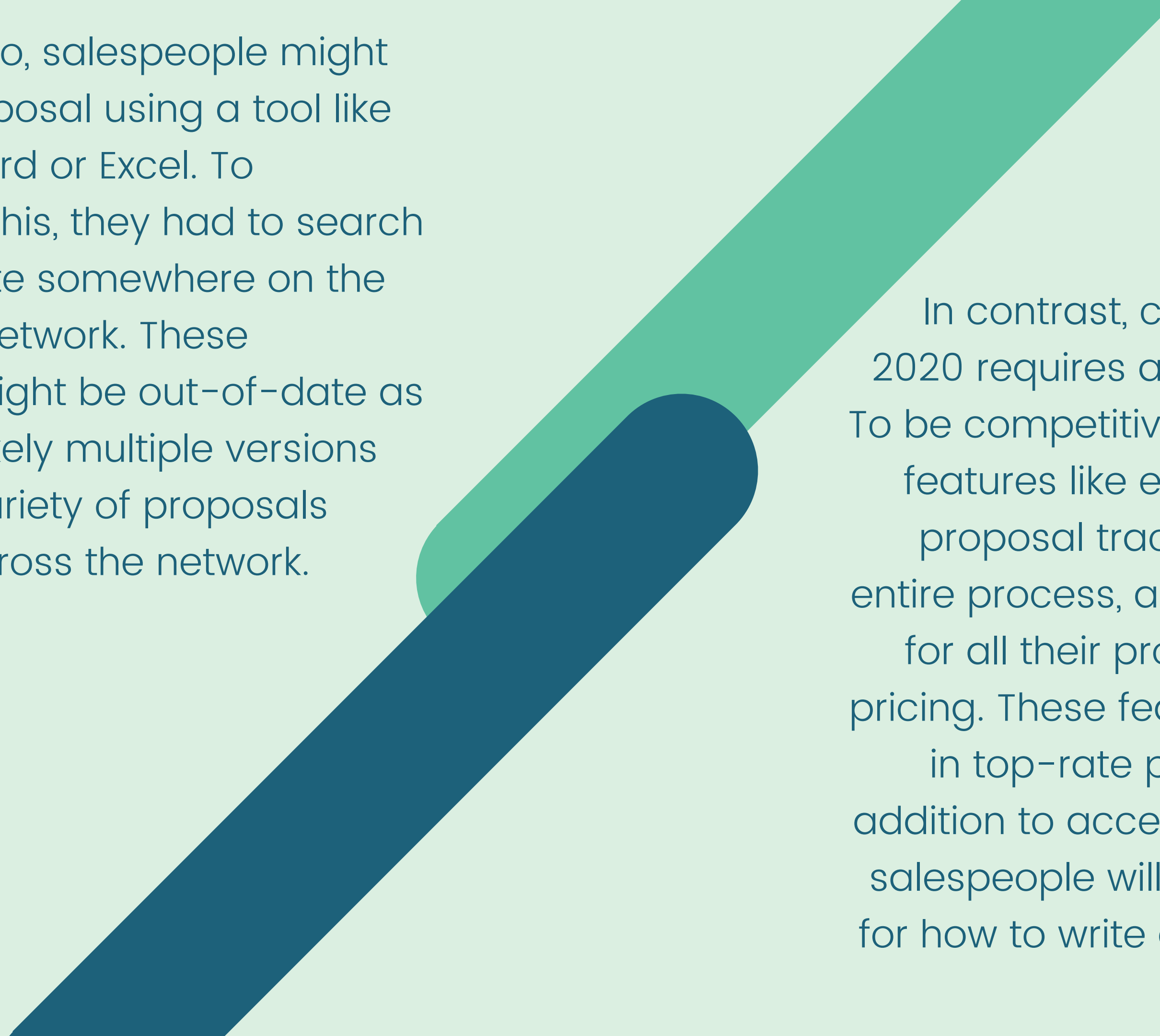




TOP TIPS FOR

How to Write a Business Proposal

in 2020



Ten years ago, salespeople might create a proposal using a tool like Microsoft Word or Excel. To accomplish this, they had to search for a template somewhere on the company's network. These templates might be out-of-date as there were likely multiple versions used for a variety of proposals scattered across the network.

In contrast, creating proposals in 2020 requires a different approach. To be competitive, salespeople need features like electronic signatures, proposal tracking throughout the entire process, a centralized location for all their proposals, and current pricing. These features can be found in top-rate proposal software. In addition to access to these features, salespeople will need these top tips for how to write a business proposal in 2020.

SHOW CUSTOMERS HOW TO SOLVE THEIR PROBLEMS

A great proposal needs to show that your sales rep has a clear understanding of the prospect's problem. The sales rep will need to collect this information while prospecting. The proposal will then show how the company has a solution that will solve the problem. Make sure your sales reps don't over-promise in the proposal. This could easily damage the relationship.



WRITE FOR THE DECISION-MAKER



As part of their research, the sales rep should find out more about the company they are prospecting. They need to know how long the company has been in that market, their challenges, concerns, and who are the decision-makers. This will help the sales rep understand how to appeal to the decision-maker. Sales reps need to understand what leaders are passionate about within the business. They will also need to have the benefits described in the language that will resonate with that audience.

