



eBook

# 7 deadly sins of proposal writing:

How to write proposals that help win deals

## Introduction

# Sales proposals are an integral part of complex sales processes.

A poorly executed proposal can undercut months of excellent sales efforts. Unfortunately, most sales trainings ignore them completely.

### **Seven Key Factors in Proposal Writing:**

- Qualify the opportunity
- Focus on what the client cares about
- Organize the message for maximum impact
- Differentiate your offer and your company
- Articulate a compelling value proposition
- Make the proposal clear and easy to use
- Remove all potential distractions and credibility killers

# The growing role of sales professionals

**Prospective customers are more likely to request proposals than ever before.**

Straightforward deals that previously would have been sealed with a handshake now often demand a detailed sales proposal.

There are several reasons for this: solutions in business-to-business environments are more complex, the buying process typically involves a committee rather than one individual, and customers must see a compelling argument based on value before they move forward.

Even simple services, like office cleaning, require a detailed analysis of the return on investment before a prospect will sign on the dotted line.

Unfortunately, many salespeople continue to tell themselves that proposals don't matter. They believe that if they have effectively sold their deals, a proposal is just another opportunity for clients to rubber-stamp what they have already decided. In fact, some popular sales training methodologies actually claim: "if you follow the method being taught, you will never need to write a proposal again."

The claim is blatantly false. A proposal is as much an integral part of the business-to-business sales process as a product demo.

While a great proposal is unlikely to win a deal on its own, a bad proposal can quickly derail an opportunity.



Sales professionals, their managers, and support teams all need to know what it takes to write winning proposals and what mistakes to avoid.

**Read on to learn the "Seven Deadly Sins of Proposal Writing," why they cause chaos, and how to avoid them.**

## The first deadly sin

# Failing to qualify the deal

The quickest way to improve your win rate is not to bid on things you cannot win.

That sounds obvious, yet salespeople spend thousands of hours every year writing proposals for so-called “opportunities” that they never had a chance of winning in the first place.

A frequent scenario for this kind of “opportunity” is when a request for proposal (RFP) shows up, unannounced, in a seller’s inbox. Most often, the seller has never spoken to the company soliciting the proposal, has no insight into their needs or issues, and does not know what kind of results they are looking for.

But it is an opportunity! Why not go for it? Because you probably won’t win. Statistically, you have one chance in 20 of winning in the first place. Put another way, you have a 95 percent certainty of losing! Hope is not a sales strategy.

Closing a complex deal entails careful use of limited resources, deep engagement, and strategic alignment of your solution with what the client needs. If you do not know what they need, how can you align your products or services effectively? If you have never spoken to them; how can you be deeply engaged with the client? And if you are responding to an RFP where you have no chance of winning, how can you believe that you are using your time and resources wisely? Before responding to that RFP, ask yourself four questions.

### 1. Do you know enough?

You must know something about an opportunity before you can qualify it. At a minimum, you need to be able to answer: What is their buying process? Who is the incumbent? Are they happy with the current provider? What are the business drivers behind this RFP? Why do they matter to the prospect? What results does the prospect hope to achieve? Which of the various results they want to achieve is most important?

Sales is knowledge work, and nowhere is this more obvious than the task of qualifying opportunities. The less you know, the less inclined you should be to pursue the opportunity.

### 2. Is the customer serious about making a choice?

Just because a business or government agency has issued an RFP does not mean they are serious about proceeding.

Maybe they are hoping someone will submit a bid with a crazy, low-ball price they can use to beat up their current vendor. Or maybe they just want to put on a show of doing due diligence, even though they already know who will get the contract.

Indications that the customer is serious include a compelling future event or date, having an acquisition team in place, and setting aside budget for the purchase.

### 3. Is your solution competitive?

Does it match their technical or contractual requirements? Does it fit with their management approach, schedule, or price?

This question is meant to help you discern what really matters to the client and what is of secondary importance.

### 4. Can you win?

What will it take to win this deal? Do you have a strong champion on the decision team? Can you offer a competitive price and still make a reasonable profit?

Can you offer a compelling value proposition, one that is strong enough to overcome the fact that you may not be the lowest priced vendor?



Don't create proposals for opportunities you have a

**95%**

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The second deadly sin

## Not focusing on what the customer cares about

**The most important part of any proposal is the executive summary because it creates that vital first impression.**

If the executive summary focuses on the vendor—on your company history, on your products, or even on how pleased you are to respond—the client’s initial impression will be negative. Self-centered content is never as appealing as content focused on the client. And yet, surprisingly, around 30 percent of all proposals start with a corporate overview or company history.

Instead, focus on what the customer cares about: the issues or problems they face, and the potential success achieved from addressing those issues or solving those problems. This is critical in the executive summary, but even the cover letter and title page should focus on content that matters to the decision maker.

Rather than titling the proposal “Proposal for Server Virtualization,” lead with the key outcome the client wants to achieve for the title: “Increasing Profitability and Throughput in the Data Center—A Recommendation for Server Virtualization.”

Research indicates that the first question buyers ask themselves when they are considering their options is, “Are we getting what we need?” This should be the first item addressed in your executive summary and cover letter.



The second question they ask is, “Is this the best way to spend our time and resources?” Focusing on the impact of solving their problems or meeting their needs is the second thing to highlight.

