



Killer Proposals

Guidebook

Introduction: Killer Proposals

Congratulations You're Almost There! Ok you have gone through the marketing process, targeted your customer, prospected them, qualified them, met with them more than likely multiple times, measured the job and performed an estimate. Now you are at the proposal phase of the sales process. The proposal phase is a great place to be and congratulations for getting this far with your qualified prospect. Obviously a lot of the right things are going right and to arrive here is cause to celebrate. Now the fun begins as this critical phase can most certainly make the difference of winning the job or not.

Bring It On! The words "send me a proposal" are music to the ears of many companies. The invitation to write a proposal is a milestone in the sales cycle an opportunity to get one step closer to a client and a new project. Even though they might not really enjoy writing proposals, most Business Developers jump at the chance because they believe that exciting, lucrative work might be right around the corner. Not to mention a commission!

A Great Sales Tool Your team has come a long way to get to this point and a lot of energy and time has been spent to get here. A well-assembled proposal will be one of your best tools to sell your services. So now is the time to shine with an awesome **Killer Proposal**.

Estimate versus Proposal While you may have completed a time consuming and excellent estimate it's important to understand there's a big difference between an estimate and a proposal. An estimate provides a price quote and statement of work. A proposal provides a summary of the client's problems/points of pain and how you'll help solve them. An estimate keeps the client focused on the **price**; a proposal (even though it includes price) keeps the client focused on the **value** they'll receive. And that's why it is so critical to have a **Killer Proposal**. While there are many positive reasons to have **Killer Proposals**, the primary purpose is simple. **Killer Proposals get the client to focus on the value they'll receive not the price.**

Why do all of this? We are often asked why should I go through all of this time and energy when I will be only getting 15% to 25% of these approved anyway? And we usually answer with, look at everything that was needed to arrive at this point and why would you cut it off short now when you have come this far? NOW is the time to "**kill it and sign it**" with a **Killer Proposal**. In most small firms, sales proposals are the heart and soul of selling. Proposals are also time consuming, so when you get the opportunity to write one, you want it to be a winner.

Writing an outstanding proposal won't guarantee sales. You still need to follow up, court your client, and close the deal. But in this market, submitting a poorly written proposal will guarantee that you lose the business.

In these lessons we will review ways to make your proposals into **Killer Proposals**

The Key Takeaways Include:

Understand the importance of the proposal process to getting the sale

How to build a proposal that will have the client consider value vs. price

Ways to better differentiate you from your competition with a powerful **Killer Proposal**

Learn to avoid the most common mistakes made with most proposals

Expected Outcomes

Improved close ratios on proposals submitted

On jobs that are not awarded with these proposals, they will lead to other opportunities

Ask Yourselfs

- How do your proposals stack up?
- Have you stepped up your proposal process recently?
- How do you measure your success with your proposals?
- Do you currently measure your close ratios of proposals?
- If so, what is your current close ratio on proposals submitted?
- What would you like to have your close ratio be? In what period of time?
- If you are not currently measuring this metric how will you start measuring and tracking?

Lesson 1: Why Proposals are so Important

Shows Competence When you can clearly demonstrate your level of competence this will build the customer's confidence in you delivering your services for them. A Killer Proposal will show your level of competence in such a positive and professional manner that the customer will firmly believe in you and your company's ability to deliver.

Demonstrates your ability to listen and cater to the customer's needs Listening to your customers and understanding their needs and points of pain is a critical part of the proposal process. When your proposal clearly demonstrates that you were paying attention and you actually catered your proposal from their perspective and dealt specifically with their needs this will play BIG in their decision making process.

Used as a Sales Tool for your Customer Advocate Unfortunately you don't always get direct personal access with the owner or top decision maker so an awesome Killer Proposal will now serve as your best sales tool to show off to the decision maker. The Killer Proposal now will serve as your advocate's tool to help promote you and your company.

