



# Quote, Propose, and Close:

*5 Steps to Building  
Winning Sales Proposals*

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# Introduction

## “We lost the deal? What happened?”

Sounds all too familiar. And what’s worse is that value added resellers and their sales professionals often don’t know that it is not about the money, but the proposal itself. This eBook details five steps for building winning sales proposals, forever changing your proposal success rate and your business.

## Where Do Proposals Go Wrong?

A proposal is a document that solidifies your relationship with your customer. The proposal should identify business problems and document the technology solutions you can offer. In short, a proposal is your way of showing your company’s value and detailing how you can make your customers’ lives better. **So how do you offer yourself as the best software provider and what key things can you provide as evidence?** Look to your work and your reputation as your proof points. Offer references from existing customers, key studies you’ve participated in, articles your company has published, memberships in professional organizations, and your experience as a guest speaker.



### What is a good proposal?

Good proposals are moneymakers.

They are:

- **Attractive, informative, accurate**
- **Delivered in a timely fashion**
- **A positive reflection of your company brand and image**
- **Competitive and impressive**
- **Delivered in a manner reflective of your technology**



### And a “bad” proposal?

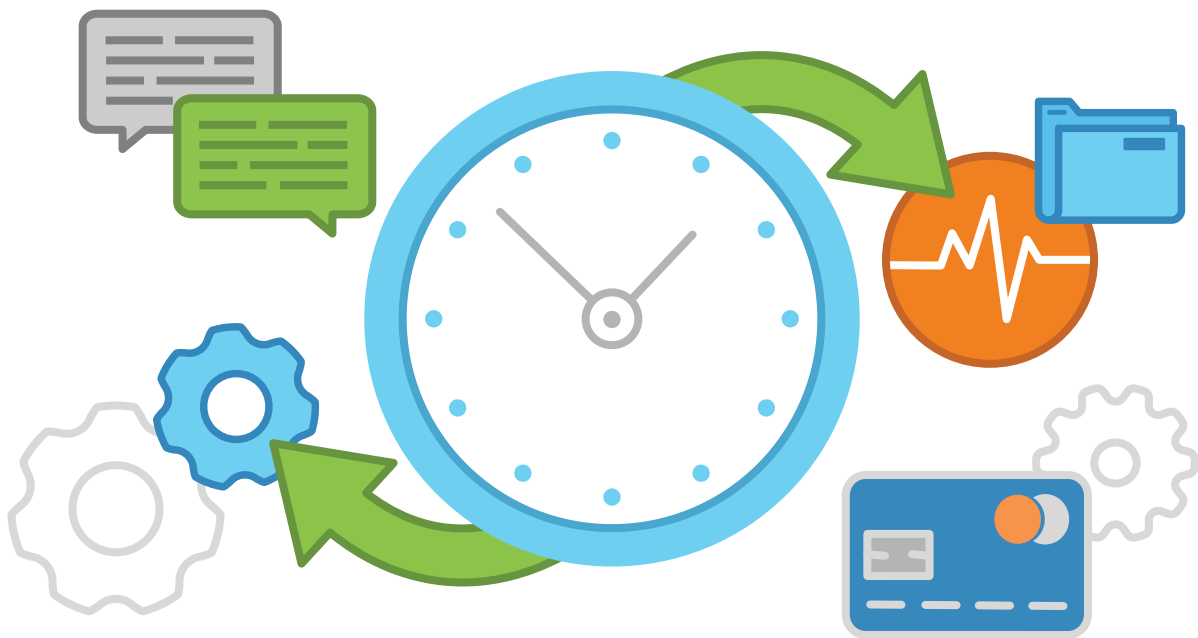
Bad proposals are simply pieces of paper that don’t reflect a relationship. They are:

- **Unattractive**
- **Delivered late**
- **Poorly branded—not reflective of who you are or the solution you offer**
- **Uncompetitive**
- **Error-ridden (typos and poor grammar)**

# 1: Keep It Timely

Always keep your commitment for delivery time frames; your vast experience will help you to establish standards and goals for what is timely. Track your proposal responses to ensure that you're meeting not only prospect deadlines, but also your own timeline's goals. Timeliness is the first commitment in your relationship and sets the stage for the future tone of your relationship.

