AGIFT

AMIT GLOBAL INNOVATIVE FUTURE TRENDS

PROFESSIONAL CLIENT ACQUISITION & REVENUE GENERATION KIT

A practical toolkit for enquiries, consultations, bookings, payments and client follow-up

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“Transforming Ideas into Opportunities”

01. AGIFT Service Portfolio

Use this menu to guide prospects toward the service that best matches their needs.

Positioning: AGIFT provides consulting, coaching, training and mentorship for individuals, professionals, entrepreneurs and organisations. Lead with the client's challenge and recommend only the service that fits.

SERVICE	PROFESSIONAL FEE
Introductory Webinar	■101
Health & Wellness Consultation	■2,100
Financial Portfolio Review	■2,100
Business Growth Consultation	■2,100
Astro Vastu Consultancy	■5,100
Direct Selling Business Guidance	■5,100
Sales Mastery Programme	■9,999
Career Growth Programme	■11,000
Life Coaching Programme	■11,000
Real Estate Opportunity Consultancy	■21,000

Service areas: Business growth and marketing • Corporate sales training • Leadership development • Career coaching • Financial education and portfolio review • Real estate consulting • Life coaching • Health and wellness guidance • Astro Vastu • Startup mentorship.

Pricing note: Fees are in INR. Confirm scope, duration, deliverables and any applicable taxes before accepting payment. For regulated financial, health or other specialist matters, stay within the relevant professional and regulatory permissions.

02. Client Registration & Enquiry Form

Complete one form for every qualified enquiry. Collect only information needed to respond and deliver the requested service.

Client name		**Date**	
Mobile number		**Email**	
City		**Profession / business**	
Service interested in		**Lead source**	
Preferred appointment date		**Preferred time**	
Current challenge / requirement			
Expected outcome			
Notes / follow-up date			

Lead source options: WhatsApp • Facebook / Instagram • LinkedIn • Referral • Webinar • Existing client • Other

Communication consent: I agree to be contacted by AGIFT about the service I have enquired about. I understand I can ask AGIFT to stop further promotional communication.

Client confirmation: _____

03. Business Consultation Assessment

Use during a paid business growth session. Capture the client's current position and agree on practical next steps.

Client / business: _____ **Date:** _____

Consultant: Dr. Amit Sharma

A. Discovery questions

1. What is your current business or professional activity?

_____

2. What are the three biggest challenges you are facing?

_____

3. How do you currently attract and convert customers?

_____

4. What are your current sales, revenue or career goals?

_____

5. What have you already tried, and what happened?

_____

6. What outcome would make this consultation valuable to you?

_____

B. Business growth assessment

ASSESSMENT AREA	RATING (1–5)	OBSERVATIONS
Marketing strategy		
Lead generation		
Sales conversion		
Customer retention		
Team productivity		
Financial planning		
Business development		

C. Agreed action plan

Priority 1: _____

Priority 2: _____

Priority 3: _____

30-day action plan: _____

Owner / responsibility: _____

Review date: _____

Important: Record recommendations clearly, distinguish facts from assumptions, and do not promise guaranteed business, investment, health or career outcomes.

04. Booking, Payment & Receipt Workflow

Use a consistent process so the client knows what they are buying and what happens next.

STEP	ACTION	CHECKPOINT
1. Understand	Clarify the client's need and desired outcome.	Service is suitable and within AGIFT's scope.
2. Explain	Share fee, duration, format and deliverables.	Client understands what is included and excluded.
3. Confirm	Agree appointment date, time and cancellation terms.	Written booking confirmation sent.
4. Collect	Share official payment details and verify receipt.	Funds are credited; retain transaction reference.
5. Deliver	Conduct the session and provide agreed materials.	Service delivery recorded.
6. Follow up	Ask for feedback and agree next step if needed.	No pressure or unsupported promises.

PAYMENT ACKNOWLEDGEMENT

Receipt number		**Date**	
Received from			
Service purchased			
Amount received		**Payment mode**	
Transaction reference			
Appointment / delivery date			

Authorized by: Dr. Amit Sharma, Founder & CEO – AGIFT

This acknowledgement is not a GST tax invoice. Issue a compliant tax invoice where legally applicable. State tax treatment clearly and do not collect tax unless appropriately registered and required to do so.

05. WhatsApp & Sales Conversation Scripts

Personalise each message. Contact people who have enquired or who would reasonably welcome the information.

A. Introduction

Hello! I am Dr. Amit Sharma, Founder of Amit Global Innovative Future Trends (AGIFT). We provide consulting, coaching, training and mentorship for individuals, professionals, entrepreneurs and business owners. Is there a particular business, career or personal-development goal you are currently working on?

B. Business Growth Consultation

Thank you for sharing your business requirement. AGIFT offers a structured Business Growth Consultation at ■2,100. The session focuses on understanding your current challenges and identifying practical next steps. The agreed deliverable is a concise action sheet. Would you like to review the session scope and available appointment times?

C. Career Growth Programme

Are you looking to strengthen your career direction, interview readiness, communication or professional skills? AGIFT's Career Growth Programme is ■11,000. Before enrolment, I would like to understand your goals and explain the programme structure, duration and deliverables so you can decide whether it is right for you.

D. Financial Portfolio Review

AGIFT offers an educational Financial Portfolio Review at ■2,100 to help clients organise information about their goals, allocation and risk exposure. This is not a promise of returns or a substitute for regulated investment advice. Would you like to know what documents and information are needed for the review?

E. Booking confirmation

Thank you for choosing AGIFT. Your requested service is: [service]. Agreed fee: ■[amount]. Appointment: [date and time]. Format: [online / in person]. Deliverables: [brief description]. Please confirm that these details are correct before payment and booking confirmation.

F. Follow-up

Hello [name], I am following up on your enquiry about [service]. Would you like me to clarify the scope, fee or appointment process? If now is not the right time, that is absolutely fine. Thank you for considering AGIFT.

G. Referral request

Thank you for working with AGIFT. If you found the service useful, you are welcome to share our details with someone who may benefit. We appreciate introductions, and there is no obligation.

06. Daily Sales & Revenue Tracker

Use this page at the end of each working day. Count collected revenue separately from enquiries and verbal commitments.

PERFORMANCE INDICATOR	TARGET	ACTUAL
New prospects contacted	30	
Meaningful conversations	10	
Qualified enquiries	5	
Consultation bookings	3–5	
Paying customers	2–3	
Revenue actually collected	■10,000	

Daily close-out

Date: _____

Total enquiries: _____

Meetings conducted: _____

Payments received: _____

Outstanding confirmed payments:

_____

New clients acquired: _____

Follow-ups due: _____

Key learning / next action:

_____

Client retention checklist

■ Send a thank-you message after the session.

■ Provide the agreed notes, recommendations or action sheet.

■ Ask for feedback without pressuring the client.

■ Schedule a follow-up only where useful and agreed.

■ Request a referral where the client is satisfied.

■ Record the next action and close the loop.

AGIFT operating principles

Professional integrity • Transparent pricing • Client confidentiality • Clear deliverables • Practical recommendations • Responsible claims.

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