Differentiates you from your competitor Most of your competition will deliver standard types of proposals because they are either too lazy, don't believe the proposal makes much of a difference or don't have the time, resources and skills to build a Killer Proposal. Their focus will be on them and not the customer, the proposal will be similar to the rest of the pack submitting their "bids" and hoping for the best. Their mistake and the advantage go to you because you have now shown your potential customer you are definitely different from the rest of the pack.

Ask Yourself

- How much emphasis do you put on your proposal process?
- How do your proposals compare to your best competition's proposals?
- What ways do you believe a well-done proposal will help you get sales?

Lesson 2: The Proposal Process

We've screened and qualified the potential customer, we are moving to the estimate step and we will need to gather more information to assemble our proposal. So now let's move to the next steps of the proposal process.

Here are some basic steps required in the proposal process. Keep in mind it requires an average of five sales "touches" either in person or via telephone and other means of communication to consummate a deal. So we are getting pretty close when we have arrived to the proposal stage.

Key Steps to Get to the Sale

Prospect - Qualify - Job Review - **Meet Client** - Estimate - **Propose** - Present - Sign

Meet with the Customer: Listen, Look, Learn, Listen Some More

Do expectations meet specifications? Begin the process and begin the relationship. Review the job hopefully along with the customer and on the job site with a walkthrough to get clarity on expectations. Review their specifications and learn and understand what expectations they have. Do they match up? If not, re-clarify the expectations where their expectations do not match up with specifications.

What are Their Pains? Try to identify 3-5 pains; listen carefully and with detail. Identify 3-5 things that would make their jobs better and easier. How can your services help make their customers love them? Know their pains not only with the landscape but also with any related areas like: parking lot sweeping, heating and air conditioning systems, security, safety, hardscape issues, building maintenance, budgets etc. Listen and learn their pains and what needs to be done to solve their problems. Determine their main motivation for going out to proposal.

Learn About Their Company and Business Know and understand their business and where it stands. Learn about their company. Is it a new up and coming business or older and established? Learn their goals; their customer's issues, their competition; their culture, their language and vernacular. When is their fiscal year? Learn and know their decision making process and how your proposal can help them to help sell you and your company.

Go Deep if the Opportunity Arises Listen and learn about them and see if you have any common ground or interests and if you can build a personal relationship. See if you can find out who else will be submitting a proposal. If possible try to learn their budget and their fiscal year for their business.

Here's where it again pays to develop a good relationship with your potential client. Ask the client what range they're willing to pay; if it's too low, you'll know not to waste your time writing a proposal; if it's too high (a problem we'd all like to have), this is your cue to present a sound proposal as quickly as possible (before the client talks with one of your competitors!)

Build Your Proposal Game Plan

Ok you now have met with the customer hopefully on the job site and one on one. You are now quite familiar with the customer's needs and pains and have reviewed the job site to gain good familiarity. Let's move to the next step with building a Killer Proposal and that's to build your proposal game plan.

Consider the following when building your proposal game plan.

- When is the proposal due? How does this fit into your and your team's schedule?
- Consider how much time it will take to put a proposal together
- Allocate enough time to put a Killer Proposal together
- What resources both internal and external will be needed?
- Meet and decide action steps and who will be involved and establish timeframes
- Do some research on their organization, check out their website or company brochures, employee handbooks etc. Learn their culture and their language.
- When to deliver, check back, ask for permission, get feedback, reload or readjust
- Build proposal- rehearse prior to presentation- deliver proposal - review- anticipate questions - trial close
- Show how you will solve their pain and the results they should expect, get creative here maybe some other similar case studies.
- How specifically will you make their jobs easier and make them look good to their customers and their bosses?
- Check in with customer with preliminary proposal areas; get affirmation, input
- Often they will fall in love with you but there will be some renegotiating or scope of work adjustment. So if and when needed, be prepared to redo or adjust the proposal, deliver it, get agreement and sign the job.

Decide on Complexity and Strategy

What level of proposal will be needed? Short, Full or Deluxe Version?

Short Version: Proposal dealing with owner and decision maker and it's pretty much a deal and this is only a formality.

Full Version: They will be using it for possibly selling you to someone else like a committee or a remote owner and there is plenty of competition.

