☐ Advance proposals
- ☐ Send promised material
- ☐ Reconnect after known dates
- ☐ Nurture later-stage timing

Hour 5 — Improve

Calendar slot: _____

Tasks:

- ☐ Review metrics
- ☐ Improve one message or template
- ☐ Create one useful content asset
- ☐ Practice one objection or sales scenario
- ☐ Automate or remove one low-value task

Busy-week minimum

Even during a difficult week, I will do:

New targets: _____

First touches: _____

Follow-ups: _____

Referral requests: _____

Pipeline review: ☐ Yes

Template 16: Customer Expansion and Referral Plan

Complete one page for each strong client.

Client: _____

Original problem: _____

Value delivered: _____

Evidence of success: _____

Possible next need

What adjacent, deeper, longer, or more strategic need may emerge?

Expansion trigger

What event would make that next need timely?

Referral opportunity

Who else might have a similar problem?

Proof asset

- ☐ Testimonial
- ☐ Case study
- ☐ Metric / result
- ☐ Reference
- ☐ Before-and-after example

What permission is needed? _____

Reconnect date

Next action

Template 17: 90-Day Authority Content Planner

Choose three buyer problems that appear repeatedly in sales conversations.

Buyer Problem 1

Problem:

Point-of-view post: _____

Practical resource: _____

Proof asset: _____

Where it fits in sales: _____

Buyer Problem 2

Problem: _____

Point-of-view post: _____

Practical resource: _____

Proof asset: _____

Where it fits in sales: _____

Buyer Problem 3

Problem: _____

Point-of-view post: _____

Practical resource: _____

Proof asset: _____

Where it fits in sales: _____

Repurposing checklist

For every strong piece of content, ask whether it can become:

- ☐ Email follow-up
- ☐ LinkedIn post
- ☐ Checklist
- ☐ Webinar topic
- ☐ Sales-call talking point
- ☐ Proposal proof
- ☐ Newsletter item
- ☐ Client resource

The goal is not more content. It is more use from good content.

Template 18: AI Sales Prompt Library

Use these as starting points. Replace bracketed text with your own context. Always review facts, tone, promises, and confidential information before using the output.

Prompt 1 — Account briefing

I am preparing for a sales conversation with [company]. I help [ICP] solve [problem]. Based on the information I provide below, create a one-page briefing covering: important company context, relevant recent changes, possible business implications, likely stakeholders, assumptions I should avoid, and five discovery questions. Distinguish facts from hypotheses. [Paste information.]

Prompt 2 — Trigger-event relevance

Here is a recent event at a target account: [event]. My offer helps [customer] achieve [outcome]. Give me three credible ways this event could create a need for my work, and three reasons it might not. I want a balanced view, not a sales pitch.

Prompt 3 — Cold-email first draft

Draft a cold email under 100 words to [role] at [company]. Reason for contact: [trigger]. Problem I solve: [problem]. Proof: [proof]. Use plain English. No generic compliment, no “hope you’re well,” no buzzwords, no fake urgency, and no calendar link. The goal is to earn a short conversation, not sell the whole engagement.

Prompt 4 — Discovery preparation

I am meeting with [role/company] about [issue]. Give me 12 possible discovery questions organized under Context, Problem, Impact, Priority, Decision, and Next Step. Avoid questions that sound scripted. Include two questions that would help uncover whether the visible problem is only a symptom.

Prompt 5 — Call debrief

Review these meeting notes. Summarize: stated problem, underlying problem if evident, business impact, urgency, stakeholders, budget context, decision process, concerns, commitments, next action, and unanswered questions. Do not invent information. Mark unknown items as unknown. [Paste notes.]

Prompt 6 — Follow-up email

Using the meeting notes below, draft a concise follow-up email. Thank the buyer, summarize the two or three most important points in their language, list commitments by each side, and confirm the next step and date. Keep the tone direct and human. [Paste notes.]

