Sales Training Master Deck

GetBiz.Credit System + Bulletproof Biz Credit & Asset Protection System™

Internal Use Only • Version v1.0

ORIENTATION

What This Training Produces

A repeatable, compliant, high-conversion sales operating system for new and experienced reps.

Skills

- Executive tone and consultative control
- Discovery-led selling and qualification
- Objection handling without pressure
- Follow-up discipline and pipeline growth

Offer Mastery

- GetBiz.Credit membership positioning
- Bulletproof premium program qualification
- Ethical framing and compliant language
- Clear next steps and onboarding cadence

Manager System (Retention + Performance)

- Live call coaching, role-plays, and call reviews
- Behavior-first scoreboards and leader bulletin
- Weekly accountability and trend coaching
- Consistent motivation: tie each rep's "why" to daily behaviors and deadlines

RULES OF ENGAGEMENT

Professional, Compliant, Attorney/CPA-Ready

- Use executive, formal language — no slang, no hype, no exaggerated guarantees.
- Do not promise funding approvals, limits, timelines, legal outcomes, or tax outcomes.
- Use approved disclaimers: educational program; consult licensed professionals as needed.
- Document client conversations in CRM: notes, next steps, and follow-up schedule.
- When in doubt: escalate to leadership — protect the client and the enterprise.

Trainer reminder: This deck teaches a “help-first” selling posture — trust is the asset.

MINDSET

Sell Without Selling

Your role is “Business Growth Concierge”: diagnose, guide, and protect the client’s interests.

What We Do

- Lead with questions — not pitches
- Translate complexity into a clear roadmap
- Recommend the right level; protect fit
- Create confidence through clarity

What We Never Do

- Pushy pressure tactics
- “Guaranteed approvals” language
- Give legal/tax advice as fact
- Overshare proprietary steps

The Trust Equation

Competence (offer clarity) + Consistency (follow-up) + Integrity (ethical standards) = Long-term clients + referrals
Train ethical practices early; quality business compounds over time.

TALENT

The Ideal LIHG Sales Professional

We recruit for traits; we train for skills.

Core Traits (Non-Negotiable)

- Coachable and accountable
- Competitive (against self and standard)
- Audacious: initiates conversations
- Ethical: protects the client & brand
- Follow-up discipline: does not quit leads

Behavior Signals in Week 1

- Shows up prepared for hot transfers
- Uses scripts, then adds personality
- Takes notes; schedules next steps
- Asks for role-play and feedback
- Tracks activity daily (CRM + report)

Manager principle: Track behaviors first, then results. Behaviors create results.

Daily → Weekly → Monthly accountability and trend coaching are mandatory.

ENABLEMENT

Most Effective Skill-Building Sequence

We win faster by showing, then doing — not by lecturing.

1 **Live appointments**
Shadow real client conversations

2 **Live calls**
Listen to real hot transfers

3 **Role-play**
Rehearse objections and closes

4 **Call review**
Watch recordings; score specific behaviors

5 **Training sessions**
Short focused modules; repeat weekly

6 **Manual + scripts**
Reference tools; reinforce consistency

Manager Tip

Record great calls, then build a "best-of" library to train 24/7.

Tools scale what your time cannot.

CADENCE

Start Strong • Track Behaviors • Finish Clean

A predictable routine improves performance and retention.

Morning (15 min)

- Quick win + “why” reminder
- Today’s focus metric
- Script drill (2 objections)
- Hot transfer readiness

Midday (10 min)

- Pipeline check
- Follow-up block
- Micro-coaching: tone + questions
- Update CRM notes

Close (10 min)

- Daily report
- Schedule next steps
- Book tomorrow follow-up
- Log wins/lessons

Leader Bulletin (Updated Daily)

Track both: (1) Behaviors (dials, connects, follow-ups) and (2) Results (enrollments, revenue).

A bulletin not updated daily is a dying sales office.

EXECUTION

Follow-Up Is the Skill That Guarantees Success

Most sales are not lost — they are abandoned.

Minimum Standard

- Every call ends with a next step (time + date).
- 48-hour follow-up window after first contact.
- Multi-channel touches: phone + email + text.
- Always provide value: checklist, recap, or next step.

Why It Works

- Expands pipeline while conditions change
- Signals professionalism and stability
- Creates trust over time
- Converts “not now” into “yes”

Rule: If it is not scheduled in the CRM, it does not exist.

Follow-up is discipline — train it early, measure it daily, and coach it weekly.

METRICS

Track Behaviors First, Then Results

If behaviors are correct and consistent, results become predictable.

Behaviors (Lead Indicators)

- Dials / connects / conversations
- Follow-up touches scheduled and completed
- Discovery calls conducted
- Proposals/links sent and confirmed received

Results (Lag Indicators)

- Enrollments by level
- Revenue collected
- Retention / chargeback events
- Referrals generated

Review cadence: Daily scoreboard • Weekly 1:1 coaching • Monthly performance reset

Use trend coaching: identify the behavior that moves conversion and reinforce it.

