

Closer's Pre-Pitch Checklist

"If you don't know this, don't pitch yet."

1. The Problem

- What specific challenge/problem is the prospect facing?
- How long have they been dealing with it?
- What have they already tried to fix it?
- Why didn't those solutions work?

Why? :-

You need to know what's broken before you offer a fix.

If you don't understand their problem, your pitch will sound random — or worse, irrelevant.

2. Pain Level

- How is this problem affecting them personally or emotionally?
- How is it affecting their business/lifestyle?
- What's at risk if nothing changes?

Why?:-

People don't buy just because they have a problem — they buy because that problem hurts.

If it doesn't hurt enough, they'll delay.

No pain = no urgency.

3. Current Situation

- Where are they at right now in terms of performance/results?
- Who else is involved in the decision?
- What stage of decision-making are they in?

Why? :-

This tells you where they're starting from.

If you don't know where they are, you can't lead them anywhere. You'll be guessing.

4. Desired Outcome

- What result are they hoping to achieve?
- Why is that result important to them?
- What's their time frame to hit that goal?

Why? :-

You're not selling a product — you're selling a result.

If you don't know what they want, you can't show them how your offer gets them there.

5. Budget & Resources

- Do they have a budget or have they invested in something like this before?
- Have they spoken to others or seen alternative offers?
- What happens financially if they don't move forward?

Why?:-

Even if they love your offer, they can't say yes if they can't afford it.

This helps you avoid wasting time pitching something they can't commit to.

6. Potential Roadblocks

- What's their biggest hesitation or fear?
- Who or what could slow this decision down?
- Have they tried solving this before and failed?

Why?:-

There's always something that could slow down or kill the deal.

If you don't find it early, it will surprise you later — and cost you the close.

7. Emotional Cues

- What language, tone, or keywords did they use when describing the problem?
- Where did they light up or get frustrated?
- What do they value more: speed, trust, certainty, autonomy, status, etc.?

Why? :-

Logic gets attention, but emotion drives action.

If you don't pick up what they really care about, they won't feel understood — and they won't trust you enough to buy.

Final Check

- Do I fully understand what they want, why they want it, and what's stopping them?
- Have I earned the right to prescribe a solution?
- Can I tailor my pitch to reflect their exact language and priorities?

"If you wouldn't let a doctor operate without a diagnosis, don't pitch without doing discovery."

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