

# PROPOSAL WRITING AND DELIVERY

Stooz

- Remember it is your proposal
- Send it to the right contact, only when you are ready
- Tell the customer that it will arrive when completed.

# PROPOSAL WRITING & DELIVERY

Stooz

- Most are sent far too early
  - Driven by low level contacts who say it's needed for a 'board meeting' or 'a decision will be made at that meeting'
  - Have you ever been successful sending it early? I have not!
- Only send the proposal when you have all the information you need, plus the time is right.
  - So many people send a proposal because the Prospect / Client asks for it, without understanding where the client is in its 'Buying Cycle'.
- Junior people ask for a proposal because :
  - They have been asked for it by someone from higher up
  - They want to be proactive to look good
  - They want to show the suppliers they are the decision maker, when in fact they are not
- Too many proposals are asked for and provided, too early in the sales cycle, sometimes even by email,
  - They sit doing nothing, until a final communication comes back saying 'the budget was cut'.

# PROPOSAL WRITING & DELIVERY

Stooz

What constitutes a good proposal?

Which ones do you read?

What does it tell the opportunity team?

How are they laid out?

Why are they good?

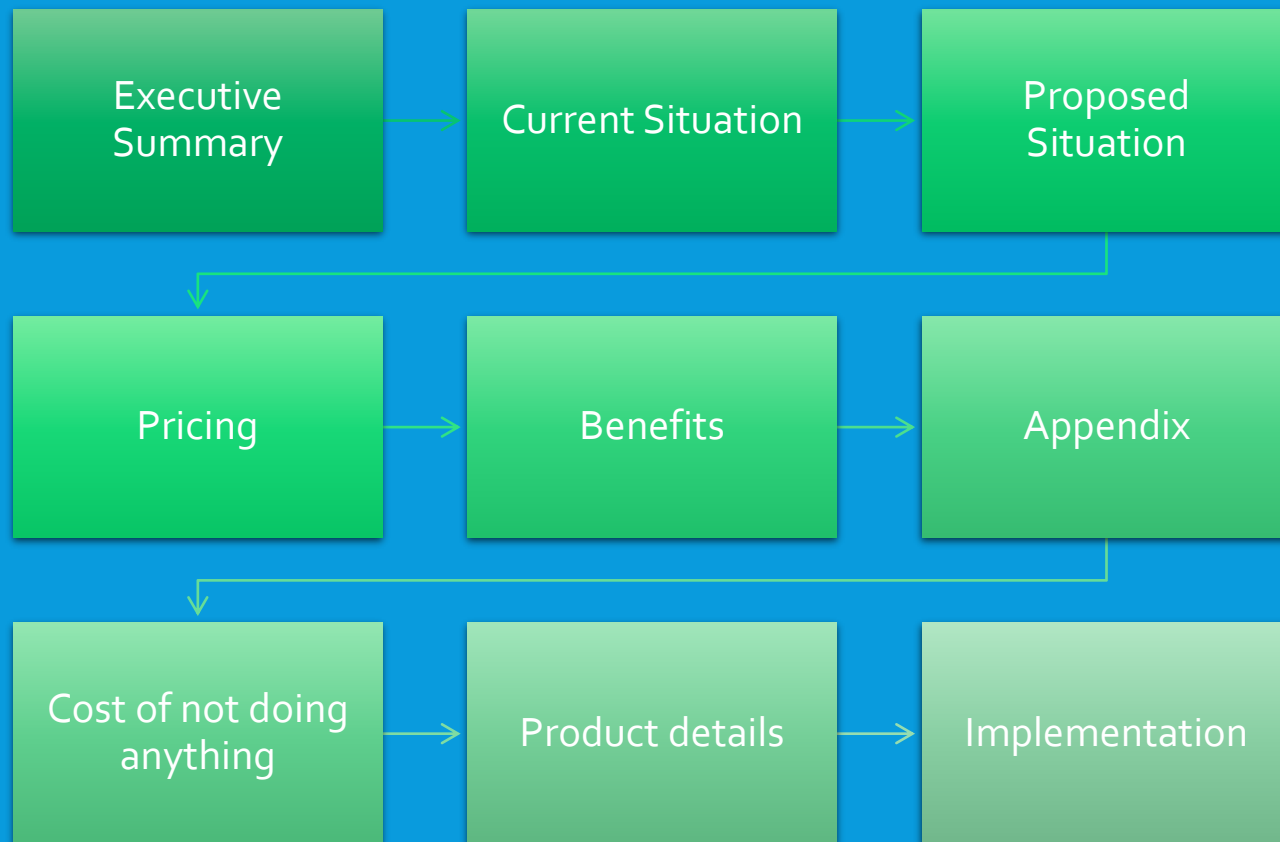
Where is the price?

Which ones do you approve?

Remember, the same thing happens every week at home!

# PROPOSAL WRITING & DELIVERY

Stooz



# PROPOSAL WRITING & DELIVERY

Stooz

- The proposal should be able to be understood, assessed and a decision made by people who know nothing about the product, solution or issues currently.
  - CEO's & CFO's are asked to assess and make decisions on so many things, yet they rarely have any knowledge of the issues at hand.
- How the proposal is received is up to you.
  - It also provides a great opportunity to network higher in a organisation
- Don't be too eager to provide one, since you may not currently know the timing.
- A good reply when asked for a proposal or indicative pricing is:
  - I don't currently have enough information to provide my proposal.
  - If IBM, Walmart or J P Morgan said this, no one would ask any questions, except what else do you need?

# PROPOSAL WRITING & DELIVERY

Stooz

Must be understood by anyone (even those who know nothing about the issues).

Have a standard template.

The process of approval must be clear, including those involved and the timing.

Who is involved in the decision

Understand the DM, BH, Users, Influencers, etc

What is most important to each?

All information has been triangulated

# PROPOSAL WRITING & DELIVERY

Stooz

- Your proposal – Template, a standard or bespoke one?
- Who makes the decision? % chance you have met them?
- Who is sponsoring your proposal?
- Their standing in the business?
- How much fight, how persuasive are they?
- What does the content of your proposal say?
- How detailed is it?
- Could someone who knows nothing about it, understand it?
  - Why they should buy it?
  - What it does for the company?
  - Can they afford it?
  - That your business is the best company to provide them with the solution?

# PROPOSAL WRITING & DELIVERY

Stooz

Finally, what happens next?

- After the proposal has been sent?
- The timing? – who controls this?
- What should you do?
- What will they do?
- What happens if there is a delay?

Rarely does a proposal not stimulate some questions.

- Who will ask them?
- Give you feedback?
- What do they want to see / know?