Prompt 7 — Proposal quality check

Review this proposal as a skeptical buyer. Identify where the situation is unclear, outcomes are vague, scope is ambiguous, proof is weak, pricing lacks context, or the next step is missing. Do not rewrite yet. First give me the five highest-impact improvements. [Paste proposal.]

Prompt 8 — CFO objection practice

Act as a cautious CFO evaluating a proposed [type of engagement] priced at [amount]. The business problem is [problem] and expected outcome is

[outcome]. Give me the six strongest objections or questions you would raise. Then interview me one question at a time so I can practice answering.

Prompt 9 — Sales call coaching

Review this sales-call transcript. Tell me where I talked too much, jumped to a solution too quickly, missed a useful follow-up question, failed to quantify impact, or left the next step unclear. Quote only short phrases needed to identify the moment. Give me five coaching points and a better question I could have asked in each case. [Paste transcript.]

Prompt 10 — Pipeline review

Here is a list of active opportunities with stage, last activity, next action, timing, and FITS+ notes. Identify deals that appear stalled, deals with weak qualification, deals that lack a next step, and deals that may deserve more attention. Explain the reason for each flag. Do not change stages automatically. [Paste pipeline.]

AI review checklist

Before sending any AI-assisted sales content, ask:

- ☐ Are the facts correct?
- ☐ Does this sound like me?
- ☐ Is every claim supportable?
- ☐ Did the system invent a customer result, capability, or source?
- ☐ Is confidential information handled appropriately?
- ☐ Would I be comfortable saying this aloud to the buyer?
- ☐ Is a human relationship being automated where it should not be?

A Final One-Page Sales Operating System

If you use nothing else from the toolkit, use this page.

My target customer

The problem I solve

My core offer

My one-sentence message

My weekly pipeline-creation target

New target accounts: _____

First touches: _____

Follow-ups: _____

Referral requests: _____

My pipeline stages

Target → Contacted → Conversation → Qualified → Proposal → Decision → Won / Lost

My qualification rule

I will not write a major proposal until I understand:

- ☐ Fit
- ☐ Impact
- ☐ Timing
- ☐ Stakeholders
- ☐ Money

My next-action rule

Every active deal has a specific next action and date.

My five-hour sales schedule

Pipeline: _____

Prospects: _____

Outreach: _____

Follow-up: _____

Improve: _____

My quarterly review date

The principle I want to remember

Predictable revenue starts with predictable behavior.

Bonus Implementation Guide: Build Your Sales Department in 30 Days

A playbook is useful only if it changes what happens on Monday morning.

The easiest way to get stuck after reading a business book is to try to install everything at once. You redesign the CRM, rewrite your website, buy a prospecting tool, build a lead magnet, create a new proposal, and decide you should probably post on LinkedIn every day. By the end of the week you have seventeen tabs open and less selling happening than before.

Do the opposite.

Build the system in four short stages. The goal is not to create a finished sales machine in thirty days. The goal is to have a working version you can improve while using it.

Week 1: Decide who you want and what you are selling

The first week is about focus.

If the target and the offer are fuzzy, every later step becomes harder. Outreach sounds generic. Discovery calls wander. Proposals become custom. Referrals are vague. The CRM fills with people who were never likely to buy.

Day 1 — Review your last ten customers or opportunities

Look backward before you look forward.

For each customer or serious prospect, write down:

- What they bought or considered buying
- Approximate revenue
- How they found you
- How easy the sale was
- How profitable the work was
- How much you enjoyed the work
- Whether the client referred or could refer others
- Whether you would actively pursue another customer just like them

You are looking for patterns.

Sometimes the customer who paid the largest fee was not actually the best customer. The project may have required excessive customization, endless meetings, and work you do not want to repeat.

Sometimes a smaller project turns out to be the better model because it led to recurring work, referrals, and a clean delivery process.

Your future ICP should be informed by what actually happened, not only by what sounds attractive.