CLEARLY DEFINE THE PROJECT GOALS

Sales reps need to clearly define the project goal. Business proposals need to be written so that the reader fully understands the goal of the project. This goal needs to be consistent with the problem identified. This singular goal needs to use simple language and avoid jargon.



SCOPE LIKE A PRO

The description of the project scope needs to list specifically what will be included within the project. It also needs to include items that will be excluded. The sales rep should also clearly define what milestones the project will achieve when successfully completed.

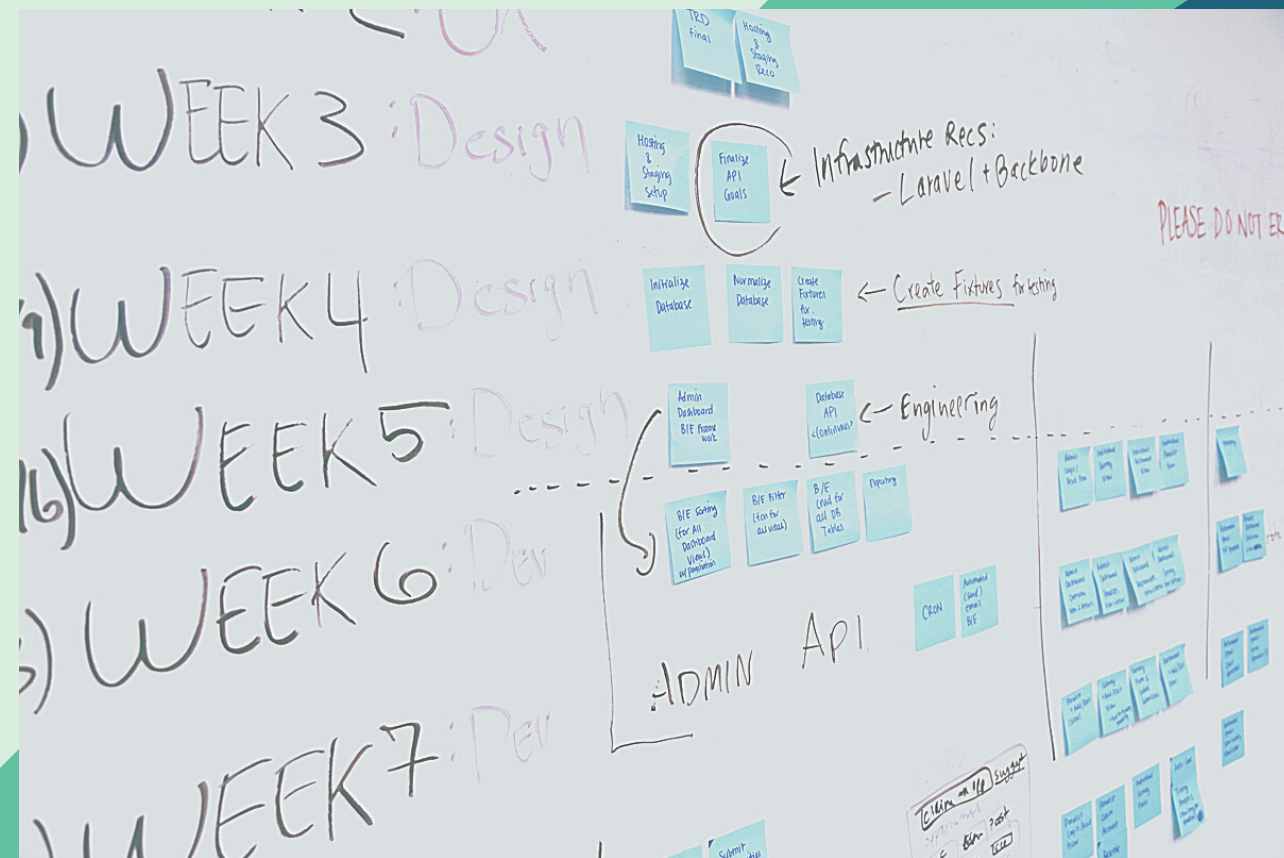
Also, sales reps need to identify any constraints that could cause problems with finishing the project. By listing these limitations, they can minimize the chance of a delay or that the project will be constrained because of potential issues.

Properly defining the scope of the project will help sales reps avoid having to rework the scope and make changes as it progresses. These changes can require that they invest more resources like money and time. Sometimes changes are necessary, but minimizing these changes by clearly defining the scope upfront can avoid the disagreements and additional expense later.

GET THE SEQUENCE CORRECT

First, your sales reps should divide the project into tasks by determining the relationships between the tasks as well as the critical path (the longest stretch of dependent activities). When sales reps sequence activities, they need to identify and then document the relationship among the activities. This will help them create a logical sequence of work they can use to improve the efficiency within the project constraints. As part of this sequence, they can also clearly define milestones.





