



## Writing Winning Sales Proposals

**A sales proposal offers to sell services or products, usually for a set completion date for an agreed-upon price.** Writing a sales proposal is a very important step in gaining a new client, or selling to a current one.

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### **1.0 Getting Started**

A good proposal is a big investment in time, but when done properly can mean additional business and, therefore, added revenues for your firm. You should consider writing a proposal when

- there is an identifiable chance that you will get the business. If it's a long-shot, you may be wasting your time when it can be better spent on more likely prospects.
  - when the proposal can be used with other prospects, but personalized to represent their special needs.
  - when you must use a proposal to get onto authorized bidders lists.
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### **2.0 Three Basic Objectives of Sales Proposals**

**First**, it educates prospective clients about the full nature of their need. Often, prospective clients may be aware of only a portion of their need. This may be a perfect opportunity for you to demonstrate your ability to see "the forest from the trees" as an objective third-party expert.

**Second**, the proposal convinces the prospect that you have the competence to deliver what they need, better than they can themselves.

**Third**, the proposal provides justification for the prospects' investment in terms that are useful and understandable to the client.

However, to convince your clients that you are the best person for the job, you must get them to read your proposal. So how do you get busy executives to lay aside other pressing issues and pick up your proposal? The answer is to **write a proposal that satisfies their needs, not one that sells your services**. And to do that, you must have a full understanding of the nature, scope and needs of the prospect and present your ideas in a manner that convinces the prospect that your product or service represents the best way to handle their needs.

Keep in mind that you must convey the feeling that you are the expert to all who read the proposal.

The proposal must showcase your value to your prospects' organizations. You have to convince your prospect why they cannot fulfill their needs with resources internal to their organization.

You must differentiate your goods or services from the competition if you can first show your prospects that they need external resources to satisfy their needs, then you must convince them that you are the best choice for the job.

The proposal offers value-added solutions. Organizations are not interested in novelty approaches. They have problems that need solutions quick. The winning proposal will outline how clients can solve their problems and achieve their objectives, as well as look good to the rest of the organization especially their boss.

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### **3.0 Creating the Proposal**

Generally speaking, there is no standard length to a proposal. Depending upon the business you are in, a proposal may be a two-page letter or a ten-page document. It is important to know the protocol if there is any. Imagine how ridiculous it would be to submit a short letter when your competition has presented the client with a voluminous dissertation, not to mention the fact that you'd probably miss out on the chance of a good assignment. In some cases, a request for proposal (RFP) might be sent to potential suppliers/service providers by the prospective client to bid on a project or assignment.

Frequently, these RFPs set very clear guidelines regarding the desired content and length of the proposal. When this information is provided, follow it to the letter. Clients stipulate their requirements this way for a good reason often because they anticipate reviewing several proposals at once. They want to be able to easily compare the submitted proposals. **If they can't find the desired information quickly, they won't spend the time to look for it.** Here, innovation will not be rewarded. However, in cases where client requirements are unknown, the best advice is that the proposal should be as long as it needs to be to clearly describe the work you intend to do. Regardless of the length, though, there are some necessary steps you should take and some standard features that your proposal should include. You'll find them in the following sections.

As you read these next sections, you may find it helpful to refer to the sample proposals linked in the Mod 5 writing assignments page for further clarification and examples.

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### **4.0 Writing for the reader's needs**

The proposal's readers are usually in a position of authority - supervisors, managers, department heads, company buyers, elected officials, civic leaders – to endorse or reject the writer's plan.

Sales proposals are persuasive plans: your proposal must convince the reader that your plan will help them improve business -- that you are "uniquely qualified."

The tone of the proposal should be "Here is what I can do for you." Stress the precise benefits your plan has for the reader. Show readers how approving your plan will save time and money or will improve employees' morale or customer's satisfaction. Above all, make sure you answer the reader's most important questions:

- How will you serve our needs better than your competitors?
- Why should we hire you instead of someone else?

Competition is fierce in the world of work, and a persuasive proposal frequently determines which company receives a contract. Demonstrate to your reader why your plan is better – more efficient, practical, economical - than a competitor's. In a sense, a proposal combines the persuasiveness of a sales letter, the documentation of a report, and the binding power of a contract, for if the reader accepts your proposals, s/he will expect you to live up to its terms to the letter.

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### **5.0 Kinds of Proposals**

Proposals are classified according to how they originate – solicited or unsolicited – and where they are sent after they are written – internal or external.

- A solicited proposal (which is what we're doing for our class) responds to a specific call for proposals.
- An unsolicited proposal is not a response to a specific call but is usually originated by the writer who identifies a need and prepares the proposal in the chance that it will be seriously considered.