**Remember, sales is a service and should be treated as one.** During this stage of the process, regardless of whether you're communicating with a current customer or a new prospect, you're indeed in a sales cycle. You should treat the quote as if you are servicing, or assisting, an existing customer. In short, your response is a reflection of your services. Your proposal response should be as quick and as efficient as if you were handling a customer call.



And what are your best weapons against a lack of timeliness?

**Two things: technology and an efficient process.** Using an automated quote and proposal tool to replace slow manual processes will allow you to be faster and more efficient, thereby helping you meet (and even exceed) those deadlines.

# 2: Create Standardized Processes

**How do you generate proposals now?** Is it chaos, where everyone involved scurries around contributing pieces to a proposal in hopes that the end result will be better than the means to get there? Or is it an organized, systematic process where all involved offer their best, culminating in a first-rate product? Traditionally, the proposal process is administratively heavy, requiring the incorporation of multiple documents from various contributors (e.g. sales, finance, and professional services), and can be a tedious, error-prone load on a sales rep.

Making the effort to look closely at how you currently create proposals and investing the time to improve them will result in a repeatable proposal process with the highest quality product. Having this process will also make it scalable, allowing a faster ramp up for new employees. Furthermore, incorporating automated quote and proposal technology into your proposal process will streamline that former chaos, and your sales team will welcome the opportunity to easily and quickly generate a proposal instead of dread it.



# 3: Offer Meaningful Options

How unhappy would you be if you went to the electronics department to buy a television and there was only one to look at? Your customers are much the same.

**Offering just one solution runs the risk of disappointing your customers.**

However, if you expand your options to three — the “great” solution, the “greater” solution, and the “greatest” solution — you’ll make your customer aware of all your excellent services AND they might just upsell themselves.

**What’s more, you should deliver your proposals with a clear course for customers to easily ACT on their option of choice — because they will!**

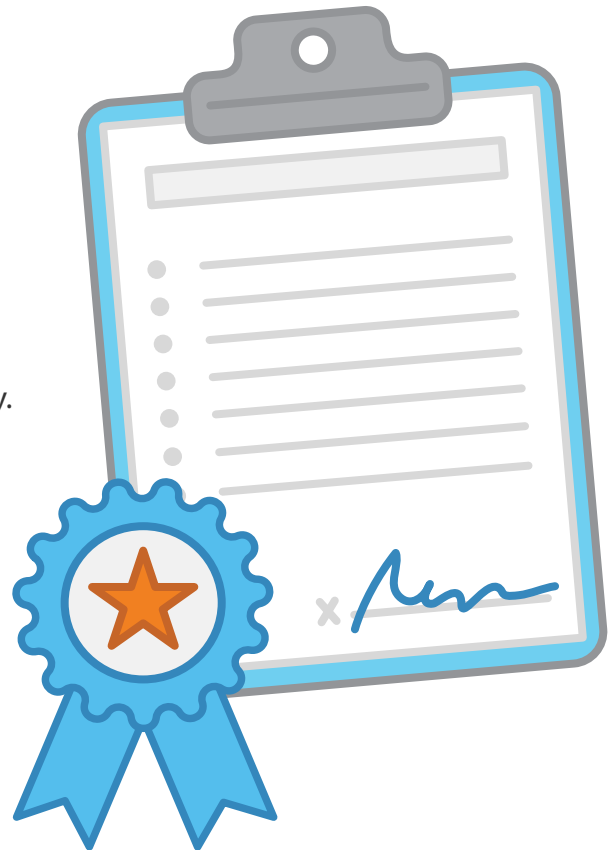


# 4: Remember, Image is Everything

Just because the proposal is typed and you've used a word processing program for some fancy bullets, does not mean its professional quality. If your customer feels you didn't put any effort into your ordinary-looking proposal, they won't take the time to read it and won't feel confident that you'll put much effort into any work you do for them.