Day 2 — Draft the ICP and no-go profile

Complete the Ideal Customer Profile Worksheet.

The One-Person Sales Department | Companion Toolkit

Do not spend hours debating whether your ideal company has 50 employees or 75. Use ranges.

The more important questions are usually:

- What business situation creates need?
- Who owns the problem?
- How expensive or painful is it?
- What makes the company willing to act?
- What kind of customer lets you do your best work?

Then write the no-go profile.

This step is important because solo businesses get into trouble from customers they should not have pursued in the first place.

A no-go profile may include buyers who need constant emergency access, projects below a minimum economic size, organizations with a procurement burden too large for the fee, or work that requires capabilities you cannot support alone.

Day 3 — Define the core offer

Choose one offer to make clearer.

Do not redesign the entire business.

Use the Offer Clarity Worksheet and answer:

- Who is it for?
- What problem does it solve?
- What outcome does it create?
- What is normally included?
- What is normally excluded?
- How long does it take?
- How is it priced?
- What evidence reduces risk?
- What is the first step?

If your offer still requires a paragraph beginning with “It depends,” keep working.

Some parts will depend. The buyer should still understand the basic shape.

Day 4 — Build your message

Write the ten-second, thirty-second, and two-minute versions.

Then test them with one person who understands business but does not work inside your specialty.

Do not ask whether the message sounds impressive.

Ask:

“What do you think I actually help someone do?”

If their answer is close to what you intended, the message is working.

If they repeat vague language such as “strategy,” “transformation,” or “solutions” without being able to explain the problem, simplify it.

Day 5 — Create your initial scorecard

Set up the Customer Fit Scorecard and FITS+ Qualification Scorecard.

You now have two filters:

The first decides which accounts deserve prospecting attention.

The second decides which active opportunities deserve sales attention.

That distinction will save time later.

End-of-week outcome

By Friday, you should have:

- One primary ICP
- One no-go profile
- One core offer
- One clear sales message
- One account-fit scorecard
- One opportunity qualification scorecard

That is enough foundation to begin.

Week 2: Build a small pipeline system

The second week turns focus into a working list and a place to manage it.

Day 6 — Do the pipeline math

Use your revenue target and average sale to calculate a rough number of wins, qualified opportunities, conversations, and prospecting efforts needed.

Do not worry if the numbers are estimates.

Write the assumptions beside them.

For example:

“Assuming a 30 percent close rate from qualified opportunity.”

Three months from now, replace assumptions with actual data.

The purpose today is to understand whether your sales plan is plausible.

If the math says you need 200 conversations a month and you can realistically handle 20, one of the economics has to change.

Day 7 — Build the first 25 target accounts

Do not start with 100.

Choose 25 companies or buyers that fit well enough to deserve attention.

For each one, record:

- Why it fits
- Likely buyer
- Relevant trigger
- Warm connection, if any
- Priority A, B, or C

Do not fill the list with names simply to reach 25.

A blank row is better than a bad prospect.

Day 8 — Find the warm paths

Review the 25 accounts and your broader network.

Ask:

- Who have I worked with before?
- Who knows these companies?
- Which former clients may have moved to new organizations?
- Which partners serve the same market?
- Who could provide insight even if they cannot provide an introduction?

Reach out to three warm contacts today.

Not next week.

Today.

A message can be simple:

“I’m focusing more of my work on [type of company/problem]. You know this market well. I’d value your perspective on which companies are taking this issue seriously right now.”

You are not asking everyone for a lead. You are learning and reconnecting.

Day 9 — Set up the minimum CRM

Choose your system.

A spreadsheet is fine.

A lightweight CRM is fine.

The wrong choice is the system you will not maintain.

Create the stages:

Target → Contacted → Conversation → Qualified → Proposal → Decision → Won/Lost

Add every existing active opportunity.

Then add a next action and date.

You may be surprised how many “active” deals have no next action.

