



Banish Sales Proposal Drudgery

By Clive Miller

Using a bid proposal template to take the pain out of preparing sales proposals and bidding for contracts.

Some say it's better than sex. The high you get when your selling efforts land a juicy order is difficult to beat. Not far behind is the feeling you get immediately after a great meeting. Sometimes it lasts until you get around to thinking about writing the sales proposal.

I am sure that many sales people already have good writing skills. Perhaps you know how to write and can't wait to rush back and start writing a compelling justification whenever you are asked. A few at least, get pleasure from bringing words to life on paper. Why is it that people with a flare for interpersonal communication so often find writing a horrible experience?

If contemplation invokes even a faint sense of dread, we put it off until the last possible moment which usually means that the task must be rushed. If this seems an exaggeration, consider how many times you have submitted a late response or have had to seek deadline extensions.

In these days of work-smart workflow solutions, writing ought to be a less onerous task. Best practice advice for writing a winning document is to make it about the customer and solving their problems. Boilerplate paragraphs written to have universal appeal, fail to convey the understanding, credibility, and certainty of outcome that we need them to communicate.

If you have tried to create your own anthology of useful data, descriptions, paragraphs, and phrases you will know how difficult it is to keep such a collection of resources current and organised, in a usable manner. Let's consider the headings contained in bid proposal template.

First is the title. Copywriters tell us that this is the most important part of any document because it often determines if a potential reader will even begin reading. Supposedly, this is less important when a buyer is waiting with eager anticipation to spend hours pouring over each hopeful submission. A good title sets the tone. It is like a first impression. It can be bad, neutral, or good. Some otherwise strong propositions risk being discarded or read with disdain, just for want of a more thoughtful title.

When a sales proposal is to be read by several people, each with a different perspective such as that of senior executives, professional buyers or procurement managers, technical experts, financial executives, and users, the ideal is to write with each of these perspectives in mind. This is achieved by separating a proposal into suitable sections, titled to identify themselves as being written for people with the different perspectives.

Executive Summary

After a table of contents (with thoughtful titles), most professionals recommend beginning with the Executive summary, written for those who need a quick overview. The executive summary should:

- Express understanding of the circumstances and reasons for the requirement from the customer's perspective.
- Describe the issues addressed in the proposal or bid.
- Describe the solution with an appropriate level of detail.

- Explain why it will work and outline the supporting evidence.
- Summarise the outcomes and benefits.
- Summarise the costs.
- Propose the next step.

Large blocks of text are most likely to be skimmed.

A good executive summary should achieve all of this in six or seven short paragraphs. It takes more time to be brief rather than less so set aside enough time to do a thorough job. This may be the only part that the most senior, most influential people will read so it warrants full attention.

Technical Assessment

Some of the people reading a sales proposal will be evaluating the technical compliance of what is proposed. Best practice demands that proposal writers know the criteria for response assessment before writing a proposal. Those managing an RFP process that is subject to UK government procurement rules are required to provide evaluation criteria. For less formal responses, it is usually a matter of asking the question about evaluation criteria early enough in the buying process.

Technical assessors must determine to what extent a solution meets the required criteria. For some or all of the technical aspects of a solution, this might be as simple as compliant or not compliant. It is easy to exclude any or all responses that are not compliant with mandatory requirements defined by the buyer.

If you are bidding for contracts, participating in a formal RFP process, or responding to a government tender, much of the document will be governed by the specific responses required. As far as possible, responses should be given in the same order and with the same references as the request document.

Response to each element of the requirement should:

- Reproduce the appropriate bid or customer requirement statement.
- Acknowledge the understood intent or purpose.
- Explain how the proposed solution meets the requirement with an appropriate level of detail for the anticipated reader.
- Provide evidence as proof of compliance.
- Link the evidence or consequence back to the intent or purpose.

If you don't know how much detail they want, provide more than you think is necessary. Structure each individual response so that readers can choose how much they need to read. Improve readability by summarising, subdividing, and formatting.

User Requirements

Users are the people who have to get their job done using whatever is bought. When businesses buy anything that must be embraced or used by employees, they are wise to include representatives in their buying process. If what you are supplying requires users to do anything differently, it is wise to write a section of a proposal that specifically addresses likely user concerns:

- Reproduce appropriate bid or requirement statements that impact the users.
- Acknowledge the related working environment and typical user circumstances.
- Explain how the proposed solution meets the user need for functionality, usability, and efficiency.
- Provide evidence to support claims.
- Link the outcome back to the primary objectives, intent, or purpose of the proposal.

Financier Requirements

Without other guidance that may or may not be given in any formal RFP or tender, this section can appear lean because all that is left is declaring the price. By taking into account the needs of those with a financial perspective, a

proposal can provide a richer response:

- Detail the total capital and recurring costs.
- Detail appropriate delivery, installation, implementation, acceptance, and payment schedules.
- Acknowledge any agreed penalties regarding non compliance by either party.
- Link completion to the primary objective, intent, or purpose and if appropriate, use customer data to illustrate lead time to effectiveness, break even, and return on investment.
- Include any guarantees that extend legal rights.

Other sections that may require application of a similar structured approach might include supporters, approvers, and those with contract perspective. Supporters are any customer staff who will be involved in maintaining or supporting implementation and use.

Approvers are those who ensure that a firm's policies and procedures are observed. This might include purchasing or procurement staff. Those with a contract perspective might include contract managers and legal counsels.

Including a summary that expresses a firm recommendation and describes any steps entailed in acceptance, is a clean way to complete a sales proposal.

If you have engaged with a buyer over the full period of their investigation, then the content of the proposal should contain no surprises. Ideally you will already have obtained the buyers agreement that what you are proposing, completely meets their needs. This doesn't mean that you are guaranteed to win, only that you are a contender. If you haven't obtained this agreement, then you will be trying to guess the right solution. RFP and tender invitations are often written around a particular supplier's solution. If it isn't yours and there is no further opportunity to discuss the requirement you have

to make assumptions and accept the associated risks.

Gene Fowler said, "Writing is easy. All you do is stare at a blank sheet of paper until drops of blood form on your forehead."

If you need a way to increase writing quality and reduce preparation time, use these suggestions to create your own bid proposal template.

Having an easily accessible archive of successful past proposals is another easy step to take that will reduce the effort required to produce a winning proposal.

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About the Author

Achieving sales targets has been the focus of Clive's working life for twenty-five years. During his time in the field, he has sold a wide range of products, solutions, and services in the IT industry. He continues to sell SalesSense training and consulting services. In addition, he is the author of most SalesSense training material and writes about selling for magazines and newsletters.

From the launch of SalesSense in 1996, Clive has directed the company's growth. As a sales trainer and coach, he has helped hundreds of companies and thousands of people increase their sales success.

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