

Proposal Writing Made Easy

Sales Booster



Theme

Great proposals spur the client's interest to buy. They also help sell value over price and act as a great sales tool for the seller when the prospect needs to discuss your solution with someone else. Often sellers experience writer's block or minimize the importance of the proposal. With the experts' 5 Key Proposal Elements, putting a great proposal together is easier than you think. Watch all future proposals go from just a document to a great sales tool!

Approximate Preparation Time

- 20 Minutes



Materials

- Prepare 3 flip charts as per outline
- Flip chart and markers
- Proposal Elements Checklist – 2 per seller
- 2 Sample Proposals - one copy for every two sellers (i.e. if there are 12 sellers, then make 6 copies of each proposal)
- Sellers bring at least one proposal they have written and presented or one to be presented in the near future
- Success Achievement Plan worksheet - one per seller



Success Set-Up Tips



- Each seller will review one of their own proposals in the last activity. In advance of the scheduled Sharpenz meeting, please request that each seller select a proposal they have previously written or one to be presented in the near future.
- 2 Sample Proposals are needed. Review any available proposals (from your company or proposals you have received from a vendor) and select 2 that are not good proposals. If they are proposals from your team, to protect the seller from any potential embarrassment, remove the seller and client's names from the proposal.

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Success Set-Up Tips - continued

- Divide sellers into two equal groups. Each group will have the opportunity to review both proposals.
- For the activity that asks sellers to create a list of “must” items, it is beneficial for this list to be 15 – 20 items.
- Each seller receives two copies of the Proposal Elements Checklist. Do NOT distribute the Proposal Elements Checklist in advance. Please only distribute when instructed to do this. Having the handout in advance will reduce the effectiveness of the first activity.
- Additional information on the Responding to Objections Page. This is an optional key element. Often sellers have an opportunity to present to a prospect that is purchasing from a competitor. (i.e. Customer is advertising with a radio station and you are proposing they add television to the media mix.) It is common for the customer to mention this during your presentation. To be proactive regarding an objection like “I’m using ABC and it’s working just fine,” the seller may want to include some information addressing this barrier. For example, include a page that lists what each product does and point out how yours provides more value.
- Additional information about the value of the Summary Close Page. Often the price/investment page is the last page of a proposal. When price is the last page, the seller is asking for the decision to buy when the prospect is looking at the price. Consider this, the seller has just asked for the decision to buy. The prospect is thinking about everything they heard and weighing their options. They are looking at the price. Often the price gets bigger and bigger in the prospects’ minds, and they overlook the benefits they will receive. The recommendation in Proposal Writing Made Easy is for the last page to be a Summary - Close page which recaps the benefits the customer will receive. Now, when the seller asks for the decision, and the prospect is thinking, the prospect is looking at all of the benefits of what your product and services will do for them, rather than the price.

Proposal Writing Made Easy

Time	Session Outline	Dynamics	Visual
	Opening Welcome to today's sales booster, Proposal Writing Made Easy. Today we'll look at ways to eliminate writer's block and how to turn our proposals into a more powerful selling tool. At each table there is a proposal. There is one copy for each seller to use. Please do not write on these proposals, as others will also have the opportunity to view them. With the proposal in front of you, please review the proposal through the lens of the customer. For example, a colleague is considering purchasing a company's product or services and they gave you the proposal to review. With that "lens", if you were the customer, what would you think? Use the flip chart page at your table and chart your likes and dislikes as you go through the proposal. Please do not be too critical of this proposal and do not be overly concerned with the words and phrases used. Your objective is to take a quick look through and write your first impressions. (Allow 5 minutes) Thank you. Now, please gather the proposals you just reviewed along with your flip chart page and pass them to the other table so that each table has a different proposal to review. Use a different color marker than the one that is already on the chart and complete the same exercise of likes and dislikes for this second proposal. If your likes or dislikes are already listed on the chart, place a check mark next to the comment. Please add any new thoughts on the flip chart.	Large Group  Table Groups 	Sample Proposals  Flip Chart Pre-written One Column Likes, One Column Dislikes 
	Our Thoughts on Proposal Musts You have reviewed 2 proposals. Pass the flip chart page back to the table that you switched with and review both sets of comments.	Table Groups 	Table Groups Completed Flip Charts 

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	(Allow 1 – 2 minutes) What did you like about these proposals? (Allow for responses) What didn't you like? (Allow for responses) Based on your likes and dislikes, we'll use this feedback to make a list of the MUSTS you think should be in a proposal. We'll rotate around the room for each seller to add one item to the list. (Allow for a list of 10-15 components) <i>Possible responses:</i> • <i>Client's name and company name</i> • <i>Sellers contact information</i> • <i>Date</i> • <i>Page numbers</i> • <i>Sources</i> • <i>Customer's needs listed</i> • <i>Solution</i> • <i>Pricing</i> • <i>Samples</i> • <i>Testimonials</i> • <i>Schedule</i> • <i>Product description</i> • <i>Purchasing options</i> • <i>Company history</i> • <i>Marketing information</i> • <i>Comparisons to competitors if applicable</i> That's quite a list! If I were going to look at this list each time I sat down to write a proposal I might not want to write the proposal. It can seem overwhelming. Let's make it easier as your must list can be summarized in a list of the 5 key elements the experts say should be included in an effective proposal.	Large Groups 	Flip Chart "Must" Responses 