SETUP

Day 0 Checklist (Technical Readiness)

A rep with broken tools is a rep with broken confidence.

- Microsoft 365: Teams + Outlook configured
- Softphone installed (MicroSIP) and voicemail setup
- Support portal login + Knowledge base access
- CRM login verified; tags/stages reviewed
- Daily report process confirmed (submit before deadline)

Standard: No one takes hot transfers until this checklist is complete.

Module A

GetBiz.Credit® Offer Mastery

Positioning • Sales Conversation • Objections • Close • Onboarding

MARKET

The Problem We Solve

Business owners need capital — but most are structurally unprepared to access it efficiently.

Owner Reality

- Personal credit carries the business
- Funding applications are confusing and inconsistent
- Denials or weak approvals slow growth
- Owners do not have a clear roadmap

Our Position

- We provide a step-by-step business credit roadmap
- We supply tools (dashboard + app + training)
- We guide owners — we do not “sell pressure”
- We focus on fundability and professionalism

You are not selling “credit.” You are selling a pathway to growth and stability.

Lead with clarity; let the owner feel helped, not sold.

SYSTEM

The GetBiz.Credit System (What)

Explain the “what” clearly — do not give away proprietary “how” steps.

Core Components

- Interactive dashboard (roadmap + resources)
- Mobile app accountability partner
- Training library: video/audio/worksheets
- Vendor directory and reporting guidance

Roadmap

- Foundation and compliance setup
- Starter vendor trade lines
- Revolving accounts and higher tiers
- Funding readiness path (as appropriate)

Positioning sentence:

“This is a guided business credit infrastructure system — tools + roadmap + accountability — so you can build fundability over time.”

PACKAGING

Membership Positioning

Recommend based on fit: stage, urgency, complexity, and desire for support.

Basic

Entry access and essentials
Best for: self-starters
Position: “DIY roadmap”

Gold

Expanded support + resources
Best for: guided builders
Position: “accelerated clarity”

Platinum

Advanced resources & guidance
Best for: growth-stage owners
Position: “serious execution”

VIP

Highest-touch support
Best for: urgency + complexity
Position: “concierge help”

Compliance reminder: Avoid “guaranteed approvals.” Discuss “positioning and readiness” instead.

If asked about outcomes: explain variables and focus on process + support.

INTERNAL

Commission Structure (High-Level Summary)

Use as internal guidance; follow the executed agreement for exact terms.

Payout Mechanics

- 80% paid on the client payment (per schedule)
- 20% held as chargeback reserve
- Reserve begins paying out starting month 6
- Reserve pays in equal installments over 6 months (active status required)

Commission Tiers (Example)

- Gold/Platinum: higher rate at higher weekly volume
- VIP: tiered commission by volume
- Chargebacks/refunds may offset reserve and/or future commissions

Manager note: coach reps to sell for fit and retention — chargebacks destroy earnings.

Ethical sales practices reduce chargebacks and increase referrals.

PROCESS

5-Step Sales Conversation Framework

A consistent skeleton + your personality = scalable performance.

1) Open & Control

Confirm context, time, and agenda; set professional tone.

2) Discovery

Stage, goals, constraints, current setup, timeline, decision-maker.

3) Diagnose & Teach

Explain what business credit is and what “fundability” requires (high-level).

4) Recommend

Match membership level to needs; explain tools and support.

5) Close & Next Steps

Enroll, schedule onboarding, confirm first action + follow-up.

QUESTIONS

Discovery That Builds Trust

Ask questions that reveal fit and urgency — then recommend with confidence.

Core Questions (Use These Verbatim)

1) What is your primary goal for the next 90 days?
2) What is your biggest constraint: cash flow, funding, or structure?
3) How are you currently funding purchases — personal cards, loans, or business accounts?
4) Do you have an EIN and business bank account already?
5) What would success look like in 6–12 months?
6) Who else is involved in the decision?

Client Stage

- Startup: forming and needs structure
- Growth: needs funding to expand
- Scale: wants leverage and separation

Best Practice

End discovery with: “Based on what you told me… here is what I recommend and why.”

CONFIDENCE

Objection Handling: The Solution Sandwich

Acknowledge → Story/Proof → Specific solution → Confirm.

Four-Step Method

1) Acknowledge: “That’s a fair concern.”
2) Reframe: tie back to their goals
3) Provide a specific path inside the system
4) Confirm: “Does that solve the concern?”

Common Objections (Examples)

- “How fast can I get funding?”
- “Can you guarantee approvals?”
- “Why should I trust this?”
- “I need to think about it.”

Compliance rule: Never answer “guarantee” questions with certainty. Explain variables and the process.

