

Sales Copywriting & Proposals — Workbook

This workbook is your hands-on companion to the Sales Copywriting & Proposals course. Each section mirrors a course module and gives you exercises, worksheets, and checklists to apply the frameworks to your real business. Work through it with an actual proposal or email you need to write — the results compound fastest when you practice on live material.

The Psychology of Buying Decisions

Map your buyer's internal decision process and identify the pain, gain, and trust signals that will drive your copy.

Exercise: Three-Layer Pain Stack Mapping

Choose one prospect or deal type you commonly pursue. Work through the three-layer pain stack for that buyer. Write in your own words — use the language your buyers actually use in discovery calls or emails.

- What is the surface complaint this buyer describes? Write it in one sentence using their vocabulary, not yours.

- What is the quantified business impact of that complaint? Estimate the annual cost in dollars, hours, or percentage of revenue if you cannot measure it precisely.

- What is the personal stake for the individual decision-maker — what happens to them specifically if this problem is not solved by year-end?

- What is the realistic cost of inaction for this buyer over 12 months? Show the calculation.

Worksheet: Buyer Credibility Signal Inventory

List every piece of social proof you currently have available, then rank each by the credibility hierarchy from the course (named case study = 5, direct client quote = 4, logo = 3, platform rating = 2, your own credentials = 1). Identify the gaps.

Proof asset description

Type (case study / quote / logo / rating / credential)

Industry match to typical prospect (yes / partial / no)

Credibility rank (1–5)

Metric used in this proof

Gap or action needed

Checklist: Buyer Psychology Readiness Check

- I can state my buyer's surface complaint in one sentence using their own language
- I have quantified the annual cost of my buyer's problem using their numbers or a reasonable estimate
- I have identified the personal stake for at least one common decision-maker role I sell to
- I have at least one piece of named, industry-specific social proof (case study or direct quote)
- I know which credibility signals I am missing and have a plan to fill the gap
- I have written out the prospect's internal monologue — the four questions they ask while reading any sales document from me

Copywriting Frameworks for Sales

Practice applying PAS, BAB, AIDA, and FAB to real copy before using them in a live proposal or email campaign.

Exercise: Framework Rapid-Application Drill

Take one offer you sell regularly. Write the same core message using three different frameworks back to back. Time yourself: aim for 10 minutes per framework. Compare the results and note which feels most natural and which is most persuasive.

- Write the PAS version (3–4 sentences): name the problem, agitate it with a consequence or statistic, then name your solution with a specific outcome.

- Write the BAB version (3–4 sentences): describe the current before-state, paint the after-state in concrete terms, then bridge with your offer and a timeframe.

- Write the AIDA version as a cold email (subject line + 4 short sentences, one per element). Include a quantified outcome in the Desire sentence and a single-question ask in the Action sentence.

- After writing all three, circle the strongest sentence from each and combine them into one hybrid paragraph. Note which elements you borrowed from which framework.

Worksheet: FAB Translation Table

List the 5–8 most important features of your core offer. For each, complete the FAB translation using the So What? drill from the course. This table becomes a reusable asset for any proposal or sales email.

Feature (what it is or does)

Advantage (why it is better than the alternative)

Benefit for executive buyer (financial / strategic outcome)

Benefit for operational buyer (workflow / process outcome)

Benefit for technical buyer (integration / implementation outcome)

One-sentence FAB statement combining all three

Checklist: Cold Email Quality Gate

- Subject line is personalized — contains the prospect's name, company name, or a reference to their specific situation
- Opening line demonstrates research — references something specific about their company, industry, or a recent event

- [] One quantified outcome is stated in the body — a number, percentage, or dollar figure
- [] Total word count is between 75 and 125 words
- [] There is one ask only — a reply, a calendar link, or a yes/no question
- [] No attachments on the first email — friction is eliminated
- [] A three-email follow-up sequence is scheduled before sending the first email

Writing the Winning Proposal

Build or rebuild one complete proposal using the five-section structure, with particular focus on the investment section and pre-emptive objection handling.

Exercise: Executive Summary First Draft

Write the executive summary for a current or recent proposal using the four-part structure: problem statement, cost of current state, proposed solution and outcome, next step. Keep it under 300 words. Then read it aloud and ask: would a busy executive understand the full case without reading another page?

- Write the problem statement in two sentences using the buyer's language. Reference a specific number (cost, time, rate) if you have one from discovery.