Deluxe Version: All out no holds barred proposal, possible videos, tour of jobs and facility, meeting with existing customers, PowerPoint, story boards, delivered remotely with Skype or GoToMeeting.

Ask Yourselfs

Do you have a proposal process? What is it? How is that working?

Do you have a list of great questions to ask your potential customer that gets the right info to prepare a Killer Proposal?

Do you have multiple levels of proposals as part of your sales arsenal?

Are your proposals “cookie cutter” or do you customize them to the customers needs?

Lesson 3: Proposal Etiquette and Protocol

Get the Proposal to the Client Quickly

Determine due date, time and how official do they want the format, sealed envelope etc. Be timely and responsive. This is one case where the old saying, "strike whilst the iron is hot," really holds true. For small jobs 1-2 days, Medium size jobs 3-5 days, larger more complex jobs 5-10 days.

In today’s world people like just dealing with the numbers and want to install them in an excel spread sheet; it’s usually best to deliver the way they want it delivered, per their format. Note this should serve as a possible warning that you are “estimating vs. proposing” and you should really ask yourselves how you got to this point.

Note: If the due date is not possible then at least try for an agreed upon date that makes sense. Being in a huge hurry should serve as a warning signal they are shopping and not necessarily looking to make a change or perhaps they already have made their mind and just need several proposals to complete their internal process. If they really want a thorough proposal they will be patient and reasonable with their time frame expectations.

Learn Their Process.

Does the proposal go to committee, the owner, or are you dealing with the decision maker. Will you have the opportunity to present your proposal?

Go Face-to-Face

Try like the dickens to get a face to face to deliver and review the proposal. If you don’t get to meet with the decision maker this makes it even more important that the proposal is a **Killer Proposal**.

Let your personality shine through Try very, very hard to deliver and review your proposal face-to-face with your potential customer. This helps to give clients a sense of your company’s personality, passion, your culture and its style of working. This helps clients answer the all-important question: What will it be like to work with these contractors/service providers?

Be Prepared for Proposal Presentation and Review

Who will be attending? What are their roles? You should know these folks; know them very well if at all possible.

What time allocation has there been made for the proposal review?

Bring enough proposals for the key people in attendance

Always propose the best option first; consider having possible options

Be prepared to adjust the proposal after the presentation and get it back in their hands while they are HOT and NOW!

Get feedback; try to get some feedback to make certain you have covered everything they were looking for

Agreement / Contract Forms

If you are using your agreement form you should sign your portion before them and have on the presented agreement. This shows good faith and professionalism that you are “all in” and ready to go. If you are required to use their form make certain with your attorney on the contract wording and you will need to make sure the scope of work agrees with what you have estimated and proposed.

Don't forget to follow up

Don't wait until your prospect contacts you. Be clear in your proposal when you are going to follow up on the proposal (for example: “I'll call you on Friday to follow up on the proposal.”) Set a reminder, so you aren't going to forget it.

Ask Yourselfes

What is your proposal protocol? Is it spelled out and followed?

How long on average does it take you to turn around a proposal? For a small job, medium sized or larger project?

Can and should you consider better ways to get out sooner?

Lesson 4: The Proposal Basics

Use high-quality materials

Presentation folders or bound: determine the best. Consider the quality of paper and match the paper quality throughout the proposal. Get a binding machine or set up at Kinkos, Office Depot or Staples

Sweat every detail

Watch for typos, spell your customers name correctly and the titles right, and make sure that the right people receive the proposal on time Spell-check, then spell-check again. Misspelling a prospect's name is just plain lazy and really should not happen.

Keep the proposal short.

Keep your proposals as short as possible, while meeting the client's request. Think quality, not quantity. In general, the shorter the proposal, the better, proposals that are less than 5 pages in length are 31% more likely to win business than ones longer than that. The executive summary should not be more than a single page, and the rest of the contents should just provide support.

Limit paragraph length

Lengthy paragraphs, with more than 10 lines, appear text-heavy to the reader. You should generally limit paragraphs to 10 lines.