As they suggest, the terms "internal" and "external" refer to the audience and the format the proposal takes.

- Internal (memos) proposals are for supervisors and are also called justification reports because they justify a change in policy or expenditure.
  - External (letter memo with headings) are for customers and clients.
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### **6.0 Organizing your proposal**

As with reports, how you structure proposals depends on whether you expect your audience to be receptive. In general, your audience may be more receptive with solicited proposals, since the problem and the solution have already been identified. Your solicited proposal would use the direct approach, and you would focus on your recommendations, which respond to the work specified in the RFP (request for proposal.)

Because your audience may be less receptive to unsolicited proposals, you may do better to use the indirect approach. When writing unsolicited proposals, you must first convince the audience that a problem exists, and, if you're unknown to the reader, you need to establish your credibility. To convince the reader that your recommendations are solid and logical, you unfold your solution

to the problem using one of the logical arguments discussed in our previous module (2 + 2 = 4 approach or yardstick approach). As you unfold your solution, you have two goals:

1. to persuade readers to accept your idea and award you a contract, and
2. to spell out the terms of your proposal in the report's content.

Remember that a proposal is essentially a sales or promotional kind of thing.

1. **Introduce the proposal**, telling the readers its purpose and contents. The introduction answers all these questions that apply to the situation:
  - Statement of Problem and Objective - What problem do you propose to solve? In general, what solution are you proposing?
  - Benefits – what are the benefits for the reader? Why should the reader adopt your proposal?
  - Qualifications – What are your qualifications for this project? What makes you credible?

From the beginning, your goal is to sell your idea, to persuade readers the job needs doing and you are the one to do it. If your introduction is long-winded, evasive, or vague, readers might stop reading. Make it concise, specific, and clear.

Spell out the problem to make it clear to the audience—and to show you understand it fully. Explain the benefits of solving the problem or undertaking the project. Identify any sources of data. In a research or sales proposal, state your qualifications for doing the job. If your plan has limitations or contingencies, explain them. Finally, give the scope of your plan by listing the subsections to be discussed in the body section.

2. **Present the background** --the problem, opportunity, or situation that brings about the proposed project. Get the reader concerned about the problem, excited about the opportunity, or interested in the situation in some way.
3. **State what you propose to do** about the problem and **how you intend to help** them with the situation.
4. **Discuss the benefits** of doing the proposed project, the advantages that come from approving it.

The body will receive most attention from readers. It answers all these questions that are applicable:

- Methods – How will it be done?
- Timetable – When will it be done? How long will it take?
- Materials, Equipment, and Personnel – What materials, methods, and personnel will it take?
- Facilities – What facilities are available?
- Cost – How much will it cost, and why?
- Expected Results – What results can we expect?
- Feasibility – How do we know it will work?

Here you spell out your plan in enough detail for readers to evaluate its soundness. If this section is vague, your proposal stands no chance of being accepted. **Be sure your plan is realistic and promises no more than you can deliver.** The main goal of this section is to prove that your plan will work.

5. Describe exactly what the completed project would consist of, what it would look like, how it would work--**describe the results of the project.**
6. Discuss the method and theory or approach behind that method--**enable readers to understand how you'll go about the proposed work.**
7. Provide a schedule, including major milestones or checkpoints in the project.
8. **Briefly list your qualifications** for the project; provide a mini-resume of the background you have that makes you right for the project.
9. **Now (and only now), list the costs of the project**, the resources you'll need to do the project.
10. **Conclude with a review of the benefits** of doing the project (in case the shock from the costs section was too much), **and urge the audience to get in touch** or to accept the proposal. End on a strong note, and keep it short. Promote why your company is the best selection. Repeat the significant benefits that your prospect will receive.

**Notice the overall logic of the movement through these sections:**

- you get them concerned about a problem or interested in an opportunity,
- then you get them excited about how you'll fix the problem or do the project,
- then you show them what good qualifications you have,
- and then hit them with the costs, but then come right back to the good points about the project.

In addition to information, you should also look for a **visual aid** to include within your report. The visual aid is an essential part of helping the reader fully understand the benefits of your proposal get into the habit of providing visual aids whenever you can. Visual aids are particularly helpful in business reports because they help our readers understand (and then act correctly upon) our reports.

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## **7.0 Tips**

According to Sales Proposals.com, here are the top 10 ways your proposals can help you increase your Proposal Close Ratio.

### **1. Focus on the Customer**

Your sales proposal is customer-centered. It defines the business opportunity, current situation, financial impact, and the buyer's needs and objectives.

### **2. Practice Consultative Sales**

A compelling proposal results from a consultative sales process. Avoid "boilerplate" proposals or proposals that read like poorly written brochures.