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	Key Elements The 5 key elements to a proposal are: 1. Cover Page 2. Needs/Objectives Re-cap 3. Solution 4. Respond to Objections (optional) 5. Summary - Close When you look at the list of the 5 elements, do they look familiar? (pause) They may be, as they are the steps to an effective sales call. Use your Success Achievement Plan worksheet for the following exercise. <table><tr><th>Steps to a Sales Call</th><th>Key Elements of a Presentation</th></tr><tr><td>Introduction</td><td>Cover Page</td></tr><tr><td>Discover Needs</td><td>Needs/Objectives Re-cap</td></tr><tr><td>Presentation</td><td>Solution</td></tr><tr><td>Objections</td><td>Respond to Objections</td></tr><tr><td>Close</td><td>Summary - Close</td></tr></table> Interesting how our proposals should follow the same format as the sales process. What is the value for a proposal to follow the sales process format? Possible responses: • Makes sense to follow steps to a close • Keeps us on track • Logical progression to a sale Looking at our initial list of musts, there are more than these 5 elements. What we will do next is match the list of “must haves” to the 5 key elements of a proposal. For each item on the list, we’ll determine where it fits within each of the 5 elements. I’ll write the key element next to each item. Large Group  Flip Chart with 5 Key Elements  Success Achievement Plan Worksheet  Flip Chart with Steps to a Sales Call and Key Elements of a Presentation 	Steps to a Sales Call	Key Elements of a Presentation	Introduction	Cover Page	Discover Needs	Needs/Objectives Re-cap	Presentation	Solution	Objections	Respond to Objections	Close	Summary - Close
Steps to a Sales Call	Key Elements of a Presentation												
Introduction	Cover Page												
Discover Needs	Needs/Objectives Re-cap												
Presentation	Solution												
Objections	Respond to Objections												
Close	Summary - Close												

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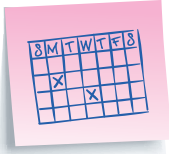
Time	Session Outline	Dynamics	Visual
	For example: Client's name and company name would be part of the introduction which is the Cover Page. I'll use CP as a shortcut. <i>(Possible other responses)</i> <i>Sellers contact information</i> <i>Cover page</i> <i>Date</i> <i>Cover page</i> <i>Page Numbers</i> <i>All</i> <i>Sources</i> <i>Bottom of appropriate page or in presentation pages</i> <i>Customer's needs</i> <i>Needs re-cap (Needs)</i> <i>Recommendation</i> <i>Solution (S)</i> <i>Pricing</i> <i>Solution (S)</i> <i>Samples</i> <i>Solution (S)</i> <i>Testimonials</i> <i>Solution (S)</i> <i>Schedule/Timeline</i> <i>Solution (S)</i> <i>Product description</i> <i>Solution (S)</i> <i>Purchasing Options</i> <i>Solution (S)</i> <i>Company history</i> <i>Solution (S)</i> <i>Marketing information</i> <i>Solution (S)</i> <i>Comparisons to competitors if applicable</i> <i>Objections (Obj)</i> <i>Close</i> <i>Summary-Close page (SC)</i> All of our musts do fit into one of the 5 elements. Next time you write a proposal simply check for these 5 elements to make it easier.	Large Group 	Flip Chart with "Must" Responses 
	Review of Your Proposal Today we're discovering how to make proposal writing easier. Earlier you reviewed a sample proposal. It was easy to see	Individual 	

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	what does and doesn't work. Let's review one of your proposals to see how it matches up to the 5 key elements. An interesting point is: it's often harder to use the same filter on your own proposals. To help, there is a Proposal Elements Checklist. Use the next 3 minutes to review your proposal from the customer's viewpoint. What do you like and dislike about it? How well does it follow the 5 key proposal elements? Use the Proposal Elements Checklist to make your notes. (Allow 3 minutes) Now with a partner, discuss what you discovered about your proposal and what you'll do the next time you write a proposal. We'll allow 1 1/2 minutes per person.	Individual  Pairs 	Seller's Proposal  Distribute Proposal Elements Checklist 
	Success Achievement Plan Worksheets Sellers complete the Success Achievement Plan worksheet. Proposals can be easy. Next time you write one think about the 5 Key Elements and use the Proposal Elements as a guide.	Individual 	Success Achievement Plan Worksheet 

Reinforcement Tips

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Reinforcing the Message

- First opportunity: 1 - 4 weeks
- Repeatability: As needed

Facilitation Ideas



- Sellers each bring a recent proposal they have written. In pairs, sellers switch proposals and review the proposal with the 5 Key Proposal Elements Checklist. In the same pairs, sellers give verbal feedback on their findings.
- Create a proposal template for a new product or service. As a large group or in teams, discuss what items and information would be included in a proposal for the new product or service. Collectively create the template. An additional option is to ask to each seller to select a prospect or customer and use the template.

Next Sales Booster



- *Quick Prep to Faster Sales* or *4 Quick C's to Powerful Presentations* found at www.30minutesalesmeetings.com

Success Achievement Plan

Proposal Writing Made Easy



Key Elements to a Proposal

1. _____
2. _____
3. _____
4. _____
5. _____

Steps to a Sales Call

Key Idea I gained today on Proposal Writing Made Easy:

The Specific Action I will take to increase my success this week:

The resources I may need to implement the Specific Action: (people, time, dollars)

Proposal Elements Checklist

Element	Included	Not Necessary	Adjustment
Cover Page - Client Name and company - Seller name and contact information - Date - Proposal Title (i.e. Marketing Proposal Especially for)			
Needs/Objectives Re-Cap			
Solution - Marketing Information - Options - Pricing - Company Profile - Product Overview - Testimonials - References - Other			
Respond to Objections (optional)			
Summary – Close - Re-cap of Needs/Objectives			
Other - Spelling and Grammar - Visually Appealing - Personalized			