Use 10-point to 12-point font size

Fonts that are smaller than 10 points or larger than 12 points cause the reader to wonder why you chose that particular font size. Stay within the range of 10 to 12 points unless directed otherwise by the customer. Use the same font throughout all of your marketing pieces including website, business cards and proposals.

Use titles or headings and page numbers.

Many proposal evaluators skim proposals. Use proposal section headings that are informative, yet easily scanned. These headings can also work as theme statements to support your solution. This is critical if you are submitting a lengthy proposal. Headings make it easy for your prospect to locate key information and make your proposal easier to read by breaking up the page. Use page numbers to quickly get to the desired location. Some cases on larger ones use dividers with labels

Use visuals and graphics

Winning proposals tell a story and provide proof that your solution is the best one. Graphics add an element of credibility for the evaluator. Effective proposal graphics can include lists, charts, graphs, photographs, diagrams, and sketches. All graphics and visuals should include a descriptive caption to support the message. Use the 10-second rule for visuals — the reader should be able to understand the message in 10 seconds or less.

Use white space and emphasis techniques

Heavy, dense text is difficult to read and tires the reader. Leave white space in your proposal between paragraphs, lists, and sections. Use bold text for strong emphasis rather than use underlined or italicized text, which has a softer emphasis.

Create a style sheet for your proposals

Creating and following a proposal style sheet can provide consistency in the appearance of your organization's proposals. Using a style sheet can make developing proposals easier and quicker. A style sheet helps promote consistency in font size, page layout, body text, and graphics, and it can also help you be more customer focused and responsive.

Use Simple Words

While proposals aren't high literature, this doesn't exempt them from the laws of good writing. If you strive to be as clear and concise as possible, take an active rather than passive voice, and use simple language, you'll make your potential client's job easier and less aggravating — both factors that will help push your proposal to the top of the pile. A well-written proposal (backed up with strong graphical examples) is more likely to sell than a poorly written one.

More Basics

- Don't get all *abbreviated* on the client. The average prospect doesn't know what half the abbreviations we use mean, and we shouldn't expect them to, either.
- If you lack any design skills, ask a colleague or another design professional to give the document some sparkle, and then use this as a template.
- A polished document is clearly marked with headings, sub-headings, and block quotes (if required).
- While you shouldn't stamp out proposals with a cookie-cutter, you can and should reuse successful ingredients as much as possible.

Establish “boiler plate” formats that can become semi customized

Have a “boiler plate” or semi custom format and have at least three versions. Build a basic format for three versions, short, full and deluxe. This way you will be able to assemble in short order and have consistency with your finished product. As you get better at these you can adjust the format and keep tuning up your proposal process.

Keep in mind

When you write a proposal, remember that you are creating the proposal for the readers, not yourself. Make it easy for them. Organize your proposal with customer focus and responsiveness in mind, and develop your message for ease of evaluation. Your proposal will be rated not just on what you say but also on how you say it.

Ask Yourselfs

What basics are you already using? Which ones have worked the best?

What basics will you be changing with your proposals?

Do you have a semi custom “boiler plate” format for all 3 versions? If not when will these be in place?

Lesson 5: Tips for Writing a Killer Proposal

If you want to close the sale, you need to create a written sales proposal that stands out. Creating a proposal that rises above the rest doesn't need to be painful or complicated. You can employ some basic techniques to create a Killer Proposal that will win you business. A great proposal can be decisive in winning a project, while a poor one can cause you to lose a project, even if everything else in the sales process has gone flawlessly.

Follow these tips to a write a killer proposal every time.

Proposals must be customer responsive Customers expect you to be responsive to the requirements that they have given you, whether those requirements were provided verbally or documented in a request for proposal (RFP). There are only two acceptable ways to organize your proposal: Organize it exactly as your customer requested, or organize it in the order that's most important to your customer. Organizing your proposal in any other way indicates a lack of responsiveness to your customer.

