

SMME Clinic Masterclass

How to Write & Present a SALES PROPOSAL

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LEARNING PROCESS

We learn most by 'doing'.

As long as we believe we 'can' and that we 'want' to try

INFORMATION = STIMULATION
+ INSPIRATION = EMOTION
+ INTERGRATION = APPLICATION

For each learning point ASK:

1. **HOW? (CREATIVITY)**
2. **WHY? (MOTIVATION)**
3. **WHEN? (COMMITMENT)**



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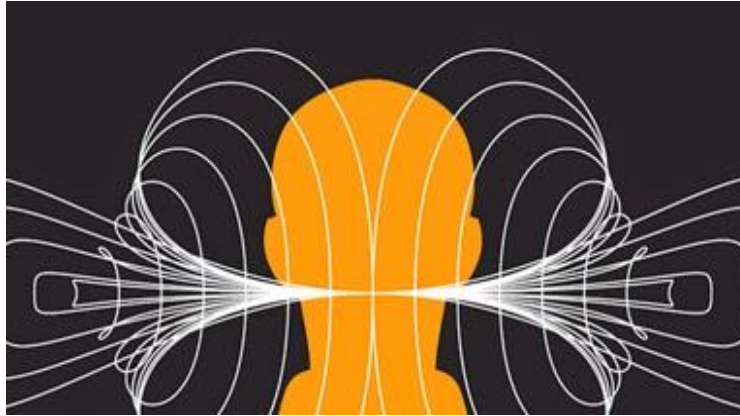


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Practical Business Remedies

How to Write & Present a Proposal



PLANNING

Sales Process
Value Positioning
RFQ v RFP

THE PROPOSAL

Your Understanding
The Proposal & Benefits
Road Map & Time Frames
Investment & Terms
Addendum: Credibility & Contact

THE PRESENTATION

Form, Expectations & Timeframe
Body Language
Inclusivity & Outcomes
WIIFM
Phrases, Coding & Brain Chemistry
Conclusion, Copies & Commitment
Next Steps

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PLANNING YOUR SALES PROCESS

THE SALES PROCESS = (i) Develop Trust (ii) Get Commitment (iii) Negotiate
YOUR SELLING PROCESS DEPENDS ON INDUSTRY BEST PRACTICES

EXAMPLE of a specific Selling Process:

1. 1st Meeting 1-2-1 – Discovery & Rapport development [TRUST]
2. Follow-up – Confirmation of Understanding + request for Discussion Proposal [TRUST]
3. 2nd Meeting 1-2-1 – Discussion of opportunity & agree Objectives [TRUST]
4. RFQ – Initial cost estimation (Budget considerations) + RFP [TRUST]
5. RFP - 1-2-1 presentation & request for presentation to interest groups [COMMITMENT]
6. Presentation to >1 attendees [TRUST & COMMITMENT]
7. Negotiation [NEGOTIATION]

PROPOSALS
Step 4

PROFESSIONALISM – KNOWING HOW TO RELATE KNOWLEDGE

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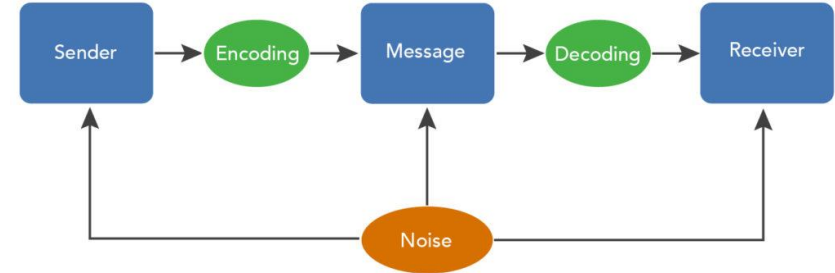
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PLANNING – VALUE

THEY BUY FOR THEIR OWN REASONS NOT YOURS



INTEREST GROUP

VALUE must show:

ROLE

1. TECHNICAL

Price, Terms, Specs & Stds

Gate Keeper : RFQ & Looks to say NO

2. USER

Impact / Productivity / Support

Saboteur : Must 'want' it (not need it)

3. FINANCIAL

Price Performance (NOT Price)
The Organisational Impact
Knowledge of business conditions
Predictive ability (avoid features)

Veto : RFP - Experience & Credibility

KEY
INFLUENCE

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PLANNING – RFQ v RFP

Do they only want a Price or are they open to Learning?

RFQ [Gatekeeper]

- Seeks Price comparison
- Doesn't want choice
- No relationship needed
- Gatekeeper control
- Quotation bids only
- Win – Lose tactics
- Bargaining only

RFP [Other Influencers]

- Seeks Value impact
- Wants best choice
- Trust relationship wanted
- Shared decisions
- Presentations favoured
- Fair Exchange negotiation
- Negotiating expected



Change the way they think about their business

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PROPOSAL STRUCTURE

1. UNDERSTANDING

Problem identification
The Challenges
Alternatives & Risks
Preferred Option & benefits

2. PROPOSAL

The Proposed Solution
Scope & Objectives
What Value Benefits will result
How it will be achieved

3. ROAD MAP

Timeframe
Deliverables
Programme & Schedule
Evaluation Criteria

4. INVESTMENT

Budget Price & Terms

Addendum: Credibility

SUBORDINATE YOURSELF
Credentials & References
Why they should use you

IT'S ABOUT
THEM
(NOT YOU)

