



HOW TO WRITE WINNING PROPOSAL STRATEGIES



Table of contents

01	Show that you've done your homework	↗
02	Highlight your solution with great storytelling	↗
03	Use visuals to bolster your story	↗
04	Speak your prospect's language when making your case	↗
05	Make it a great differentiator	↗
06	Build trust	↗
07	Humanize your proposal with realism	↗
08	Steer would-be customers toward redlining in your favor	↗
09	Intimately know your buyer and go for the virtual close	↗
10	Offer multiple product or service options	↗

Far too many sales teams treat proposals as little more than glorified information packets. But any sales leader will tell you that — love them or loathe them — these strategic sales tools are one of the most powerful instruments in their arsenal of deal-closing weapons.

To wield them properly, you must approach writing sales proposals as both an art and a science. This balancing act is crucial. Proposals can cement a sale, lead to a larger-than-expected transaction, or even result in more business down the line. You don't want to get it wrong.

We asked 10 high-profile B2B sales leaders from companies like G2 Crowd and Sales Hacker how to get it right. Their insights into how to write a winning sales proposal come from years of experience (and trial and error). Each contains actionable strategies to give you a serious leg up on the competition.



Show that you've done your homework



Mary Wu

Head of sales operations [Adroll.com](https://adroll.com)



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Head of sales operations Adroll.com

Gather as much information about your prospect as you can. A well-written sales proposal should reflect that you have a great understanding of their goals and pain points. What does their roadmap look like? What is preventing them from hitting their goals? What (professionally) keeps them up at night? Gathering as much context as possible will lead to a sales proposal that speaks to the prospect.

The sales proposal is often the result of much back and forth with a prospect and should be treated as a natural step in a well-executed sales process.

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Therefore, i believe: it's important to hone in on the sales process to make sure the prospect experience is as smooth as possible from start to finish. This includes empowering sales reps with the right technologies and automation, from initial outreach through the signing of the contract and beyond.

Having the right infrastructure and tools in place will speed up the sales process significantly.

Highlight your solution with great story-telling



Josh Bean

Director of marketing Zendesk



Josh Bean

Director of marketing Zendesk

Writing a winning sales proposal comes down to clearly communicating that you understand the problem your prospect has encountered and demonstrating you have an effective solution. Customer stories are a great way to show how you've guided past prospects through similar challenges.



An effective sales proposal should tell a story. This means you begin by recognizing the problem your prospect is trying to solve. After you effectively show the prospect you understand the challenge, solving the problem becomes a team effort you and the prospect, and your product / service is the solution.

Avoid the feature-functionality trap and focus on the business problem at hand. Quantify the opportunity and present a business case to your prospect for why your solution makes sense.

Use visuals to bolster your story



Alli Mckee

CEO and founder Stick



Alli Mckee

CEO and founder Stick

Great sales proposals tell a visual story. Here is a simple formula to get you started:

Sales Story = Change + Pain + Gain + Proof.

First, describe the Change in the world that is bigger than your company to demonstrate why now. Next, show the Pain of today's situation with both quantitative cost and qualitative Customer Stories. Only then should you dive into the Gain your product offers and then provide the Proof that it works.

Customer Stories are critical to sales proposals because they help a prospect visualize the value you are offering. To build an effective Customer Story, you need three elements:

- What Outcome did the Customer achieve?
- What Action did the Customer take to achieve this?
- What product benefit made that action possible?

In terms of persuasion power, a well-crafted Customer Story beats feature lists every time.



Less is more. One of the biggest mistakes we see is the sheer volume of text in proposals. the reality is that most prospects aren't reading anymore they're skimming. design your proposals accordingly.



Speak your prospect's language when making your case



Sujan Patel

Co-founder Web Profits and Mailshake



Sujan Patel

Co-founder Web Profits and Mailshake

Tailor the case studies and use language that the prospect uses. For example, at Web Profits, people can use marketing, digital marketing, internet marketing, growth marketing, performance marketing, demand gen, etc., to describe what we do. At a high level, those words all mean the same thing, so use whatever the prospect refers to your service as.