Write a proposal, not an estimate. There's a big difference. An estimate provides a price quote and statement of work. A proposal provides a summary of the client's problems and how you'll help solve them. An estimate keeps the client focused on the price; a proposal (even though it includes price) keeps the client focused on value they'll receive.

Focus on the Customer The secret of successful proposals is to focus on what the prospect wants to hear. They want solutions to their problems, benefits for their projects, and most of all, they want to be convinced that you understand what they need. Sixteen pages talking about yourself (especially at the beginning) is subconsciously stating that you believe you are far more important than their project! You should mention who you are and what you do, but *after* their project details, and one or two pages should suffice. Or perhaps make it a separate document entirely.

Create a powerful, but concise executive summary. Decision-makers start with and focus on the executive summary so create this section with that fact in mind. When

writing the executive summary, assume that the reader knows little or nothing about the proposed project.

Discuss THEIR situation first. One of the most effective ways to capture your prospect's attention is to discuss your understanding of their situation BEFORE you do anything else. Effective proposals always highlight the problem that the prospect is facing and the impact that problem has on their business. Do this on page one...not later in the proposal.

Quantify the results that the client can expect Clients buy results, not tools or methodologies. Before you dive into the details of how you'll execute the project, make sure that you clearly state the concrete end goals. Stating the goals of the project up-front will make it easier for your client to evaluate your proposal, and entice them to keep reading right through to the end. Take care to use clear, concise language, and clearly specify and quantify the deliverables and time frames.

Be generous with your ideas You may fear that revealing your ideas about how to solve a problem during the proposal process could result in clients taking those ideas and completing the project themselves or hand these off to their current service provider or their other friendly competitor. In some cases, that may happen. But you'll have more success if you don't hoard your ideas. Use them to show clients that your team thinks and approaches problems in creative and innovative ways.

Finish early Let your proposal sit for a day after you've completed the final draft, and then reread it completely before presenting it to the client. You're likely to come up with some new ideas that enhance your work, and you may find errors that you missed earlier.

Make the proposal viewable online. Allowing clients to view a proposal online shortens the sales cycle, thereby creating revenue more quickly. Surveys discovered that the average time to accept a hard-copy-only proposal was 29 days, compared with only 18 days for proposals provided online. What's more: Online proposals were 18% more likely to win the deal.

The Price is Right Though this may seem obvious, be sure to price your proposal realistically. This is a buyer's market for services, and it's essential to price your services in a way that reflects both their value and your competitiveness. You don't have to have the lowest price but you need to have the right price.

Grand Finale Conclude the proposal with a call to action. Don't just end it with a price for the job. State what the terms are, and make it easy for the prospect to action the starting process. For example: "Send this page back, signed and dated, and we can commence immediately" is far better than a dollar figure on the last line.

Ask Yourselfs

Which of these proposal "tips" are already in play at your organization?

Which of these tips will you be using for building your proposal process?

Who will make this happen and when?

Lesson 6: The “Short” Version Proposal

We suggest using the “short” version for those times when you are dealing directly with the decision maker and the “deal” is pretty much a “done” deal. The selling part of the process has really been completed and there is a verbal agreement made.

This version will provide the very basics and serve as more of a documentation of what was agreed upon and would include some or all of the following: summary letter with description of services, pricing, the key expectations, concerns and or priorities, a basic schedule, the start date, specifications, two agreement copies for signature one to keep for their records and one to return to you for your files, certificates of insurance etc. This version can be pretty vanilla and highly transactional and not relational if you allow it to be.

This version can be as short as a one-page letter format along with some backup material listed above. Put it inside a simple folder along with some brochures about the company and there you have it.

Note: This is what most contractors use as their primary proposal and we believe this is **NOT** representative of a **Killer Proposal**. If the job has not been sold yet and you are using this type of approach then you will pretty much look like 99% of the rest of the competition!

If you are looking for a simple variation to the industry standard then we suggest using a little “touch” with a great executive summary or project overview.

The “Short” Version Proposal Format Outline

On the first page create an executive summary as follows:

- Thank them for the opportunity
- List the problems the client faces, the priorities or goals to be achieved
- Add your recommended solutions
- Detail the specific (and ideally unique) benefits resulting from your solution.
- Finally, provide the overall price, followed by a concise statement of how to get the project started and the start date.

