# next8n

# SOP: CLOSER

Workflow Automation Delivery Framework

**ENTERPRISE EDITION**

**Version:** 2.0

**Date:** December 28, 2025

**Author:** Mirza Iqbal

**Contact:** mirza.iqbal@next8n.com

# Table of Contents

# SOP: Closer

## Standard Operating Procedure for Proposals, Negotiations & Contracts

## Role Overview

**Title:** Closer / Senior Sales / Solutions Consultant
**Reports To:** Sales Manager / Agency Owner
**Receives From:** Sales Representative
**Hands Off To:** Project Manager

**Primary Objective:**
Convert qualified prospects into paying clients through proposals, negotiations, and contract signing.

## Daily Workflow

### Morning Routine (30 min)

```
Review new handoffs from Sales Reps
Check pending proposals for responses
Prepare for proposal calls
Review negotiation strategies
Update pipeline forecast
```

## Core Activities

```
1. PROPOSAL PREPARATION (2-3 hours)
     Review discovery notes
     Design solution approach
     Build scope of work
     Calculate pricing
     Prepare proposal document

2. PROPOSAL CALLS (2-3 hours)
     Present solutions
     Handle objections
     Answer questions
     Discuss pricing

3. NEGOTIATION & CLOSE (1-2 hours)
     Follow up on proposals
     Negotiate terms
     Prepare contracts
     Collect signatures and deposits

4. HANDOFF (30 min)
     Transition to delivery team
     Schedule kickoff
     Document everything
```

# Receiving Handoff from Sales Rep

## Review Checklist

```
BEFORE SCHEDULING PROPOSAL CALL:

 Discovery notes reviewed
 Pain points understood
 Budget signals assessed
 Decision makers identified
 Timeline requirements clear
 Competitive situation known
 Questions prepared

IF MISSING INFORMATION:
 Ask Sales Rep for clarification
 Or schedule brief follow-up with prospect
```

## Initial Outreach to Prospect

```
EMAIL TEMPLATE:

Subject: Next Steps - [Company] x [Your Company]

Hi [Name],

[Sales Rep] filled me in on your conversation, and I'm
excited to discuss how we can help with [their pain point].

I've put together some initial thoughts on an approach
that could [key benefit]. I'd love to walk you through it.

Do you have 30-45 minutes this week?
Here's my calendar: [Link]

If others should join, feel free to forward this along.

Looking forward to it!

[Your Name]
[Title]
```

# Proposal Development

## Solution Design Process

```
STEP 1: UNDERSTAND THE NEED
————————————————————————————

- Review all discovery notes
- Identify primary pain points
- Understand success criteria
- Note any constraints

STEP 2: DESIGN THE SOLUTION
————————————————————————————

- What workflows are needed?
- What integrations required?
- What AI components involved?
- What's the complexity level?

STEP 3: ESTIMATE EFFORT
————————————————————————————

- Hours for each component
- Risk factors
- Dependencies
- Timeline considerations

STEP 4: CALCULATE PRICING
————————————————————————————

- Base cost (hours × rate)
- Complexity multiplier
- Value-based adjustment
- Market positioning
```

# Pricing Framework

```
PRICING TIERS:

SIMPLE WORKFLOW
- 1-2 integrations
- Basic logic
- Standard templates
- Price range: $X - $X

STANDARD PROJECT
- 3-5 integrations
- Custom logic
- Some AI components
- Price range: $X - $X

COMPLEX PROJECT
- 5+ integrations
- Advanced logic
- Significant AI
- Price range: $X - $X

ENTERPRISE
- Multiple workflows
- Full systems
- Custom development
- Price range: $X+

_____


PRICING ADJUSTMENTS:
+ Rush timeline: +25-50%
+ Complex integrations: +20%
+ Enterprise client: +30%
- Long-term relationship: -10%
- Case study permission: -5%
```

