Closing The Deal Guide

Easy To Follow Scripts And
Guide To Closing A Deal

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Introduction

Closing the deal doesn't have to be complicated. By the time a prospect contacts you, they've already seen the demo Sales & Support Agent and know the value.

Your job now is simple: **confirm their interest, answer a few questions, and guide them into a free 30-day trial.**

This guide gives you a clear, step-by-step process to do exactly that. You'll learn:

- The simple 7-step flow to close a new client.
- Word-for-word scripts for phone, email, and SMS conversations.
- How to handle common objections without losing the sale.
- What to cover in the 30-minute onboarding call.
- Why the 14-day check-in is critical for long-term success.

Keep it simple, follow the steps, and you'll confidently turn prospects into clients ready to trial your Sales & Support Chatbot.

This is the big-picture flow. Once you're comfortable with this, you'll be ready to use the detailed scripts in the next section.

Part 1: High-Level Close Process

Every close follows the same simple flow. No matter if the prospect contacts you by phone, email, or SMS, your job is to guide them toward the **30-minute onboarding call**.

Here's the **7-Step Close Flow**:

Step 1: Acknowledge Interest

Thank them for reaching out. Confirm they've seen the demo and understand the free 30-day trial.

Step 2: Answer Questions

Handle any quick questions or blockers. Keep answers simple and confident.

Step 3: Redirect to a Call

If the contact is by email or SMS, answer briefly and move the conversation toward booking a phone call.

Step 4: Book the Call

Confirm a 30-minute onboarding call (today or tomorrow if possible).

Step 5: Onboarding Call

Use the call to collect their business and website details so you can configure the chatbot.

Step 6: Set the Timeline

Explain:

- 7 days for setup
- 30 days for the free trial
- 14-day check-in booked in advance

Step 7: Follow Up

Send a confirmation (email or SMS) and note the check-in in your calendar.

As you become more proficient at configuring the Sales & Support Assistant you may be able to reduce the 7 day setup. But initially give yourself plenty of time to ensure the upfront work is correct.

Use these scripts as your default responses. Keep it short, answer what you need to, but always steer toward booking the call.

Part 2: Detailed Close Instructions

By this stage, the prospect has already seen the demo Sales & Support Agent. They’re interested and reaching out to ask about the free trial. Your job is simply to guide them to the **30-minute onboarding call**.

Here are the scripts you can use in different situations:

Phone Closing Script

Prospect has called asking how to get the free trial.

You:
“Thanks for calling! Yes, the Sales & Support Chatbot is available on a 30-day free trial so you can see it working in your business. All we need is a quick 30-minute setup call to collect your details and get it installed. Do you have time today or tomorrow?”

- If they have questions, answer them briefly (see Part 3 for common objections).
- Always bring the conversation back to scheduling the call.

Email Closing Script

Subject: Your Free 30-Day Chatbot Trial

Hi [First Name],

Thanks for reaching out about the Sales & Support Chatbot. Yes — you can start a free 30-day trial today. To get it set up properly, I'd like to schedule a quick 30-minute call with you. On the call I'll collect the website and business details we need, then we'll configure your chatbot for you.

Do you have time today or tomorrow?

Best,
[Your Name]

SMS Closing Script

Prospect texts: "How do I get the free trial?"

"Hi [Name], Yes, the free trial is available. To set it up, we just need a quick 30-minute call. What works best for you, today or tomorrow?"

(If they ask questions in text, answer briefly but then send the above text to redirect to the call.)

Keep your answers short, confident, and positive. Always redirect back to: "Let's book a quick 30-minute call so we can get everything set up for your free trial."

Part 3: Handling Sales Blockers

Even though prospects are already interested, they may raise small objections or have concerns before committing to the trial. Here are the most common ones, with simple responses you can use.

"Do I need to pay anything upfront?"

"No — the trial is completely free. If you choose to continue after 30 days, we'll explain your options then."

"What if I don't like it?"

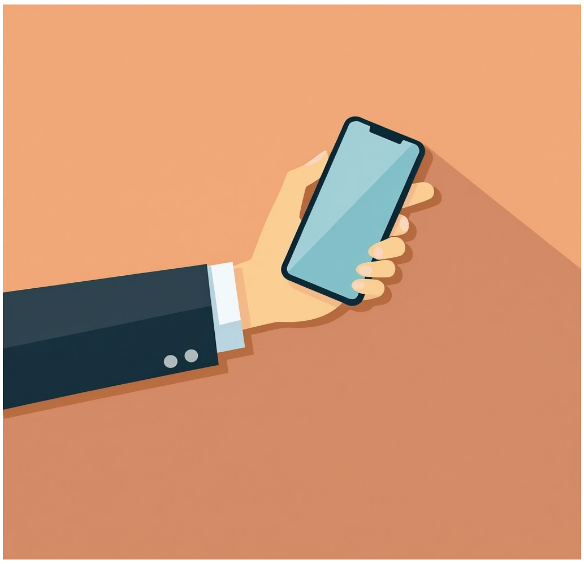
"No problem. You can cancel anytime during the trial, and we'll simply turn it off."