- Write one sentence on the cost of the current state. Use the calculation from your Three-Layer Pain Stack worksheet.

- Write two sentences describing the proposed solution and the primary outcome. Name the outcome specifically — not 'improved performance' but 'close rate from 18% to 26% within 60 days'.

- Write one sentence for the next step: what happens, who does it, and by when.

Worksheet: Investment and ROI Section Builder

Complete this worksheet for one proposal tier (your recommended middle option). Use the buyer's own numbers wherever you have them from discovery. Leave calculated cells blank — you will fill the totals in your actual proposal.

Current state metric (e.g., close rate, revenue, churn rate — use buyer's number)

Conservative improvement estimate (% — use 10–20% unless you have proof of higher)

Annual value of improvement (buyer's metric × improvement estimate)

Your proposed investment for this tier

Payback period in months (leave blank — calculate in proposal)

First-year ROI ratio (leave blank — calculate in proposal)

One risk-reversal element included in this tier

Payment structure (single / milestone / monthly)

Checklist: Objection Pre-emption Audit

- Price objection addressed: the cost of inaction is quantified before the price is revealed
- Price objection addressed: a three-option structure is used so the buyer chooses which, not whether
- In-house objection addressed: the honest cost of the in-house alternative (hiring, time to competency) is acknowledged and quantified
- Timing objection addressed: cost of delay is calculated and stated (e.g., monthly value of the problem)
- Timing objection addressed: a risk-reversal element (pilot, phased payment, satisfaction clause) is offered
- All three objections are addressed naturally in the proposal flow — not in a defensive FAQ section
- Language is confident without being dismissive of the objection

Pitch Decks, Auditing, and Iteration

Apply the audit checklist to an existing document, convert one proposal section into pitch deck slides, and set up your 90-day tracking system.

Exercise: Live Audit of an Existing Proposal or Email

Take the most recent proposal or sales email you sent. Run it through the 12-point audit from the course. Score each point as pass, partial, or fail. Calculate your audit score (pass = 1, partial = 0.5, fail = 0). Identify the three lowest-scoring points and rewrite those sections.

- What is your current audit score out of 12? List the three points where you scored zero.

- Rewrite the opening paragraph of your proposal so it scores a full pass on audit point 1 (prospect's problem in their language).

- Rewrite or add the call-to-action section so it scores a full pass on audit point 10 (single, clear next step with a specific date or deadline).

- After rewriting, re-score those three points. What is your new total score? What would it take to reach 10 out of 12?

Worksheet: Pitch Deck Slide Assertion Rewrite

Take 5 slides from an existing pitch deck or proposal section and rewrite each topic headline as an assertion headline using the Assertion-Evidence model. Then write the one-sentence implication for the buyer that closes each slide.

Slide number

Original topic headline

Rewritten assertion headline (makes a specific claim)

One piece of evidence supporting the claim

One-sentence buyer implication (what this means for them)

Checklist: 90-Day Iteration System Setup

- A proposal tracking spreadsheet is set up with at minimum: date sent, prospect name, framework used, deal value, outcome
- Email reply rate is being tracked separately from proposal close rate
- A baseline close rate for the last 90 days is calculated and documented
- One variable to test this month is identified and documented (e.g., adding a three-option pricing structure)
- The test variable will not be changed mid-month — one variable, one period

- [] A review date is scheduled 30 days out to assess results and choose the next test variable
- [] Win/loss notes are logged for every proposal outcome — at least one sentence on why it won or lost

Your Action Plan

1. Complete the Three-Layer Pain Stack worksheet for your most common buyer type before writing any new proposal
2. Build your FAB Translation Table for your core offer and save it as a reusable reference document
3. Rewrite your current proposal template using the five-section buyer-centric structure from Module 3
4. Add a cost-of-inaction calculation to the investment section of your next proposal using the buyer's own numbers
5. Run the 12-point audit on every proposal before sending for the next 30 days
6. Set up a three-option pricing structure in your proposal template and use it on the next three proposals
7. Write a three-email follow-up sequence for your most common prospect type and schedule it in your outreach tool
8. Create a proposal tracking spreadsheet and log every proposal sent for the next 90 days
9. Identify one test variable for this month and document it before changing anything in your proposal template
10. Schedule a 60-minute monthly review to analyze your close rate data and choose the next iteration