# Proposal Document Template

```
# [Project Name] Proposal
## Prepared for [Company Name]
### [Date]

---

## Executive Summary
[2-3 paragraphs summarizing the opportunity and solution]

## Understanding Your Needs
### Current Situation
[What they're dealing with now]

### Challenges
1. [Challenge 1]
2. [Challenge 2]
3. [Challenge 3]

### Goals
[What success looks like]

## Proposed Solution

### Overview
[High-level solution description]

### Deliverables

#### Workflow 1: [Name]
- Trigger: [How it starts]
- Process: [What it does]
- Output: [What happens]
- Integrations: [What connects]

#### Workflow 2: [Name]
[Same structure]

### What's Included
- [Item 1]
- [Item 2]
- [Item 3]
- Documentation
- Training
- X days post-launch support

### What's Not Included
- [Exclusion 1]
- [Exclusion 2]
- Future enhancements (quoted separately)

## Timeline
```

```
| Phase | Activities | Duration |
|-------|-----------|----------|
| Setup | Environment, credentials | Week 1 |
| Development | Build workflows | Weeks 2-3 |
| Testing | QA and refinement | Week 4 |
| Delivery | Handover and go-live | Week 4 |

## Investment

### Project Fee
**Total: $X,XXX**

### Payment Schedule
- 50% deposit to begin: $X,XXX
- 50% upon completion: $X,XXX

### Optional: Maintenance Retainer
$X/month includes:
- Monitoring
- Bug fixes
- Minor updates
- Monthly check-in

## Next Steps
1. Review and approve proposal
2. Sign agreement and submit deposit
3. Schedule kickoff call
4. Begin project

## About [Your Company]
[Brief company background and credentials]

## Contact
[Your contact information]
```

# Proposal Call Procedure

## Call Preparation

```
BEFORE THE CALL:

 Proposal document ready
 Screen share tested
 Pricing options prepared
 Objection responses ready
 Contract ready to send
 Calendar open for kickoff scheduling
```

## Proposal Call Framework (45 min)

```
0:00 - OPENING (5 min)
─────────────────────
"Thanks for making time today!"
"Quick recap of what I understand you need..."
[Confirm understanding]
"Any changes since we last talked?"

0:05 - SOLUTION PRESENTATION (15 min)
─────────────────────────────────────
"Here's what I'm proposing..."
[Walk through each deliverable]
[Explain how it solves their pain]
[Show relevant examples/demos if applicable]

0:20 - PRICING & TIMELINE (10 min)
──────────────────────────────────
"The investment for this is..."
[Present pricing clearly]
[Explain payment terms]
[Walk through timeline]

0:30 - QUESTIONS & OBJECTIONS (10 min)
──────────────────────────────────────
"What questions do you have?"
[Handle objections - see below]
[Address concerns]

0:40 - CLOSE (5 min)
────────────────────
"Based on our conversation, are you ready to move forward?"
[If yes: Send contract, schedule kickoff]
[If no: Understand concerns, set follow-up]
```

## Common Objections & Responses

```
OBJECTION: "The price is too high"
RESPONSE:
"I understand budget is a consideration. Let me ask -
what were you expecting to invest? And what would happen
if you don't solve this problem? [Pause] Often when we
break down the ROI, clients find the investment pays for
itself in [X months]. Would it help to look at the numbers?"

Alternative: "We could adjust scope to fit your budget.
What's most critical to solve right now?"

_____

OBJECTION: "I need to think about it"
RESPONSE:
"Of course. What specifically do you want to think through?
Is it the solution approach, the pricing, or something else?
[Address specific concern] When do you think you'll have
a decision? I'll follow up then."

_____

OBJECTION: "I need to discuss with my team"
RESPONSE:
"Absolutely. Who else is involved in this decision?
Would it be helpful if I joined a call to answer their
questions directly? Or I can prepare materials for you
to share. What would work best?"

_____

OBJECTION: "What about [Competitor]?"
RESPONSE:
"They do good work. The key difference is [differentiator].
Our clients typically choose us because [reason].
What's most important to you in making this decision?"

_____

OBJECTION: "Can you do it faster?"
RESPONSE:
"I want to deliver quality work. Rushing often leads to
issues. However, if timeline is critical, we can discuss
rush options - there would be a premium for the accelerated
schedule. What's driving the timeline?"
```

# Closing Process

## Asking for the Close

```
TRIAL CLOSE:
"Based on what we've discussed, does this feel like
the right solution for you?"

DIRECT CLOSE:
"Are you ready to move forward?"

ASSUMPTIVE CLOSE:
"Great! I'll send over the agreement now.
When would you like to schedule the kickoff?"

ALTERNATIVE CLOSE:
"Would you prefer to start with Option A or Option B?"

URGENCY CLOSE (use sparingly):
"Our calendar fills up quickly. If you sign this week,
we can start [date]. Would that work?"
```

