

We have culled together a few observations, scenarios and tips to help make your life easier. Let us know what you think and please take the opportunity to share your experiences with us.

Proposal Writing Tips*:

1. Keep it short, especially for the Stage 4 Action proposal. These folks are ready to take action and are not in the mood to have their time wasted. They need to see the match between your two companies, they have the power to make the decision now, they have the timeline in place and they have the dollars ear-marked.
2. Focus on your clients' business requirements or mission objectives first. Use the information that you collected during your Needs Assessment and incorporate their vocabulary into your document.
3. Present an interim or planning proposal for a Phase 1. Be careful not to move too quickly and give too much away. If you show all your cards too early, you may be positioning yourself to be outplayed by your competition.
4. A strong ROI Statement is absolutely essential. The second to last paragraph in your proposal must be your irrefutable Return on Investment Statement outlining clearly the deliverables. Ensure that they see the value *before* you ask for the order.
5. Divide the proposal into sections. This will allow *you* to control the amount of information shared in the time allotted. Time is something you cannot control, but you can manage the players and their allocation of time.
6. Use three ring binders with pockets for your proposals. Your clients can add information as your relationship progresses, but more importantly, you will control the information shared and the timing of it.
7. Executives skim. Make your document visually attractive and easy to read by highlighting the main ideas. Use bullets, headings and subheadings, boldface type, color, borders, and graphs.
8. Clearly state your “differentiating factor”. What do you have that your client-to-be requires and that your competition will never have within the time frame your client-to-be needs it?
9. Use Sant ProposalMaster™ software. It will save you the valuable time required to build lasting, mutually rewarding relationships.

*Inspired by Dr. Tom Sant – Persuasive Business Proposals, Amacom, January 2003

Presentation TIPS:

1. Keep the process simple. Ask for the order first! They may be satisfied with the information that they have. Then present the invoice. Ensure all details are outlined in your contractual agreement to clearly communicate expectations on both sides.
2. Have all the documents necessary to close the deal at your disposal. A surgeon has all of his instruments at his side; shiny clean and always waiting in the same place for quick and easy access.
3. Present proposals in the context of *“here is an outline of our understanding...”* It is a discussion document used for clarification purposes and will be the foundation of your Contractual Agreement. Take your time.
4. Always *present* your proposal in person, never “submit” it. How can you get the check if you are not there?
5. Always ask, *“How much time do we have?”* before you all sit down at the table. If you do not have enough time, reschedule the next appointment.
6. Go for the close at least three times. If all else fails, use the “Take Away”.
7. Law School 101: Always, always book the next appointment. You need to ensure that you or your company continues to invest the time required to build that valuable relationship, no matter what Stage of Acceptance they are at.
8. Ensure that your PowerPoint presentation refers to the page numbers referenced in your proposal. This will enable your audience to follow along and will avoid unnecessary interruptions.
9. Control the momentum, the timing, and the pitch. Think of it as theatre, or reading a brilliantly written novel. Your audience must enjoy the experience even though they are quite familiar with the ending.

Assistance Available

We look forward to hearing about your success.

For more proposal writing and presentation tactics and strategies, subscribe to our newsletter by contacting Ryan Smith, Project Manager at 1-800-998-4547 or email Ryan@TheRevenueBuilder.com.

Happy revenue building!

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