On subsequent pages or sections:

- Specifications outlining frequencies, expectations, chemical application timing etc.
- Work Schedule: Mow on Mondays, irrigation checks monthly etc.

- Agreement with a place for their signature (if it's on your agreement you have signed it already)
- Contact information: Their Account Manager, 24 hr. emergency number, office numbers, e-mail addresses
- Certificates of insurance: Workers Comp and Liability coverage listing them as additionally insured
- References and testimonials from other similar type or size projects

Ask Yourselfs

Is the “short” version your standard “go to” version?

How do you look compared to the competition?

What ways can you improve your “short” version to better differentiate yourselves from your competition?

Lesson 7: The “Full” Version or Killer Version

Our most recommended version, the “full” version: Assume that this version will be used as a tool for your customer contact (hopefully an advocate by now) to use as their sales promotion of you or for presentation to the decision makers. This version will serve many times as your tool for closing the sale. It can serve as your centerpiece for your presentation and the key differentiator from you and your competition. Consider this version as the “ticket” to get you to the next level and leaving most of the competition behind wondering why they didn't subscribe to The Harvest Way Online Academy!!

Successful “Full” Version proposals are Killer Proposals These Killer Proposals will have three key themes and they are:

- Customer focused
- Responsive
- Easy to evaluate

Killer Proposals must be Customer Focused

To ensure that your proposal is focused on the customer, follow these guidelines:

- Clearly cite the customer's buying vision for your solution.
- Address your customer's “pain points” and issues, and provide clear solutions for each.
- Cite your customer's name throughout the proposal more frequently than your name
- Mention your customer before you mention your organization in paragraphs
- Focus on customer benefits rather than your solution's features.
- Illustrate how your organization differs from and is better than the competition.

Note: Too many proposals focus on the person or company that is presenting the proposal rather than on the customer. Customers need to know that they have been heard and understood, and the proposal should reflect this understanding. Spend time researching the company you are pitching to, and thinking about what type of pitch will work best for them. Do your homework.

Killer Proposals are Responsive Customers expect you to be responsive to the requirements that they have given you, whether those requirements were provided verbally or documented in a request for proposal (RFP). There are only two acceptable ways to organize your proposal: Organize it exactly as your customer requested, or organize it in the order that's most important to your customer. Organizing your proposal in any other way indicates a lack of responsiveness to your customer.

Killer Proposals are Easy to Evaluate

Killer proposals very easy to read, simple with their words, headings and language. The key points of information are easily found and understood within 15 seconds.

The “Full” Version Killer Proposal Outline

The Proposal Cover or Folder Have the cover of the proposal either have a good photo of the job and/or their logo and name of the job predominantly on display on the cover. Have picture of job on front with customer logo. Your name is secondary.

There are basically five steps to the “Full” Version Killer Proposal

Step 1: Intro letter/ Executive Summary; one page

Confirm your interest in the project; use some flattery here

Thank them for the opportunity to submit the proposal; be humble

Include and overview of the process and why they are important to you; not too sappy

Step 2: About Them; one page

Include a review of their business

Identify and address their needs

Identify and address their top three to five challenges or points of pain or goals with their project

Step 3: Dealing with their “Pain Points”; one to three pages max

Provide how you plan on solving their problems and what they should expect

Provide dates, times, people

Reiterate your understanding of their requirements; make sure your solutions will help them, remember they want solutions to their problems- RESULTS

How are you going to make their jobs easier, look good to their customer and or boss?

Be creative here and differentiate yourselves without being over confident

Identify exactly how your prospect will benefit by implementing your solution. It can be helpful to use a series of bullet points with each point stating a separate value proposition.

Step 4: About You; one page

Brief overview of your company, your history, your awards, community involvement, association memberships- no more than one page here This should ensure them that you have the ability to make them happy. Avoid jargon, acronyms, and corporate marketing-speak.