That is useful information.

Day 10 — Schedule the five-hour week

Put recurring sales blocks on the calendar for the next eight weeks.

Do it before the calendar fills.

If five separate one-hour blocks work, use them.

If Tuesday and Thursday mornings are easier, use two larger blocks.

The exact pattern matters less than pre-commitment.

At the end of Week 2, your sales department should have somewhere to work from.

Week 3: Start conversations

Week 3 is deliberately action-heavy.

This is where planning becomes selling.

Day 11 — Write the first outbound sequence

Choose one segment and one reason for contacting it.

Write the five-touch sequence.

Keep the first email short.

If the draft feels clever, simplify it.

If the draft could be sent to 10,000 people unchanged, make it more relevant.

Day 12 — Send the first ten messages

Do not spend the entire day preparing.

Send ten.

Record them in the CRM.

Then stop and get back to paid work.

The point is to prove that prospecting can fit into the business rather than taking it over.

Day 13 — Ask for introductions

Choose three people who know and trust you.

Make specific asks.

Weak:

“Know anybody who needs sales help?”

Stronger:

“I’m looking to meet owners of B2B firms with 20 to 100 employees that have grown through referrals but now need a more repeatable pipeline. Does anyone come to mind?”

If a specific account connection exists, ask for that introduction.

Day 14 — Create one sales-enabling asset

Pick one question buyers ask repeatedly.

Create the smallest useful asset that answers it.

A one-page checklist is enough.

A short article is enough.

A two-page case study is enough.

Do not decide that you need a 30-page ebook before you can follow up with a prospect.

The asset has a job: make the next conversation easier.

Day 15 — Practice discovery

Take the Discovery Call Guide and run a 20-minute practice conversation.

You can role-play with another person or use an AI assistant.

Pay attention to one behavior in particular:

How quickly do you start solving?

If you jump into recommendations after the first problem statement, practice asking two more questions before offering a point of view.

That small change can dramatically improve real discovery calls.

End-of-week outcome

You should now have activity in the real world:

- Outreach sent
- Referral requests made
- Follow-ups scheduled
- A useful content asset
- A discovery process you have practiced

The sales department is no longer theoretical.

Week 4: Tighten the process

The final week is about making the work repeatable.

Day 16 — Build your proposal shell

Create the reusable proposal structure before you need it.

Include:

Situation

Objectives

Approach

Scope

Timing

Investment

Responsibilities

Next step

Do not fill it with boilerplate simply because you have room.

A template should remove repetitive formatting, not repetitive thinking.

Day 17 — Build the objection planner

Write down the objections you hear most often.

Then write clarifying questions before writing answers.

This order matters.

If you prepare only rebuttals, you will be tempted to use them too quickly.

Your job is to understand which version of the objection you are hearing.

Day 18 — Build the weekly dashboard

Set up the handful of metrics you will review weekly.

Do not backfill a year of data unless it is easy.

Start now.

Track activity and outcomes for the next eight weeks.

At that point you will have enough information to improve assumptions.

Day 19 — Review customer expansion

Choose five current or recent customers.

For each one, ask:

- What value did we create?
- Is there an obvious next need?
- Is there a reasonable referral request?
- Can we capture proof?
- When should I reconnect?

Send at least one relationship-driven message today.

Do not make it a disguised pitch if there is no real reason to pitch.

Day 20 — Run the first sales review

Set aside 45 minutes.

Review the entire system:

Targeting: Are the accounts good enough?

Messaging: Are people understanding why you reached out?

Activity: Did you actually complete the planned sales work?

Pipeline: Does every live opportunity have a next action?

Qualification: Are weak deals being kept alive because you dislike closing them out?

Follow-up: Did you do what you said you would do?

Tools: What felt unnecessarily difficult?

Then choose one change for the next month.

Only one.

Do not rebuild the machine after two weeks of data.

Days 21–30: Repeat instead of reinvent

The last ten days are intentionally less exciting.