Your proposal reflects your company's professionalism, service, and dedication to doing everything to the highest professional quality standards. Be sure your proposal contains no spelling or grammatical errors. Show your creative skills in your proposals. **Not all solutions are cookie-cutter, and your proposals shouldn't be either.** If you took good notes during your assessment call, incorporate some of that information into your proposal to show how well you listened.

Automated proposal programs have style templates and structure, so when you use an automated proposal program, your proposals will look good — every time! What's more, when you use a quote and proposal tool that offers customization options, you can make your quotes and proposal match your company branding and build a positive association this way.

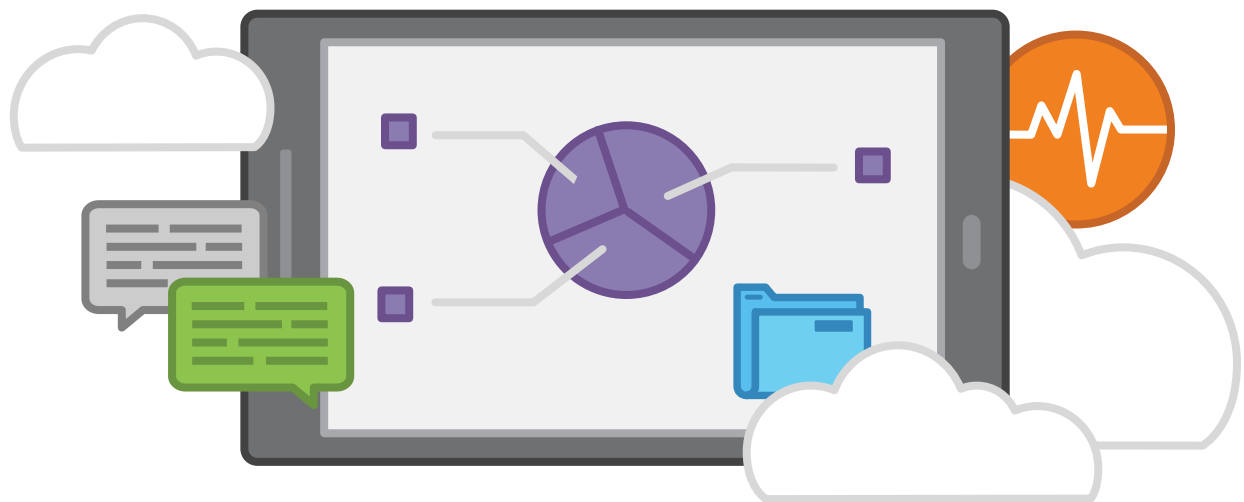


# 5: Integrate to Streamline

**Picture this:** a sales representative walks into the office of his prospect with his tablet. They continue the conversation regarding some issues the customer is having and the solutions the sales rep is offering. The sales rep enters all this information into his tablet. From here, he can generate a proposal on the spot, the customer can sign the agreement on the tablet, and the sales order is processed instantly. Or he can email the proposal for the customer to complete electronically.

In this case, the sales rep has the ability to generate a compelling proposal on-site with the prospect. You could have the same advantage, too. **You'll need to merge your opportunity creation and sales management platforms with your product fulfillment system to ensure your proposals are tracked and accurate.** Integrating your systems so all information is centrally housed and easily accessible will guarantee a more streamlined process and happier work lives for everyone.

In the cloud world, there are quoting platforms that allow you to create and present your proposal electronically through one easy-to-access link. Any updates or changes to the proposal are completed on the back end, and every time the customer views it, they see one, always-up-to-date version (which means no messing with “do you have the right version?” issues). For your electronic buyers, this is another example of how an automated proposal system will streamline the entire proposal generation process.