Step 5: The Basics; one page

Summarize. Many decision makers will jump to the last page of your proposal and skip all the details. When you include a bullet-point summary of the services you will provide to your prospect, that person will still gain a sense of what you plan to do without reading the entire proposal.

Summarize the scope, detail the benefits, provide price and what it includes and doesn't include

They want to be convinced that you understand, listened to and can deliver on their needs and that you can solve their pains.

Include a call to action here as in start date or sign this and we can start within 30 days upon receipt of a signed agreement

Ask Yourselfes

Do you have "full" version proposal process in place?

What will need to be done to build a template for this type of proposal?

Who will be involved to build this template? When should this be completed?

Lesson 8: The “Deluxe” Proposal Version

Ok there will be those rare times when you will need to pull out the big guns and bring on the “Deluxe” Proposal Version. I have done many of these over the years and when they are done right there is NO doubt you have pulled out ALL the stops!! These will definitely have the customer blown away along with your competition. These require a significant effort and should be reserved for those absolutely premier and usually larger more complex projects or jobs that have huge strategic value.

Brainstorm. Use your creativity to come up with ideas far beyond the original scope of the project and present the ideas in the proposal. Even if your customer does not go ahead with it, they will be impressed that you’ve spent time and effort thinking about ways to better their project. I’ve even seen these types of proposals get future projects with the potential customer.

Be mindful of your client’s brand. If you can tailor your proposal to their brand image, your work will stand out against the rest. Showing the client that their brand is at the forefront of your mind will assure them that they are important to your company.

Remember It’s About Them Not You To make your proposal a winner, create a proposal that is customer-focused, responsive to the customer, and easy to read and evaluate. If your proposal clearly demonstrates your understanding of your customer's needs, you are on your way to making the sale.

Get Organized If a sales opportunity requires a complex proposal, you can include a table in the proposal that shows how and where in the proposal you respond to each of your customer's requirements. You can also include graphics to highlight key information in the proposal and make your proposal more pleasant to read. You may even need to outsource some of the areas needing outside experts.

Understand Your Target: The most important thing you can do with your proposal is demonstrate that you understand the prospect’s needs and wants. Much of the language describing the client can be paraphrased from its own Website, but always make sure that you have a clear understanding of what the customer wants and why.

Show Them You Will Deliver Give specific ways that you can and will most certainly deliver on solving their “pain”

GO BIG!

Here are some ideas you should consider for the “Deluxe” Proposal Version. Remember you can’t do all of these so choose wisely and use the best means possible to reach out to your customer’s needs and how you are competent in solving these issues. Know what will really impress upon them how much you are focused on them and not you.

Be Bold. Grab their attention any way you can! Open with attention-grabbing images, bold statements, or a call to action.

Emphasize the skills of those around you.

You've spent time carefully choosing the people you work with; let your customers know who they are and why they're special to your company. Add pictures, or fun facts about your team members to the proposal. Also share with them the other experts and consultants that you will have engaged with the project and how these skills, knowledge and experience will help achieve the client's goals.

Get ready for your close-up. Film a short video of yourself or your team at work. Give the client a real-life sense of your company and what you will provide for them. Explain to them how your company differs from the rest. What about filming some testimonials from your other customers?

Horticulture Provide a horticultural overview of the project with square footages, types and inventory of plants, health of the plants, trees etc. perform soil tests, tissue cultures, build seasonal color change out selections. Use landscape imaging showing existing conditions and what the improvements would look like. If horticulture and the plant side of the business is an area of interest then go DEEP on the horticulture side.

Video Tape Their Job Have you walking through the job and commenting on areas and challenges with the job along with your recommendations.

Use endorsements and testimonials. Testimonials are still one of the most effective sales weapons and you need to incorporate them into your proposals. Third-party endorsements offer credibility and often reduce the risk factor for the prospect. Whenever possible, use testimonials from companies similar to the prospect's; this will make them more relevant.