Run the weekly rhythm again.

Add prospects.

Send outreach.

Follow up.

Hold conversations.

Update the CRM.

Review the pipeline.

Make one improvement.

This period matters because it begins to turn a project into a habit.

The first two weeks of any new system have novelty working in their favor. The test is what happens after novelty disappears.

If the five-hour sales rhythm starts to feel boring, that may be progress.

A dependable operating system often feels boring from the inside.

You know what happens next.

You do it.

The pipeline gets a little healthier.

You learn which prospects respond.

Your qualification becomes sharper.

Your proposals get easier to write.

Your follow-up gets faster.

Eventually, the sales department stops feeling like a separate project and becomes part of the way the business runs.

That is the objective.

Five common traps during implementation

Trap 1 — Buying tools instead of building the process

A new CRM can make you feel organized for about three days.

If your ICP is unclear and your follow-up is inconsistent, the new system will become an expensive place to store the same confusion.

Build the operating rules first.

Trap 2 — Rewriting everything before contacting anyone

You do not need a new website, logo, pitch deck, and LinkedIn banner before you can have a conversation.

Improve the message enough to test it.

Let real conversations show you what needs further work.

Trap 3 — Automating too soon

Do something manually long enough to understand what good looks like.

Then automate the stable parts.

If you automate a weak message, you simply create weak outreach faster.

Trap 4 — Measuring too early

Ten emails do not prove a channel works or fails.

One lost proposal does not prove the price is wrong.

One great referral does not mean referrals can support the entire revenue plan.

Collect enough data to see patterns.

Trap 5 — Letting client work erase the system

This is the big one.

The moment client work gets busy, your brain will tell you that sales can wait.

Some sales tasks can wait.

The system cannot disappear.

Protect the minimum rhythm.

A five-hour week can become a three-hour week temporarily. A ten-message goal can become five.

But keep the machine running.

Your thirty-day checkpoint

At the end of thirty days, do not judge the system only by revenue closed.

Some sales cycles are longer than that.

Judge whether you now have:

The One-Person Sales Department | Companion Toolkit

- A clearer target
- A clearer offer
- A usable message
- A real target-account list
- A working CRM
- Consistent prospecting
- Better discovery
- A qualification rule
- A reusable proposal
- A weekly sales rhythm
- More honest visibility into the pipeline

If those things are true, you have built the foundation of a sales department.

Now the job is repetition and improvement.

You do not need another thirty-day challenge.

You need next Monday's five hours.

Quick Reference: Twelve Rules for a One-Person Sales Department

When the business gets busy, you will not remember every worksheet, framework, and example in this book. You do not need to.

These twelve rules are the short version.

1. Do not sell to everybody

A broad market feels safer but usually creates weaker messaging and more wasted effort. Choose the customers where your relevance is strongest and where the problem is important enough to fund.

You can still accept an unexpected opportunity. Your target simply tells you where proactive effort belongs.

2. Make the offer easier to understand than the work itself

Your expertise may be complicated. The buying decision should not be.

A prospect should understand who the offer is for, what problem it solves, what changes, how the engagement works, and what happens next.

Clarity is not oversimplification. It is courtesy.

3. A first message should earn a conversation, not close a sale

Do not put the entire business into a cold email.

Give the buyer a reason to understand why you contacted them. Connect to a relevant problem or trigger. Explain your relevance briefly. Offer a low-friction next step.

Then stop writing.

4. Keep creating pipeline when the pipeline looks healthy

The most dangerous time to stop prospecting is when you are busy.

That is when the future gap is quietly being created.

Maintain a small minimum rhythm even during delivery-heavy weeks.

5. Interest is not intent

A prospect can be warm, complimentary, and genuinely curious without being a real opportunity.

Look for evidence: impact, timing, stakeholders, economics, and a concrete next step.

A polite pipeline is not the same as a healthy one.

