**Lesson #7. Make Killer Proposals: Ed’s**

**Purpose of the Lesson**

The purpose of this lesson is to help understand the importance of how the proposal process

helps the client consider your value over price and differentiates you from the competition,

so you can gain the sale.

**Lesson Overview**

In this lesson we’re going to cover the proposal basics, the process and when appropriate, why it’s so important to create a killer proposal. We’re also going to talk about proposal etiquette or customary behaviors and proposal protocol or behaviors the client will expect in the process.

**Step 1**

**Why Proposals are so important**

Proposals are important because they can clearly demonstrate your level of competence

In delivering your services to them. By providing a “killer proposal”, you will show your prospective client your level of competence in such a positive and professional manner, that the customer will firmly believe in your and your company’s ability to deliver.

Killer proposals also clearly demonstrate that you were listening to the prospects pain points and

needs. This is critical because when the prospect believes you understand their problems and can solve them, they are more likely to want to work with you than your competitors even if in some cases your price may be higher.

Another reason we want to prepare killer proposals is we don’t always have access to the actual decision maker, so we will be judged by the proposal they have in their hand. The more complete the proposal the more trust they will have in your company.

Lastly, a killer proposal will differentiate you from the competition. Most companies feel they either don’t have time to create a special proposal, don’t know how to, they’re just too lazy or just don’t feel it makes a difference. But they are wrong! What an advantage you will have when all of the proposals they have from your competitors are just “plain vanilla” and your killer proposal will rise to rise right to the top.

**Step 2**

**The Proposal Process**

If at all possible meet with your potential client and listen, look, learn, ask questions and listen some more. Try and walk the property and get clarity on their expectations. Review the specifications provided and see if they match their expectations, if not re-clarify. Next, do all you can to identify their pains. Again, listen and ask. Think about what you could do to solve their problems. Determine their main motivation for going out for proposals.

In working to build your relationship with them don’t just talk about the landscape but instead work to learn about their company. Are they new in business or are they well established? See if you can learn what their vision is, their goals, customer issues, and even their competition. Also if possible talk about their decision making process and how your proposal can help them sell you and your company. As you talk to the manager or owner listen and learn about them and see if you have any common ground or interests so you can build a personal relationship. While doing this see if you can find out who else is submitting a proposal and if at all possible, what the budget is.

**Step 3**

**Build Your Proposal**

Now that you’ve met with your prospective client and hopefully walked their job site with them, you are familiar with their needs and pains and have a good idea how to move forward with your proposal. Let’s consider some of the items to consider in building your proposal.

1. What is the level of complexity needed to win over the client, for example,

all that’s needed is the **short version** because you’ve done business with this client in the past and the proposal is just a formality. Or, the **killer proposal** needs to be created because the property manager or architect needs to use it to sell to the decision maker or owner and there’s a lot of competition. Or, the **deluxe killer proposal** a no holds barred version, with possible videos, touring the jobs and facility and even meeting with existing customers. You could include PowerPoint slides and story boards. These could be delivered remotely with Skype or GoToMeeting if the decision makers are not close or if there are multiple decision makers.

1. When is the proposal due?
2. Does it fit into your teams schedule?
3. Consider how much time it will take to put the proposal together.
4. What resources both internal and external will be needed?
5. Meet and decide the action steps and who will be involved.
6. Do research on their organization, check out their website, company

brochure’s, try to learn their culture and language.

1. Begin to build their proposal by showing how you will help solve their pain

and give them the results they are looking for.

1. If you have examples of other companies you have worked with and solved

their problems, include these as case studies.

1. Show how you will make their job easier and make them look good to their

bosses and or their customers.

1. Check in with them on some of your ideas to get buy in, this will help you

adjust items if needed and help them want to work with you.

1. Review the proposal and your overall concepts and if possible try and get

affirmation from them on what you are proposing.

1. Ask for the opportunity to present your proposal and if they agree, be sure to

rehearse it well and have a trial close at the end.

Now that you have considered all of these items be sure to let your personality shine through and try very hard to deliver this proposal face-to-face so your prospect gets a sense of your company’s personality and passion. This helps answer the all-important question in the prospects mind, can I trust this person, this company?

**Step 4**

**Proposal Etiquette and Protocol**

In today’s fast paced world clients want information fast so don’t delay, prepare your proposal as fast as practical. Find out what their expectations are. If unrealistic then negotiate a more practical time frame. Just a warning, some prospects may be in a huge hurry and this may signal a warning that they are just looking for numbers and really have no intention of changing company’s. This is true especially if they don’t want to be reasonable in their timeframes.