## Contract Process

```
STEP 1: SEND AGREEMENT
————————————————————

Use standard contract template
Customize scope section from proposal
Include payment terms
Set signing deadline (3-5 days)

STEP 2: TRACK STATUS
————————————————————

Follow up if not signed:
- Day 2: "Did you have any questions about the agreement?"
- Day 4: "Checking in - want to confirm you received this"
- Day 7: "Is there anything holding you back?"

STEP 3: COLLECT SIGNATURE
—————————————————————————

Use e-signature tool (DocuSign, PandaDoc, etc.)
Confirm signed by authorized person
Download executed copy for records

STEP 4: COLLECT DEPOSIT
———————————————————————

Send invoice immediately after signing
Provide payment options
Confirm payment received
Receipt sent
```

# Handoff to Delivery

## Handoff Checklist

```
BEFORE HANDING TO PROJECT MANAGER:

 Contract fully signed
 Deposit received and confirmed
 Kickoff date scheduled
 All requirements documented
 Client expectations clear
 Special requests noted
 Contact information verified
 CRM updated to "Won"
```

## Handoff Package

```
HANDOFF TO PROJECT MANAGER:

Subject: New Project - [Client Name]

Hi [PM Name],

We have a new project! Details below.

CLIENT INFO:
- Company: [Name]
- Main Contact: [Name, Title, Email, Phone]
- Other Contacts: [If any]

PROJECT OVERVIEW:
[Summary of what was sold]

SCOPE OF WORK:
[Link to proposal/SOW]

CONTRACT:
[Link to signed contract]

PAYMENT:
- Total: $X
- Deposit received: $X on [date]
- Final due: [terms]

TIMELINE:
- Kickoff: [Scheduled date]
- Target completion: [Date]

KEY REQUIREMENTS:
1. [Requirement 1]
2. [Requirement 2]
3. [Requirement 3]

SPECIAL NOTES:
- [Any special requests]
- [Things to be careful about]
- [Client personality notes]

Let me know if you need anything else!

[Your Name]
```

## Introduce Client to Project Manager

```
INTRO EMAIL:

Subject: Meet [PM Name] - Your Project Team

Hi [Client Name],

We're excited to get started! I'm introducing you to
[PM Name], who will be your main point of contact
throughout the project.

[PM Name] leads our delivery team and will:
- Coordinate the kickoff call
- Manage the project timeline
- Ensure smooth communication
- Deliver your completed automation

[PM Name] - meet [Client Name] from [Company].
[One sentence about the project]

[Client Name], expect to hear from [PM Name] shortly
to confirm the kickoff call.

I'll check in periodically, but [PM Name] has you in
great hands!

Best,
[Your Name]
```

# Metrics & Reporting

## Key Metrics

```
WEEKLY TRACKING:

| Metric | Target | Actual |
|--------|--------|--------|
| Proposals sent | 5 | |
| Proposal calls | 5 | |
| Contracts sent | 3 | |
| Deals closed | 2 | |
| Revenue | $XX,XXX | |
| Close rate | 40% | |
| Avg deal size | $X,XXX | |
```

## Pipeline Management

```
PIPELINE REVIEW (Weekly):

PROPOSAL STAGE:
- [Company] - $X - [Next step]
- [Company] - $X - [Next step]

NEGOTIATION STAGE:
- [Company] - $X - [Status]
- [Company] - $X - [Status]

PROJECTED CLOSE THIS WEEK:
- [Company] - $X - [Confidence %]

AT RISK:
- [Company] - $X - [Why at risk]
```

# Best Practices

```
DO:
 Know the proposal inside and out
 Present value before price
 Listen to objections fully
 Follow up persistently (but not annoyingly)
 Create urgency when appropriate
 Be honest about limitations
 Protect scope in negotiations
 Celebrate wins with the team

DON'T:
 Discount without getting something back
 Promise things not in scope
 Badmouth competitors
 Rush the close
 Let deals go stale
 Over-promise on timeline
 Skip the handoff documentation
 Disappear after close
```

**Next**: See `04-sop-project-manager.md` for Project Manager procedures.

Workflow Automation Delivery Framework | next8n | https://next8n.com

This document is confidential and intended for authorized use only.