### **3. Define the Application**

Your sales proposal explains how your product or service will work in the buyer's business. By defining the application, you answer many questions for the buyer and provide the information needed to make an informed buying decision—a function of consultative selling.

### **4. Calculate Benefits--Buyer Value**

Your proposal measures how your product or service will make or save money for each buyer—the financial benefits. This provides compelling financial reasons to make a change—another function of consultative selling.

### **5. Show Non-financial Benefits—Buyer Value**

Your proposal converts your product's benefits or service's capabilities into buyer-specific benefits. These are the benefits that are not easily measured in monetary terms—another function of consultative selling.

### **6. Describe the Implementation**

Be specific by including methodology, schedule, and the staff required to implement the solution. This reduces your buyer's perceived risk and answers How? How long? and Who?

### **7. Include Pertinent Seller Information**

Your sales proposal assures the buyer that your organization can deliver on the contract. It includes a company profile that differentiates your company from the competition.

### **8. Highlight Business Information More Than Technical Information**

Buyers make decisions on business information, so your proposal should not overwhelm readers with the technology. Your sales force understands that the buyer wants to know how the technology will improve his business not why your new widget will make his network run faster.

### **9. Develop Proposal Standards**

Develop proposal standards and models. Proposals that win the big deal do not read like a hodgepodge of ideas and writing styles. Proposal models reinforce your consultative sales process and help your sales professionals think and write clearly.

### **10. Represent Your Company's Quality Standards**

Understand that your sales proposal is a critical customer communication. Spend the time and effort needed on the content, design, and packaging to produce a "benchmark" proposal for your buyers.

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## **8.0 Sales Proposal Checklist**

Once your proposal is completed, subject it to the following to insure that you have included all of the key items:

- Does your proposal address the underlying purpose of the prospect's need?
- Is there any danger that the prospect could misunderstand your approach to provide him with a solution? Have you clearly presented your approach?
- Is the work you intend to perform covered in sufficient detail?
- Have you expressed compelling enough reasons why you should be selected to supply the goods or services?
- Is your proposal written from your prospect's perspective? Do you use language with which he is familiar? Do you know his personal or his organization's key objectives?
- Are your fees or costs clearly stated? Do they follow a description of your approach and benefits?
- Will the client understand what he or she is supposed to do upon reading the proposal?
- Make sure you use the right format. Remember, the memo format is for internal proposals; the business-letter format is for proposals written from one external organization to another.
- Make sure the sections are in a logical, natural order. For example, don't hit the audience with schedules and costs before you've gotten them interested in the project.
- For internal projects, don't omit the section on costs and qualifications: there will be costs, just not direct ones. For example, how much time will you need, will there be printing, binding costs? Include your qualifications – imagine your proposal will go to somebody in the organization who doesn't know you.

Make adjustments in your copy accordingly. When this is completed, you are ready to send off your proposal. One option is to mail it. You may choose to send it via standard delivery or overnight it. Although an overnight courier service may be more expensive, the receiver takes special note when he receives such packages. That's what you want.

**If It's Possible, Deliver Your Proposal To Your Prospect Personally.** This reinforces your interest in the project and provides an opportunity to meet your prospect if you haven't already done so. Either way, once the final document is delivered and the prospect has had a sufficient time to review it, follow-up with a phone call or visit to ask if you can clarify any aspects of the proposal.

If you don't hear from the prospect in a week to ten days, send him a letter reiterating your interest in his project. Be assertive, not a nuisance. If you've done everything you can think of within reason and still do not hear from the prospect, chalk it up to experience and get on with your business. Hopefully, you'll be able to utilize parts of your proposal for another prospect. In most cases you'll be notified by phone or mail whether your proposal was accepted or not. If it was not, try to find out why and learn from the feedback so that you can incorporate it into your next proposal.

sources: "Writing Winning Proposals," *Successful Writing at Work* by Philip Kolin (Houghton Mifflin Company College Division publisher); *How to Write a Sales Proposal*, Business Builder Module from Compass Bank at [http://bcr.compassbank.com/SBR\\_template.cfm?DocNumber=PL12\\_4000.htm](http://bcr.compassbank.com/SBR_template.cfm?DocNumber=PL12_4000.htm); Tips, Sales Proposals.com at [http://www.salesproposals.com/r\\_tips.shtml](http://www.salesproposals.com/r_tips.shtml); Online Technical Writing: Proposals at <http://www.io.com/~hcexres/tcm1603/acchtml/props.html>; Sales Proposals, Texas Tech University at <http://english.ttu.edu/student/studentwebs/Restore2311/Archive/Carter/Test/WebHelp/Lan00375.htm>, now redirected to <http://www.english.ttu.edu/>