“Is it complicated to set up?”

“Not at all. We do the setup for you. All we need are a few details about your business and website.”

“Will it work for my type of business?”

“Yes. The chatbot is designed to handle sales and support conversations for local businesses. During setup, we customize it with your offers, pricing, and contact details so it speaks directly to your customers.”



Keep the call on track. Collect the essentials, set expectations, and finish by confirming the trial start date.

Part 4: Onboarding Call

The **30-minute onboarding call** is where you collect everything needed to set up the Sales & Support Chatbot. Keep it simple, structured, and clear — by the end of the call, the client should know exactly what happens next.

The 30-Minute Checklist

During the call, collect the following:

- **Website name & access**
  - WordPress login details, or confirm they can add a code snippet.
- **Web tech contact**
  - If they have a web developer or IT person, get their contact info.

- **Primary offer to promote**
  - e.g. “50% off window installs this month only.”
- **Sales URL or contact form**
  - The link where leads should be sent.
- **Contact numbers**
  - Sales, support, or special promotion lines.
- **Product/service catalogue**
  - A list of services and prices (basic version is fine).
- **Important page links**
  - Pages that describe products or services you’ll connect the chatbot to.
- **Current customer contact volume**
  - Roughly how many calls or emails they get per day, so you have a baseline.

How to Explain the Process

Once you’ve gathered the details, explain the timeline clearly:

- **Setup (7 days):** “We’ll take up to 7 days to configure your chatbot, upload your business details, and test everything.”
- **Free Trial (30 days):** “Once it’s live, your free 30-day trial begins immediately.”
- **Check-in (14 days):** “We’ll book a short check-in halfway through to see how it’s performing and make any tweaks.”
- **End of Trial:** “At the end of the 30 days, you can decide to continue, continue with support, or simply stop.”

Keep the check-in short (10–15 minutes). The goal is to remind them of the value, not overwhelm them.

Part 5: The 14-Day Check-In

The 14-day check-in is a key part of closing long-term deals. It shows professionalism, proves the value of the chatbot early, and keeps the client engaged before the trial ends.

Why It Matters

- Confirms the chatbot is live and working properly.
- Builds trust by showing you're proactive, not just "selling and disappearing."
- Reinforces the value of the free trial before the 30 days are up.

What to Cover in the Check-In

- **Performance so far**: "How has the chatbot been working for you?"

- **Leads captured**: Review any contacts or enquiries generated.
- **Customer feedback**: Ask if their customers have commented on the chatbot.
- **Adjustments needed**: Small tweaks (like updating an offer or FAQ) can be noted here.
- **Next steps**: Remind them the trial continues for another 16 days.

Reinforcing the Value

End the check-in by confirming results and setting expectations:

“Great, that’s exactly what we want to see at this stage. We’ll let the chatbot keep running, and then at the end of the trial we’ll review everything together. At that point, you’ll decide whether to continue as-is, continue with support, or stop.”

Conclusion

Closing the deal is not about pressure, it's about keeping the process simple and clear.

By the time a prospect contacts you, they've already been warmed up by the demo Sales & Support Agent. They know what it can do.

Your job is just to guide them smoothly into the free 30-day trial.

Remember the flow:

- Acknowledge their interest.
- Answer quick questions.
- Redirect to a 30-minute onboarding call.
- Collect the details you need.
- Set expectations (7-day setup → 30-day trial → 14-day check-in).

From there, the chatbot does most of the work. It pre-sells their primary offer, guides visitors to the purchase pages or sales teams, answers questions, and proves its value every day.

Your role is to keep things moving, stay professional, and check in at the right time.

At the end of the 30-day trial, your client will already have seen results. That makes the next decision easy:

- Stop and turn off the chatbot.
- Continue as-is with a one-off purchase.
- Continue with ongoing updates and support on a monthly plan.

Stay consistent, follow the steps, and you'll close deals with confidence. One smooth conversation at a time, you'll build trust, win clients, and grow your AI Services Agency.