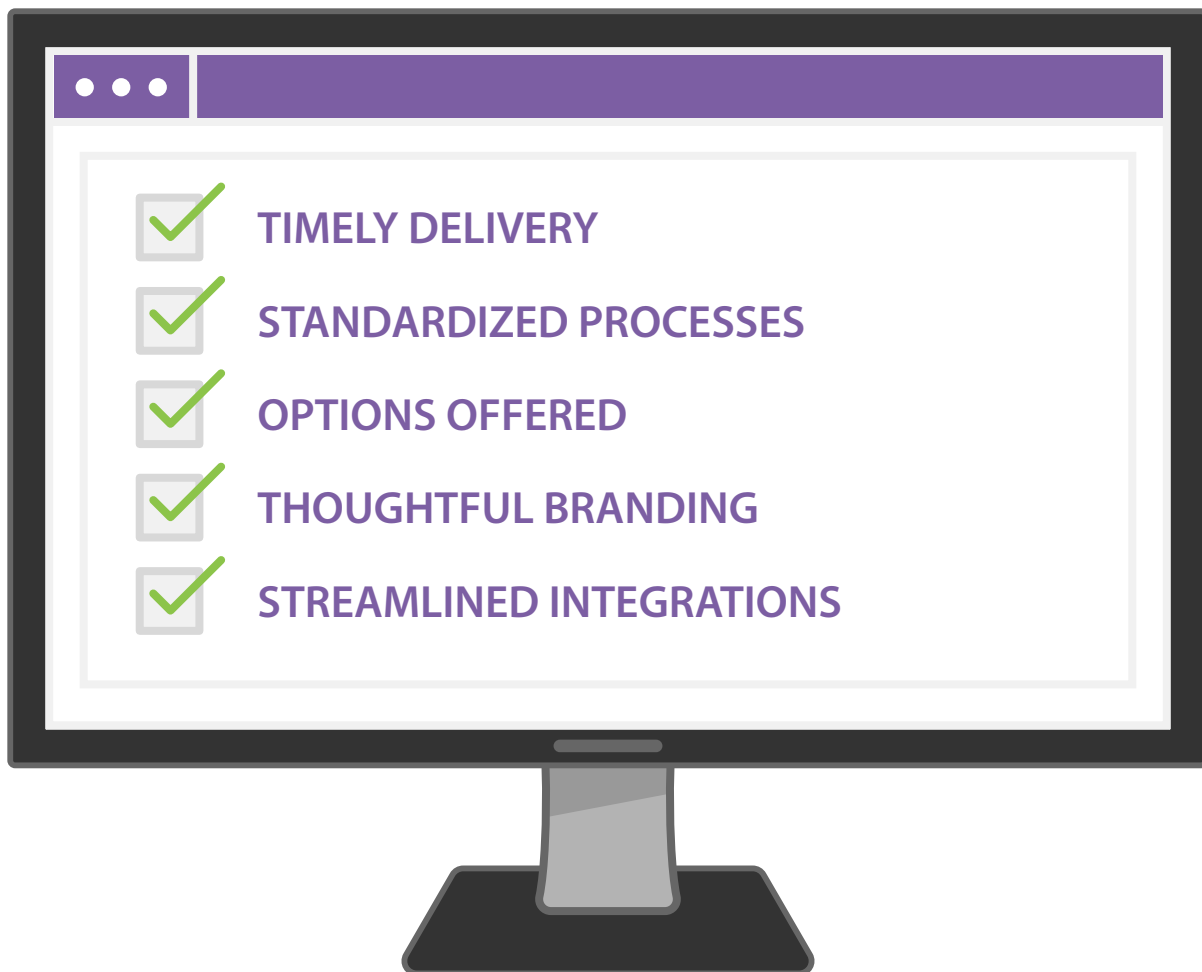




# Conclusion

## Invest in Your Quote and Proposal Processes

You've talked through problems and solutions with your prospect and have developed a relationship, and now you're ready to offer your proposal. You know that the proposal is the first solid evidence of your work quality. Invest in your proposal platform and process. Having a repeatable process based on the latest technology and streamlined with your business management platform or CRM will ensure an efficiently processed order. Devote time and resources into training everyone associated with sales on the proposal process. And finally, invest in your branding, image, and marketing to get that professional look that epitomizes who you are. **Put these five steps together, and your proposal will stand out against a sea of lackluster competitors.**





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