As part of the process be sure to find out the due date and format they want and how formal they want to be. In some cases on large jobs they have set deadlines and you will be given a receipt when the proposal is delivered.

Another warning is if the company simply wants you to fill out numbers online on their web site. Now it’s pretty obvious they may not care about quality just the cheapest price, you may want to ask yourself, do I really want this type of job?

**Be prepared for formal presentations.**

If the prospect agrees to allow you a presentation here are some items to think about.

* Who will be attending?
* What are their roles or positions?
* How much time are they allowing for your presentation, make sure it’s realistic.
* Bring enough proposals for all the key people in attendance, maybe even one extra just in case.
* Consider possible options to the existing specifications, more than one is optimum.
* If after the presentation they want modification to your proposal get it done fast and back to them, “while the iron is hot”.

**After the presentation don’t forget to follow-up.**

Before you get permission from them as to when you will follow-up, don’t wait for them to contact you. For example, “I’ll call you on Friday to follow-up on the proposal” and set a reminder on your calendar so you don’t forget.

**Step 5**

**Some Proposal Basics**

* Use high quality materials, with high quality paper consistent through out the proposal.
* Consider binding the proposal with a great first page. If presenting a less formal proposal at least put it in a classy presentation folder.
* Sweat every detail. No typos, spell customers names and company names exactly right.
* Keep the proposal short but complete. Best to have an executive summary in the beginning and only one page with the contents then supporting the summary.
* Limit the paragraph length and consider using 11 point font size or so
* Use headings that introduce each topic and page numbers. The person evaluating our proposal will find it helpful if you use topic headings especially if you have a lengthy proposal. This makes it easier to navigate so key information can be found. Page numbers are also helpful, especially in a meeting, so everyone can find the information quickly.
* Use visuals and graphics to tell the story and provide proof that your solution is the best one. Effective proposals use graphics like lists, graphs, charts, photographs and sketches. All graphics should include a descriptive caption to support the message.
* Use white space so your pages don’t look crowded. Leave white space in your proposal between paragraphs, lists and sections. Use bold text for strong emphasis rather than using underlined or italicized text.
* Create a style sheet or model for all your proposals. This provides consistency in appearance for you and your organization. This would include font size, page layout, body text and graphics.
* Use simple words. Proposals should be an example of clear good writing. Take an active rather than passive voice. Use simple language. A well written proposal backed up with strong graphical examples, is more likely to sell than a poorly written one.

**More Basics**

* Don’t use abbreviations
* If you don’t have design skills ask a colleague or another professional to give your document some sparkle.
* A polished document is clearly marked with headings, sub-headings and block quotes.
* While you don’t want “cookie-cutter” proposals, you can and should reuse the successful ingredients as much as possible to save time.
* Create “boiler plate” formats that can be semi customized. Best to create three versions, short, full and deluxe. In this way you will have consistence with your finished product. As you get better and do more and more these can be adjusted and fine-tuned.

Keep in mind that when writing a proposal, you are creating it for your prospect not for you. Make it easy for them to read, navigate through and build trust in your organization.

**Step 6**

**Tips for writing killer proposals**

If you want to close the sale, you need to create a written sales proposal that stands out above the rest and it doesn’t need to be painful to create. If you just employ some basic techniques to create a Killer Proposal you will win the 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.

Let me give you some tips to make sure you are building a Killer Proposal every time.

* **Proposals must be customer responsive:**

Prospects 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. There are only two acceptable ways to organize your proposal; Organize it exactly as your prospect requested, or organize it in the order that’s most important to your prospect. If you organize your proposal in any other way may indicate a lack of responsiveness to your prospect.

* **Proposals are not estimates:**

There is a big difference between an estimate and a proposal. An estimate provides hours and materials used to build your price along with a statement of work, a proposal provides a summary of your prospects problems and how you’ll help solve them.

* **Focus on the Prospect:**

The secret of successful proposals is to focus on your prospect, their problems, benefits for their projects, and most of all, they want to be convinced you understand what they need. If you spend much of your proposal talking about you and your company subconsciously your prospect may feel that you are more important than their project and solving their problems. Of course, you want to prove to the prospect you have the credentials and experience to do their project but only after you talk about them. Some put the information about their company, etc. in a separate area at the end of the proposal.

