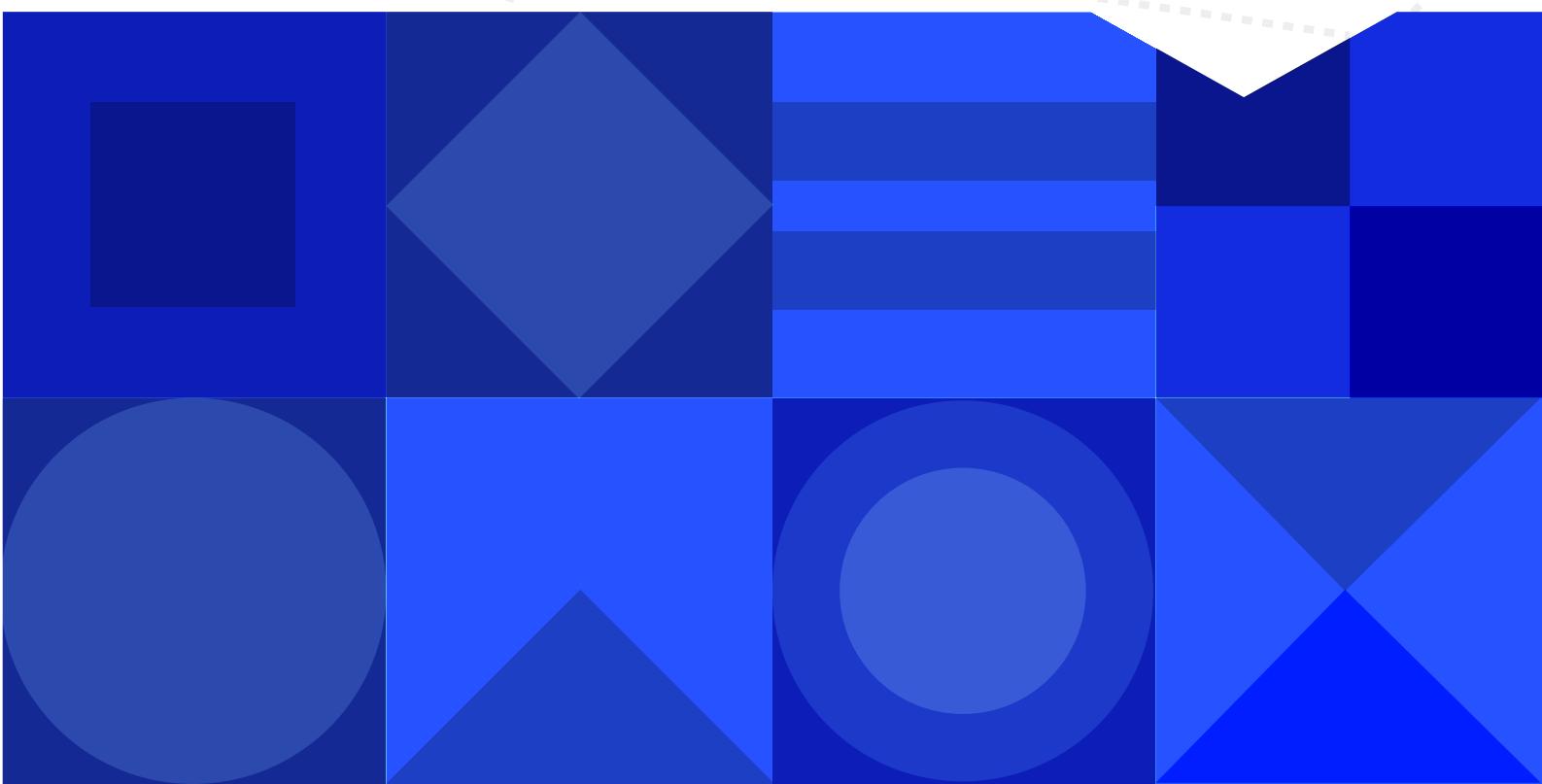
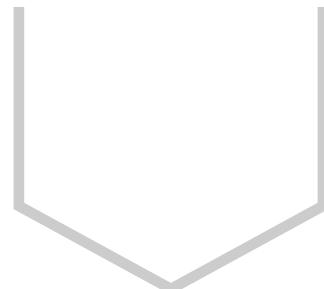


THE ULTIMATE GUIDE TO CREATING POWERFUL **SALES PROPOSALS** **THAT WIN**



SALES PROPOSAL

Love them or hate them, a well-crafted sales proposal can be the difference between winning a deal or losing it. While some providers see them as nothing more than fancy quotes that take too much time to create, sales proposals are one of the most powerful instruments in a salesperson's arsenal.

In this e-book, we'll explore the basics of crafting a winning proposal, from understanding your customer's needs to making a persuasive argument. It also touches on some common pitfalls to avoid and provide tips for ensuring your proposal stands out from the competition. So whether you're a seasoned pro or just starting out, this e-book is for you. Let's get started!