IDENTIFY (AND SHARE) CRITICAL MILESTONES

Any important checkpoints along a project should be tracked as a milestone. Sales reps can list these within a proposal as requirements that are needed for the successful completion of the project. This will give them exact points in the project that management can use to track the status. Including these in the proposal will also allow all stakeholders to know which goals are required within the project.

ELIMINATE FLUFF

Encourage your sales reps to be concise when writing. Require that they remove any marketing fluff within the proposal. Within the text of the document, remove any slogans. Try to stay away from excited adjectives and adverbs. Remove any “marketing speech” (i.e. synergy, take it offline, think outside the box).

To provide more validity, include data sheets, the statistics, that will help to back up the claims your sales reps are making in the proposal. Always write in an objective, neutral tone of voice.



BUILD TRUST

UNDERSTAND THAT BUILDING TRUST CAN TAKE TIME. IT WILL ALWAYS BE A FACTOR IN THE DECISION-MAKING PROCESS. SOME WAYS YOUR SALES REPS CAN IMPROVE THIS IS TO TAKE THE FOLLOWING STEPS:

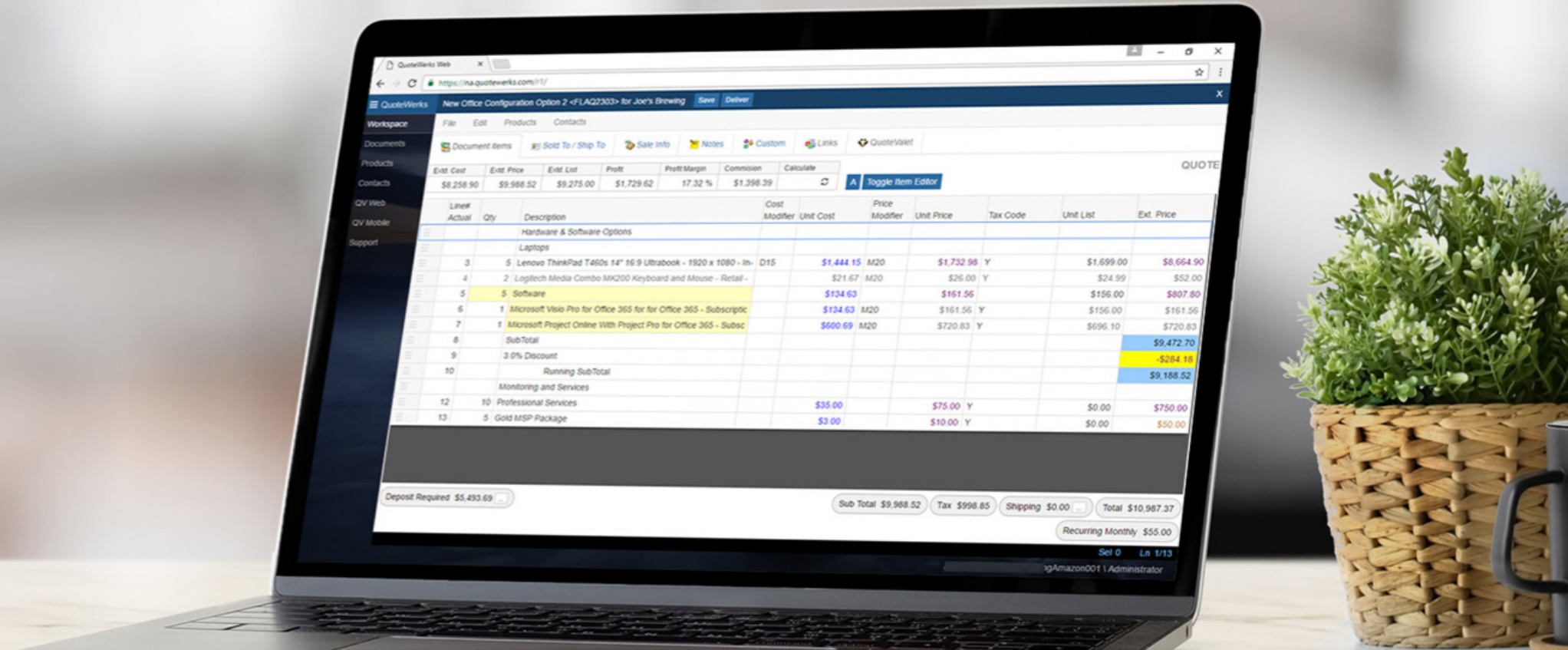
- ➡ Always take the opportunity to clarify any confusing sections of the proposal.
- ➡ Take the time during the presentation to listen and ask open-ended questions to learn more. Take notes on what is learned and bring them back for future proposals.
- ➡ Include testimonials from existing customers.
- ➡ Make the presentation personalized.
- ➡ Present options allowing the prospect to make decisions based upon their needs.
- ➡ Make sure to always include the latest pricing so it doesn't have to change later and destroy the trust that has been built.

The Final Touches

These are a few tips on how to write a business proposal. Sales reps should always remember to review the proposal when it's done and identify any weaknesses. While everyone may brag about value for money, it is more important that your company demonstrates how your improvements will add to profitability.

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