If a prospect says the proposals they've reviewed are too generic, then your proposal needs to be much shorter and include specific details and timelines. Also, make sure your proposals can stand on their own to upper management or the decision maker. You want to make sure the proposal is CEO- or CFO-friendly, as those are the folks cutting the checks and ultimately the stakeholder.

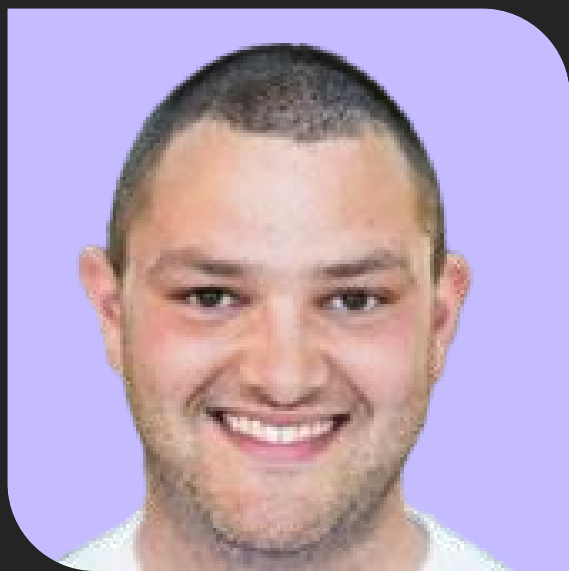


Do your homework on your competitors and the proposals your prospects are reviewing, and do the opposite of whatever everyone else is doing. When others zig, you need to zag.

But my best tip is to sell them before the proposal is sent. The proposal should just confirm what the prospect agreed to on a phone call, meeting, or email.



Make it a great differen- tiator



Luke Swanek

Co-founder Partnerstack



Luke Swanek

Co-founder Partnerstack

An effective sales proposal shows an intimate understanding of your customer's problems while placing a clear emphasis on the problems that you and only you can solve for.

Calling out your differentiation in proposals is particularly important when your prospect is also receiving proposals from large incumbents, who can typically solve for core requirements but little more

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Your proposal should reflect the unique pains that your customer is feeling support for your champion through product differentiation, while clearly showing that you meet the core requirements for the proposal to ensure executive signoff.



Build trust



Matt Gorniak

Co-founder and CRO G2 Crowd



Matt Gorniak

Co-founder and CRO G2 Crowd

Understand that it's yet another piece of content that informs the buyer of your brand and how you operate. So help them help you.

Clean separation between the commercial components and sales proof component. One section is an elegant presentation of the commercial terms, so the buyer can easily follow what it is they are purchasing. This helps build trust and accelerates the transaction because the buyer can get a sense of what they are getting and, just as importantly, can explain it to others.

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The second section is tailored proof points such as G2 crowd reviews, links to video reviews, case studies, and other trusted and valued content by the buyer. This helps them present the solution internally and offers other thirdparty validation points.

Humanize your proposal with realism



Todd Caponi

Author The Transparency Sale



Todd Caponi

Author The Transparency Sale

Are your proposals helping them accomplish the goals of predictability, risk reduction, and standing out? If every element of your proposal is glowing with promises of incredible ROI and a flawless experience, you're actually not helping much and definitely not standing out.

My perspective has always been to be a human being in your proposals. Stale canned language that paints everything as rainbows and cotton candy isn't believable, so it forces a buyer to do homework beyond your claims. It drives the buyer to search review websites like G2 Crowd and TrustRadius, do web searches, talk to peers at other companies, and even read through what employees (current and past) think on Glassdoor to provide insights into what you're really like.