What is a Sales Proposal?

At its core, a sales proposal is a document that outlines the terms of a potential deal between a customer and a supplier. It is an offer from the supplier to provide goods or services to the customer in exchange for money. Sales proposals can be used in any industry, but they're particularly common in sales environments where deals are closed through negotiation.

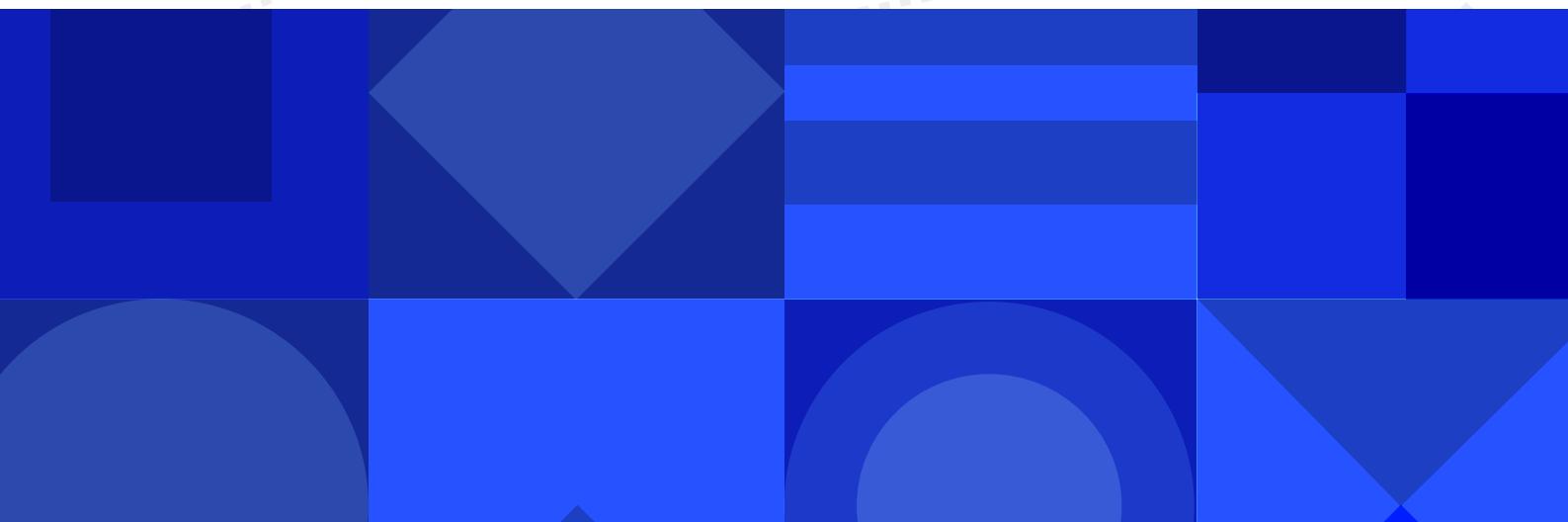
Why are Sales Proposals important?

Sales proposals are important because they enable suppliers to pitch their products or services to customers in a concise, well-organized manner. This makes it easier for customers to understand what's being offered, and gives them a point of reference to discuss the proposal with their colleagues or superiors. In addition, proposals can be used as a tool to measure progress during the sales process. For example, a supplier could use a proposal to track how many deals have been won or lost over time.

HOW DO I CREATE A WINNING SALES PROPOSAL?



There's no one-size-fits-all answer to this question, as the success of a sales proposal depends on many factors, including the industry, the product or service being offered, and the customer's needs. However, here are 50 tips that can help you craft a winning proposal.



01

INCLUDE A PERSONALIZED COVER LETTER

A personalized cover letter shows the customer that you've taken the time to understand their needs. Start by addressing the letter to the person who will make the decision to buy your product or service. Then, explain how you can solve their specific problem or meet their needs. Highlight any previous experience you have that's relevant to the deal, and remember to thank them for their time.

02

UNDERSTAND YOUR CUSTOMER'S NEEDS

Before creating a proposal, you need to understand the customer's wants and needs. This means do your homework and research about the customer's industry, competitors, and business goals. Also, ask a lot of questions and get to know the customer as well as possible. Only then will you be able to

03

USE COMPELLING IMAGERY

Poorly designed proposals can be a turn-off for customers, so use compelling imagery throughout your proposal. Choose images relevant to the deal that help explain your product or service. If you can, use infographics to make complex information easier to understand

04

INCLUDE AN ACTION PLAN

An action plan shows the customer how you can help them reach their goals. Explain what you'll do to address their specific needs, then outline a timeline for completing the work and include all of the steps involved in achieving the desired outcome.