Close with a call to action. Many people close their proposals with something like, "If you require any additional information please feel free to contact me." Dull, boring and a waste of time! A more effective approach is to clearly state what you want the prospect to do next. By the way, the next steps should ALWAYS be discussed BEFORE you write your proposal. There is no one way of improving your proposals that is better than another but your final pitch should be clear, concise, informative, and visually appealing.

Ask Yourselfes

What has been the largest job you have proposed on? Did you land it? Why?

What was done to prepare for this larger more complex project? What resources were needed? How long did it take to prepare this proposal? Was it worth the extra effort?

What new innovative ways can you go "big" with your next "deluxe" version?

Lesson 9: Proposal Bloopers and How to Avoid Them

Here are just a few samples of where we have seen mistakes made or where we have actually committed some bloopers ourselves.

- Focusing entirely on you and not the client. We do this and we do that and I am the greatest landscaper East or West of the Mississippi.
- Not being on time for a Public Bid opening. Toast
- The Biggest Bloopers: names spelled wrong, grammar, most common punctuations
- Got in such a hurry to get in on the customer's last minute deadline we goofed up a few things like actually doing a solid estimate, went to "guestimate" mode
- Quoted price in the field when pressured, now the price is higher
- Misspelled words: form vs. from, there vs. their, exception vs. acception
- Quality of paper and material is inferior
- Over focus on methodology rather than results
- Not following their described process
- Cover page with address used for all pages: no blank sheets without letter head

Ask Yourselfes

What bloopers have you made with your proposals? What was learned?

What do you do when you have a blooper spotted as you walk into the presentation?

You see a misspelling or there is a coffee stain on one of the pages, what do you do?

Do you have a check and cross check process in place to avoid errors?

Summary

Ok we have covered quite a bit here on the subject of proposals. The proposal part of the sales process is CRITICAL and a great opportunity to shine and make a difference. Here are some key things to remember when preparing your proposals.

Great preparation leads to a great proposal

- Good preparation is key.
- Remember the proposal is NOT about you!
- Meet your prospect in person and get to know everything about them.
- Let your prospect talk 80% of the time about their problems/pains and goals.
- Try to get on the same level. Talk about topics you both are interested in.
- Give concrete solutions to the prospect's problems and why they need you.
- Be sure you've talked about everything including the budget.
- Remember the prospect could make their decision based on your initial meeting.

Write a personal and overwhelming introduction

- Don't add a standard introduction, but make it personal.
- Use some topics from your conversation; say you enjoyed talking about these
- Refer back to the prospect's problems in very short succinct terms
- Include the problems to be sure you understand their problems.
- Close your introduction by giving a short overview of the rest of the proposal.

Focus on solutions

- Give your solutions. Describe services that will solve the prospect's problems.
- Try to keep it short and relevant. Don't talk about problems, talk about solutions.
- Remember that solutions are what your prospect is looking for!
- Beside your solutions, give your unique value to the solution.
- What makes you unique compared to others?

Keep it simple

- Try to keep it simple while writing your proposal.
- Use easy to understand vocabulary and keep everything simple and short.
- Your prospect is busy too; they don't want an 8-page proposal with language they don't understand.

Don't forget to get them to act and follow up, follow up, follow up

- Have a call to action
- Don't wait until your prospect contacts you.
- Be clear in your proposal when you are going to follow up on the proposal (for example: "I'll call you on Friday to follow up on the proposal.")
- Set a reminder, so you aren't going to forget it.

Exercise

Ok now it's time to go to work! Let's take a look at what is currently being done for your proposal process.

Take out several of your past proposals and take a look at them and see how they look in comparison with what we have reviewed in this lesson.

How can you improve your current proposals? More focus on the client, using photos and their logos, folders and paper quality, font size, less wordy, identify the pain and solve the pain etc.

Do you think a multiple level option is a good option to have? If so how will you go about building a template for 3 levels? Short, Full and Deluxe Version

So here's your assignment.

Go back through this lesson and use the guiding principles we have covered and build the template for the short, full and deluxe version proposal.

When you have completed this assignment please forward copies to the Harvesters and we will be happy to give you some real constructive feedback!