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Transparency sells better than perfection. It's why a product on a website with a review score between 4.2-4.5 sells better than one that's a perfect 5. Be a human being, reveal your flaws, and i promise you your win rates will go up, your sales cycles will shrink, you will qualify deals faster, you will qualify deals out faster that you likely would lose anyway, and you'll make it incredibly hard on your competition.



Steer would-be customers toward redlining in your favor



Richard Harris

Director of sales training & consulting
services Sales Hacker



Richard Harris

Director of sales training & consulting services
Sales Hacker

I follow an A, B, C format where B is the one we want them to choose. A is too little and not enough and least expensive, C is too much and typically much more expensive. Each offer is laid out specifically on a single page showing the differences right next to each other.

Think of the "Compare" button when you look for TVs online at Best Buy, and you choose 3-4 to look at.

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Make sure you and your customer know the proposal and the contract for redlines are actually tied together, meaning if concessions are made on pricing, that could affect redline requests. Be sure you communicate this before you deliver the proposal. If you don't, you will get 'unbundled.



Intimately
know your
buyer and
go for the
virtual
close



Steli Efti

Chief Executive Officer Close.IO



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Chief Executive Officer Close.IO

Your real goal should be to gain a true understanding of the prospect that is so precise, you can then predict (in advance) where their sweet spot is, rather than running through every possible benefit and wearing them out.

So what's the best way to prepare before delivering a sales proposal? Ask your prospect questions! More specifically, strive to ask open-ended questions that can't be answered with a yes or no. Use these questions to map out the prospect's wants and needs. Then once you get to actually writing your sales proposal, there's no guesswork involved—you'll be pulling from real solutions to the exact challenges your prospect is telling you about.

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I see one element that's consistently left out of most sales proposals, and it drives me crazy. They don't go for the virtual close. after you've qualified a prospect, had a conversation with them, and put together a proposal, this should be one of the first questions you ask: “What will it take for you to become a customer?”

This is so crucial because, with this question, you're doing two very specific things: 1) getting a clear picture of the prospect's buying process, and 2) encouraging them to imagine a scenario in which they buy your product. Why is this so important? Well, how often are deals derailed by unexpected events?

Maybe a qualified prospect that sounds committed to buying says, "We need to run this by legal" or "Technically, procurement has the final sign-off." If you're caught off-guard by something like legal or procurement, then you didn't do your job. You didn't ask the right questions. And by the time you're sending over a proposal, you need to be asking for the close.

Offer multiple product or service options



Anand
Venkatraman

VP of Global Partnerships Freshworks



Anand Venkatraman

VP of Global Partnerships Freshworks

Remember that selling is about your prospect or customer, not about you. Always emphasize your understanding of the problems they want to solve and demonstrate how your solution is the best way to address those problems.

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Making the extra effort to connect your value to the prospective buyer's specific pain points is far more compelling than providing them with a laundry list of features that make your product or service great.

For the best possible results, propose three or four solutions at different price points (instead of a single one). By giving your prospective customer multiple options, they can weigh each offering at its own price level and better evaluate the value of your proposed solutions. This strategy not only lets you offer a range of prices (including one at a higher tier), it effectively makes you your own competition, which creates a win-win scenario for your company.

Closing your proposal and, ultimately, the sale

There you have it: Strategies for writing winning proposals from 10 sales leaders with track records of success.

Although each proposal must be unique to your prospect or customer, these proven best practices can be applied to any bid. Everything is on the line: A strongly written sales proposal can make a difference in losing or closing a sale, gaining a new client, landing repeat business, and establishing a long-term relationship with customers.

Whether you take Todd Caponi's rather radical advice of showing your human side (and a little imperfection) or adopt Anand Venkatraman's unconventional approach of acting as your own competition through multiple offers, your proposals will be stronger for it.

Heed the proven, effective advice of the leaders above to create a well-thought-out and executed proposal that increases your odds of a sale.



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and how we can help improve your sales
proposals, request a demo with a product
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