05

USE A PROBLEM STATEMENT

A problem statement highlights the customer's needs and show how you can solve them. Start by outlining the specific problem the customer is facing, and then explain how your product or service can address that problem. Be sure to use clear, concise language that's easy to understand.

07

LIST RISKS, IF ANY

Just as you explain potential obstacles, list any risks associated with the deal. listing helps the customer understand the risks involved in working with you, and it might give them a chance to address any concerns they may have

06

EXPLAIN OBSTACLES, IF ANY

No proposal is perfect, so explaining any potential obstacles up front is essential. Explain why you think there could be a problem and what you'll do to mitigate those risks. If possible, offer a solution for each potential obstacle.

08

CONFIRMATION OF CLIENT'S GOALS

Confirm the customer's goals early in the proposal. This will help ensure that you're addressing their specific needs and that there's a mutual understanding of what's being proposed.

09

STATE THE EXPECTED OUTCOME

The goal of a sales proposal is to win the customer's business, so state the expected outcome upfront. Explain what you hope to achieve through the deal, and highlight how your product or service can help the customer reach their business goals.

11

MILESTONES AND REPORTING

To ensure the customer is getting the desired results, it's important to set milestones and report on progress regularly. Set goals for each milestone, and then outline how you'll measure progress and the steps you'll take if targets aren't met. Be sure to include a schedule for reporting on progress, and make sure that both you and the customer have access to the reports.

10

EXECUTIVE SUMMARY: EXPLAIN YOUR USP

The executive summary is a high-level overview of the proposal that should be easy to understand even for people who aren't familiar with the deal's specifics. Explain your company's unique selling proposition (USP), and then, outline the key benefits of your product or service. Finally, explain how you can meet the customer's needs and solve their problem.

12

DEFINE THE TIMELINES

Set clear timelines for the proposal and explain what will happen if they're not met. Outline the key milestones in the project and explain how much time you need for each one. Include a timeline for completing the entire project.

13

BE DETAIL-ORIENTED

No one wants to read a proposal that's filled with vague language and incomplete explanations. Be as detailed as possible in your submission, and explain every step of the process. If you're unsure about something, ask the customer for clarification.

14

KEEP IT SHORT

A long, drawn-out proposal can be a turn-off for customers. Keep your proposal short, and focus on the most critical points. If you need to provide more information, link to additional resources on your website or include it in an appendix.

15

KEEP IT SIMPLE

Simplicity is key when it comes to proposals. Use clear, concise language and avoid complex jargon. The customer should be able to understand your proposal without reading it twice.

16

EXPLAIN THE NEXT STEPS

After the proposal is accepted, explain the next steps. Let the customer know what will happen once they agree to the proposal, and outline a timeline for completing the work.

17

DEFINE THE MEASURES OF SUCCESS

Before the project begins, define what success will look like. These measures help you track progress and ensure the customer gets the desired results.

18

AVOID SPELLING AND GRAMMER MISTAKES

Just as you explain potential obstacles, list any risks associated with the deal. listing helps the customer understand the risks involved in working with you, and it might give them a chance to address any concerns they may have.

19

DON'T GENERALIZE

When you're writing a proposal, avoid generalizing. Be specific about the work you're proposing and how it will help the customer reach their goals.

20

CLEARLY MARK SIGNATURE AND PAYMENT DETAILS

To avoid confusion, clearly mark the signature and payment details in your proposal. This notation ensures no misunderstandings about who is responsible for what.

21

INCLUDE YOUR TERMS AND CONDITIONS

Include your terms and conditions in the proposal so the customer knows what to expect if they decide to work with you. The terms and conditions will also protect you if something goes wrong.

22

MAKE IT YOUR CONTRACT

If the customer agrees to your proposal, you can use it as a contract. Using the proposal as a contract saves you time and ensures both parties are clear about the work that needs to be done.

23

SUMMARIZE YOUR PROPOSAL

At the end of your proposal, summarize the main points. This summary helps the customer remember what you've proposed and makes it easier to agree to the terms.

24

REVIEW YOUR PROPOSAL MULTIPLE TIMES

Review your proposal multiple times to ensure it contains no mistakes. Ask a friend or colleague to proofread it for you, and make sure you have a clear understanding of what the proposal entails.

26

DON'T BE AFRAID TO USE VIDEOS

Videos can be a great way to explain complex concepts or proposals and increase engagement. If you have the resources, consider including a video in your proposal.

25

INCLUDE A NOTE OF THANKS

At the end of your proposal, include a note of thanks. Your appreciation shows the customer you value their time and effort.

27

USE PAGE BREAKS

Use page breaks to separate different sections of your proposal. They'll make it easier for the customer to read and understand it.

28

USE HEADINGS AND SUBHEADINGS

Headings and subheadings organize your proposal and make it easier to read. They also help the customer see the big picture and understand the different components of your proposal.