If needed: offer a follow-up call after they review materials.

CONVERSION

Close With Clarity (Not Pressure)

Recap value, confirm fit, create urgency responsibly, and direct next steps.

Close Script (Template)

"Based on your goals (X) and timeline (Y), I recommend (Level)."
"Here is what you get and the first step we will complete together."
"If we get you enrolled today, we can schedule onboarding immediately."
"Would you like to start with (Level) now?"

Immediate Next Steps

1) Enrollment complete
2) Welcome/onboarding call scheduled
3) First checklist assigned in dashboard
4) Follow-up appointment booked

Retention protection: Confirm the client understands what the program is and is not.

Clear expectations reduce refunds and chargebacks.

Module B

Bulletproof Biz Credit & Asset Protection System™

Premium Implementation Program for Established Owners (3+ years)

QUALIFICATION

Who This Is For (And Why They Buy)

Established owners want structural clarity, risk separation, and funding readiness.

Ideal Client

- In operation 3+ years with real revenue
- Still relying heavily on personal credit
- Current structure feels "year one"
- Wants asset protection, credit, and tax alignment

Pain Drivers

- Personal exposure if something goes wrong
- Missed funding opportunities
- Disconnected advice from providers
- No coherent legacy/continuity plan

Positioning sentence:

"This is a coordinated structural upgrade: asset protection + business credit + tax positioning — built for serious operators."

DELIVERABLES

Offer Stack (Executive Summary)

Sell the integration — not isolated components.

A) Asset Protection Map (First 30 Days)

- Holding company framework
- Trust alignment framework
- Ownership/assignment mapping
- Operating agreement guidance
- Visual structure diagram

B) Business Credit System (Powered by GBC)

- Dashboard + app + roadmap
- Phased credit building path
- Reporting vendor guidance
- Workshops + accountability

C) Tax Strategy Session

- Entity optimization questions
- S Corp vs LLC context
- Audit-risk reduction concepts
- End-of-year readiness

(Not legal/tax advice)

Optional Upgrade: VIP "Done For You" Business Credit support (enhanced implementation).

PRICING

Investment & Responsible Urgency

Use executive framing: risk reduction, readiness, and long-term structural ROI.

Core System: $7,500 (one-time)

Optional VIP "Done For You" Upgrade: +$7,500 (one-time) • Combined Total: $15,000

Value Justification (Safe)

- A single lawsuit or structural error can exceed this investment.
- Fragmented advice often costs more without a unified roadmap.
- Being prepared before you need capital is cheaper than scrambling later.

Urgency (Responsible)

- Limited onboarding capacity to preserve quality
- Structural weaknesses amplify as revenue grows
- Economic and lending conditions shift

DISCLAIMERS

Disclaimers (Use As Written)

Protect the client and the enterprise — do not improvise.

Required Language

- “This program provides education, strategic guidance, and administrative support. It does not constitute legal, tax, or financial advice.”
- “Clients should consult licensed attorneys and CPAs for advice specific to their situation.”
- “We do not guarantee funding amounts, approvals, credit limits, tax outcomes, or legal results.”

Escalate When

A client asks for state-specific legal/tax advice, guaranteed outcomes, or requests contract language changes.

MANAGEMENT

Drive, Don’t Just Motivate

Motivation is temporary. Drivers create results with clarity, honesty, and accountability.

Moral Authority

- Lead by example (calls, standards, professionalism)
- Be direct and honest about skill gaps
- Coach scripts, tone, and work ethic
- Earn permission to lead through competence

Know Their Driver

- Survival → Status → Freedom → Purpose
- Competition and record-breaking
- Cause and mission
- “Enemy” (something to defeat)

Tie the “why” to a result and a deadline — then break it into daily behaviors.

30-60-90

30–60–90 Day Ramp (New Rep)

Short cycles; rapid feedback; live practice.

Days 1–30

- Systems setup complete
- Shadow calls daily
- Script mastery (open + discovery)
- Daily follow-up habit installed
- 2 role-plays/day + call review

Days 31–60

- Own calls with supervision
- Objection reps and closes
- Weekly coaching and scorecard
- Build pipeline; track conversion
- Referrals asked on every win

Days 61–90

- Independent performance
- Advanced fits: Bulletproof qualification
- Consistent close cadence
- Mentor newer reps (optional)
- Monthly goals + contests

EXECUTION

Implement This Week

Training only matters when it changes daily behavior.

- Stand up the daily leader bulletin (behaviors + results).
- Create the “best-of calls” library and schedule weekly call reviews.
- Launch the follow-up cadence: every lead scheduled in CRM with next step.
- Run daily script drills + role-plays; require mastery before autonomy.
- Use the provided tracker to monitor activity, conversion, and coaching notes.

Standard: “If it is not tracked, it will not improve.”