BELIEF
&
MOTIVATION

PERSONALISE to
VALIDATE

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PRESENTATION

FORM, EXPECTATIONS & TIMEFRAME

FORM: Personal Presentation using PowerPoint slides

EXPECTATIONS & TIMEFRAME:

1. Introduction + Purpose & Objectives + End Game + Participation rules <10mins
2. Presentation <20mins
3. Questions <20mins
4. Commitment <5mins
5. Conclusion <5mins



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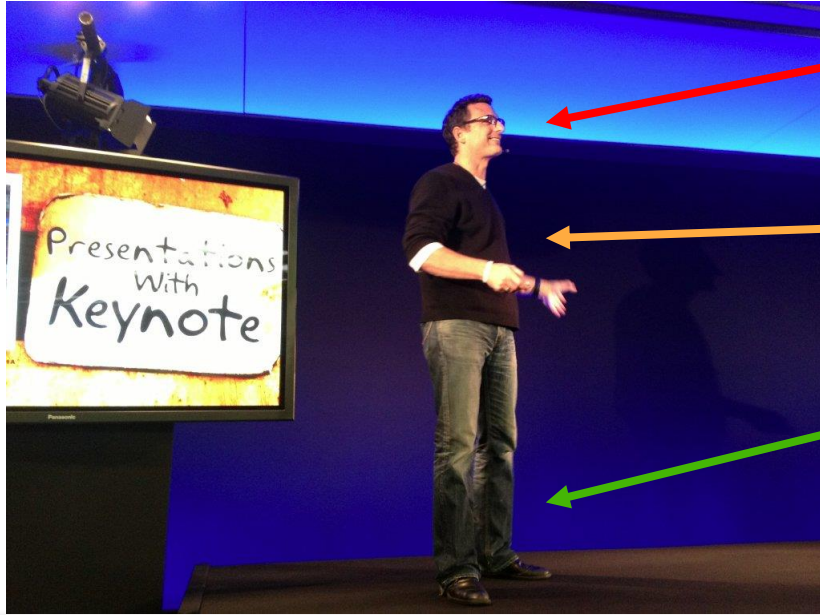


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PRESENTATION - BODY LANGUAGE

THE BODY ZONES convey the MEANING & FEELING

"It's not WHAT you say; it's HOW you say it "



1. **VISUAL:** (Deception Zone)
The Head & Face
2. **AUDITORY:** (Expression Zone)
Shoulders, Arms, Hands & Torso
3. **KINESTHETIC:** (Feelings Zone)
Hips, Legs, Feet & Movement

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PRESENTATION - BODY LANGUAGE

DRESS

- **RESPECT**
- **CARE**
- **CULTURE**



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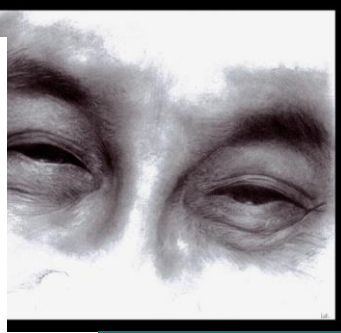
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PRESENTATION - BODY LANGUAGE

- ***SMILES & EYES***
- ***HANDS***
- ***FEET & MOBILITY***
- ***TEACHING***



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PRESENTATION – RAPPORT

Inclusivity & Outcomes

VALIDATION – Personal Welcomes
INFLUENCE LEVEL 1: Personal Connection WIIFM
OBJECTIVES 1: ‘At the end of this session....’
OBJECTIVES 2: ‘The solution proposed will result in....’



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PRESENTATION - TRUST
INCLUDE CONTENT INFLUENCING THEIR *FEELINGS*
THE QUESTIONS IN THEIR MIND ABOUT VALUE & RELEVANCE

BELIEF
I CAN

MOTIVATION
I WANT TO

PERSONAL	<i>WIIFM</i>	<i>WIIFM</i>
BUSINESS	<i>WIIF-B</i>	<i>WIIFM</i>
SOCIETY	<i>WIIFM</i>	<i>WIIFM</i>

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PRESENTATION - LANGUAGE PHRASES – CODING – BRAIN CHEMISTRY

WHEN LISTING BENEFITS:
“..... Which means that.....”

ASK QUESTIONS THAT HAVE
“YES” Answers

SEROTONIN & DOPAMINE
Assure EASY Solutions
Create WELCOME Expectations



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PRESENTATION - EXPECTATIONS **CONCLUSION** – **COPIES** - **COMMITMENT**

CONCLUSION = REVIEW & QUESTIONS

HANDOUTS = AS RELEVANT

COMMITMENT = PREPARE A SHORT EVALUATION QUESTIONNAIRE & INCLUDE
REQUEST FOR FOLLOW-UP CONTACT DETAILS & **NEXT STEPS**



Bridge their journey

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REVIEW: *10 KEY TAKE-OUTS*

1. **PROCESS:** *Your specific sales process*
2. **VALUE:** *Buying Influencers*
3. **RFQ v RFP:** *Selling advantages*
4. **PROPOSAL:** *Structure for THEM*
5. **PRESENTATION:** *Manage expectations*
6. **BODY LANGUAGE:** *Zones, Dress, Smiles, Eyes, Hands, Feet, Movement*
7. **WIIFM:** *Validation, Motivation, Belief*
8. **BENEFITS:** *Which means that.....*
9. **CHEMISTRY:** *Serotonin & Dopamine*
10. **CONCLUSION:** *Next Steps commitments*

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Thank You

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