6. Diagnose before you prescribe

Experts recognize patterns quickly. That is useful until it makes you stop listening.

Ask enough questions to understand context, problem, impact, priority, and decision process before recommending the solution.

The fastest way to lose credibility is to solve the wrong problem confidently.

7. Do not write surprise proposals

Before you invest time in a proposal, the buyer should already understand the basic approach and approximate economics.

If the scope, price, or recommendation is a surprise when the document arrives, discovery was incomplete.

8. Every active opportunity needs a next action and a date

This one habit can carry a simple CRM a long way.

“Waiting” is not a next action.

“Follow up Friday after leadership review” is.

If you cannot identify what happens next, decide whether the opportunity is truly active.

9. Follow-up should add value or clarity

Repeated “checking in” eventually becomes wallpaper.

Add a useful observation, resource, example, question, or decision point when you can.

And know when to close the loop.

10. Protect price by changing the exchange

If a buyer needs to spend less, change scope, timing, access, terms, or deliverables before automatically discounting.

A lower price can be appropriate. It should be a conscious trade, not a nervous reaction.

11. Use AI to remove friction, not responsibility

Let software help with research, preparation, summaries, drafts, CRM administration, and practice.

Keep judgment, promises, sensitive conversations, and relationships human.

The goal of automation is to create more room for good selling, not to eliminate the buyer from the process.

12. Build the process before you build the team

If you eventually hire sales help, give that person a clear ICP, a proven offer, a useful message, qualification rules, stages, templates, and evidence of what converts.

Do not outsource the discovery of your own sales model unless you are prepared to pay for a great deal of learning.

And remember: you may never need a sales team.

A one-person business with a strong reputation, a focused offer, disciplined follow-up, and a healthy referral network can be a very good business indeed.

The objective is not headcount.

The objective is a company that can keep creating the right opportunities without putting its owner through a revenue emergency every few months.

A Note Before You Put This Down

There is a temptation at the end of a business book to feel briefly motivated and then return to exactly the same week you were having before you opened it.

Try not to let that happen here.

You do not need to implement the entire system tomorrow. You do need to make one visible change.

Choose the part of your sales process that currently causes the most friction.

If the pipeline is thin, build the first 25 target accounts.

If the pipeline is full of vague possibilities, score the opportunities with FITS+ and close out the ones that are not real.

If prospects seem interested but proposals disappear, improve discovery before changing the proposal template.

If you are losing track of follow-up, install the next-action rule today.

If sales disappears whenever client work gets busy, put the first recurring sales block on your calendar before you do anything else.

The system does not become real when the worksheets are complete.

It becomes real when your behavior changes.

That is also why you should resist the urge to copy every example exactly. Your market may be different. Your buyers may dislike phone calls. Your sales cycle may be nine months instead of nine days. Your best opportunities may come almost entirely through partners. Your offer may be so specialized that a list of fifty accounts is more than enough.

Good.

Use the principles and adapt the mechanics.

The most durable sales system is the one that fits the business you actually want to run.

You may decide that growth means higher-value work with fewer clients. You may want to remain a one-person company indefinitely. You may eventually build a small team. None of those choices is inherently more ambitious than another.

What matters is that the business can create opportunities deliberately rather than waiting for revenue to appear.

That is a form of freedom.

When you can see the pipeline, understand the math, choose the customers, run the conversations, and maintain the rhythm, sales becomes less mysterious. It still contains uncertainty. It always will. But uncertainty is easier to live with when your side of the process is under control.

Start small.

Keep the system honest.

And next week, run it again.

The tools in this book are intentionally simple. Simplicity makes them easier to use, easier to teach, and easier to maintain when the rest of the business gets complicated. A sales system does not become better merely because it contains more fields, more stages, more automation, or more terminology. It becomes better when it helps you make sound decisions consistently. Keep what helps. Remove what does not. The strongest one-person sales department will always be the one you can actually run.