* **It’s all about trust:**

Build trust by including a portion of your proposal talking your company history and the passion you have for doing the work you do. Include a certificate of insurance so they aren’t wondering about your coverages. Offer trade organizations you belong to, awards you have won, brief bio’s of your staff showing what great people you have and three or so testimonial letters from very happy clients.

This will all help build credibility and trust with you and your company. Best to put this at the end of your proposal, perhaps in a separate section.

* **Create a powerful but concise executive summary:**

Decision makers start with and focus on the executive summary so create this section with this in mind. When you write the summary assume that the reader knows little or nothing about the proposed project.

**Quantify the results that you client can expect:**

* Clients want results so before you dive into the details of you’ll execute the project, make sure you clearly state your end goal. State the goals up front and entice them to keep reading right through to the end. 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 with another contractor. This may happen but not likely. Most of the time your prospect will respect you for sharing your ideas and the innovative ideas you have shared.

* **Finish early and sleep on it:**

Let a proposal sit a day, if possible, during this time you may come up with further ideas to include.

* **Make your proposal viewable online:**

Once you provide the proposal in hard copy offer to give your prospect the entire proposal online, in this way they can share it among their team and this leads to a quicker decision.

* **Is the price right?**

This may seem obvious but be sure your proposal reflects value and competitiveness, of course this depends on the market conditions. Remember you don’t always have to have the lowest price but you do need to have the right price. How do you know what that is? This will take trial and error and providing a number of proposals to find out.

**Step 7**

**Proposal bloopers and how to avoid them**

* Focusing the proposal on you and not the client.
* Not being on time for a public bid.
* Misspelled words, bad grammar or incorrect punctuations.
* Making mistakes because of being in a hurry.
* Quoting a price when pressured without sufficient thought.
* Using inferior paper.
* Over focus on methodology rather than results.
* Not following your model for killer proposals.
* Cover page with company logo used for all the pages.

**Summary**

We’ve covered quite a bit of detailed information on the subject of proposals. This is a critical part of the sales process and often neglected. A great proposal can make all the difference and even if your prospect doesn’t tell you, they will be impressed. Let’s review some of the key things to remember when preparing your proposal.

**Great preparation leads to a great proposal:**

* Good preparations is the key
* Remember the proposal is not about you
* Try to meet your prospect in person and get to know them, begin to build a relationship
* Let your prospect talk most of the time about their problems and pains, if they don’t talk

much ask them open ended questions.

* Talk about topics you are both interested in.
* Give concrete solutions to the prospects problems and why they need you.
* Make sure you talked about everything including the budget.
* Remember the prospect could pass judgement on you and make their decision based on your initial meeting.

**Write a personal and captivating introduction:**

* Try not to have a vanilla introduction, be unique and captivating if possible.
* Use some topics from your conversation.
* Refer back to your prospect’s problems in succinct terms.
* Close your introduction by giving a short overview of the rest of your proposal

**Focus on your solutions**

* Offer your solutions and describe services that will solve our prospect’s problems
* Keep it short and sweet. Talk about the solutions not the problems.
* Besides your solutions, give your unique value to the solutions.
* What makes you unique compared to others?

**Keep it simple**

* Try to keep your proposal simple and clear.
* Use easy to understand vocabulary.
* Your prospect is busy, they want you to get to the point in language they understand.
* Don’t forget to have a call to action at the end of your proposal.

**Don’t forget to follow-up.**

* Before leaving the meeting or if dealing through email or on the phone be sure to ask permission to call back. For example, “I’ll give you a ring back on Friday to check in”.
* Be sure to set a reminder to contact them, forgetting could cost you the job.
* When you speak or they reply by email be sure to again ask permission to contact them.
* Don’t appear anxious to them but let them know you want the job.

**Exercise**

Now it’s time to go to work. Let’s take a look at what you are currently doing.

1. Take out several of your past proposals and see how they look in comparison with what we have covered in this lesson.
2. How can you improve your current proposals? Are you focusing on your client, using photos, their logo, smart looking presentation folder with high quality paper, the correct font size, not too wordy, clearly identify their pains and provide great solutions?
3. Have you thought about possible options above and beyond what they have provided?
4. Do you have the correct length proposal, the short, full (killer) or the killer deluxe.

Go back through these lessons and use the guiding principles we have covered and build the short, full and deluxe various proposals.

When you have completed this assignment feel free to forward copies to The Harvesters because we would love to give you some real construction feedback.

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