29

USE DIGITAL SIGNATURES

If you're using a digital proposal, consider using digital signatures. Digital signatures will help ensure that the proposal is legally binding and helps speed up the closing and funding processes.

30

BE READY TO RESPOND QUICKLY

To make the proposal process as smooth as possible, be ready to respond quickly to any customer questions. Your fast action shows them that you're dedicated to providing excellent customer service.

31

SAVE AND REUSE COMMON ELEMENTS

If you have a proposal template, save and reuse common elements. Reusing common elements saves you time and makes it easier to tailor proposals to the customer's needs.

32

TRACK, ANALYZE, AND ADJUST

Track, analyze, and adjust your proposal process as you go. Look at open rates, conversion rates, and other data to see what's working and what needs to be changed. Reviewing your process helps you improve your proposals and increase your chances of winning new business.

33

ENSURE THE PROPOSAL IS VIEWABLE ACROSS ALL DEVICES

Ensure your prospects can view the proposal on any device they choose. If the proposal doesn't display correctly, you risk making a poor first impression.

34

MAKE USE OF WHITE SPACE

White space can be a great way to make your proposal easier to read. It also makes it look more professional and helps to highlight important information.

35

USE FONTS THAT ARE EASY TO READ

Use fonts that are easy to read, such as Arial or Times New Roman. Avoid using fancy fonts, which can be difficult to read.

36

FOLLOWUP WITH THE CUSTOMER AFTER SENDING THE PROPOSAL

After sending the proposal, follow up with the customer to ensure they received it and answer any questions. Follow up helps ensure that the proposal process goes smoothly.

37

USE BULLETS AND NUMBERING

Bullets and numbering can be great to highlight important points in your proposal. They also make it easier for the customer to scan through the proposal quickly.

38

USE DIFFERENT TEMPLATES OR DESIGNS FOR VARIOUS CLIENTS

If you have different types of clients, use different templates or layouts for each one. Customizing your templates shows you are taking the time to personalize your proposals and are dedicated to providing an excellent customer experience.

39

INCLUDE ATTACHMENTS, IF NEEDED

Include any related attachments in your proposal. This detail helps the customer see all of the information you have available.

40

TRY TEMPLATES

If you're unsure how to start creating your proposal, try using a template. Templates give you a starting point and help to ensure that your proposal is formatted correctly.

41

USE A WELL-DESIGNED AND STRAIGHTFORWARD LAYOUT

Make sure your proposal layout is simple and easy to follow. Avoid using complex designs, which can be confusing.

42**USE YOUR BRAND
COLORS**

If you have a brand, use your brand colors in your proposal. Branding your proposal helps create a unified look and makes the proposal more professional.

43**USE A TABLE OF
CONTENTS**

A table of contents helps the customer find information quickly and easily. It also makes can also make the proposal look more organized.

44**USE AN EASILY
READABLE LAYOUT**

Your layout should be easy to read and should use an easily readable layout, fonts and colors that are easy on the eyes. Paying attention to these details helps the customer stay focused on the proposal.

45**INCLUDE AN
EXPIRATION DATE**

Set an expiration date for your proposal to help ensure it's viewed as a time-sensitive document

46

USE TESTIMONIALS

If you have testimonials from previous clients, include them in your proposal. That helps the customer see that you're experienced and capable of delivering on your promises.

47

USE CASE STUDIES

Case studies is a great way to back up your claims and show the customer you're capable of delivering on your promises. They also help the customer understand how your solutions might be a good fit for their business.

48

INTRODUCE YOUR TEAM

Introduce your team members in your proposal and explain their roles in the project. This extra touch helps the customer feel more comfortable working with you.

49

INCLUDE A CALL TO ACTION

A call to action is an essential part of any proposal. It tells the customer what you want them to do and helps ensure they take the next step in the process.

50

ASK FOR REFERRALS

After the proposal is accepted, ask the customer for referrals. Referrals help you generate more business and strengthen your relationship with the customer.

CREATE YOUR WINNING PROPOSAL

Creating a winning proposal can be a daunting task, but following these tips helps make the process easier. By putting in the time and effort, you can create a proposal that will impress your customers and help you win new business.

ABOUT US

Zomentum is the only intelligent Revenue Platform built to help Partners discover, sell, and manage services. Zomentum reduces the complexity of the sales process, eliminating numerous tools with one modern platform built to maximize revenue. So far, we've helped our customers generate close to \$500M in Channel revenue.

With Zomentum you can:



SOLVE

Discover SaaS Vendors with growing Channel Programs in our Marketplace



SELL

Accelerate deals and increase revenue with our Sales Acceleration Application



SIMPLIFY

Streamline billing, sync customer licensing data, and remedy lost revenue with our License Reconciliation Application

CONTACT US