By covering the client’s needs and desired outcomes first, you show that you care about the same things they are concerned with. This lowers anxiety in the buying process and helps increase the customer’s trust in you. Starting with your company history or an overview of your products does the exact opposite.

## The third deadly sin

# Not structuring the document persuasively

The human brain is hardwired to look for specific kinds of content organized in a specific order. What the client looks for is determined by the intent of the message.

If their intent in reading or listening to a message is to acquire and understand facts, use an informative structure. It should begin with the main facts. As a sales professional, you want to help the customer make an informed decision that benefits both you and them.

### **Persuasion is the flip side of decision making.**

However, if their intention in reading a message is to make a decision, use a persuasive structure. Typically, customers read proposals to find what they need to decide quickly and confidently.

In this case, when you write a proposal, organize, and order your content to answer the key questions a prospect asks when they are trying to make a choice. And, of course, persuade them that you are the best choice.

The way to persuade a prospect that your solution is the best choice is to follow the four steps in The Persuasive Structure. The first two steps address the customer's needs and the probable outcomes of acting, followed by your solution and evidence:



### **The complete persuasive structure**

- Summarize your understanding of the customer's needs
- Indicate the probable outcomes from taking action that make this worth doing  
Organize the message for maximum impact
- Recommend a solution that addresses the needs and delivers the results
- Provide evidence that you can do the job on time and on budget and that there are reasons why you are the right choice

**These four steps are essential to delivering a persuasive message to build your business case or respond to RFP questions.**





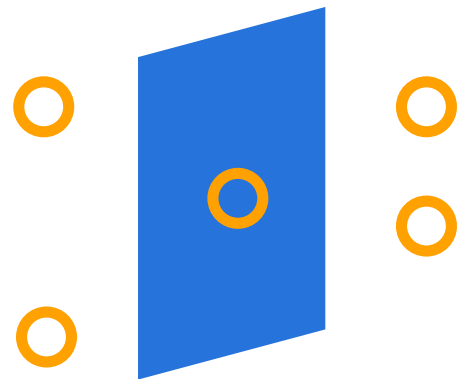
The fourth deadly sin

## Not differentiating your offer and your company

**The customer needs to see that there is a reason to choose you, based on something you do that is different and that adds value to the engagement.**

Without differentiators, the client will assume they are buying a commodity product or service and will look for the lowest price. The strongest, most impactful differentiators are related to the way you work: your methodology, your best practices, your systems, and your processes.

Also important is the way you manage projects: how you deal with the unexpected, keep projects on track, and avoid unpleasant surprises among multiple options.





## The fifth deadly sin

# Not offering a compelling value proposition

**A value proposition is a promise that you make to the client:** “You, the client, will get more of the results you desire the most if you choose us.”

Unfortunately, that promise is missing from most proposals.

Smart buyers want to see a positive impact in some area of business performance that they believe matters. They may want to see increased market share, lower operating costs, or higher profitability. They may want to automate something labor-intensive, achieve compliance with regulatory standards, or reduce their carbon footprint.

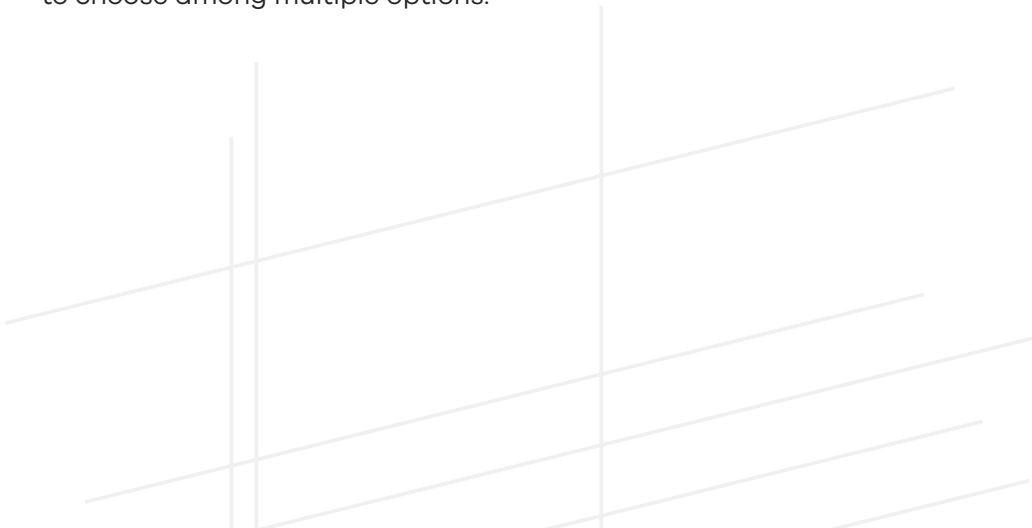
Whatever the client is looking for, you need to show that they will get more of it by choosing you because of the differentiators and added value you offer.

Tying your differentiators to your ability to deliver superior value is a terrific way to bulletproof your proposal against competitors.

Value matters. Research into economic decision-making shows that people use what is called the “estimation heuristic” to choose among multiple options.

People use their past experiences and judgement, rather than analytical formulas, to decide which vendor will give them the highest rate of return on their investment. In using this heuristic, your prospect will define which course of action—which vendor—will yield the highest rate of return.

Your goal is to give the customer the evidence they need to determine that your differentiators and solution provide superior value - so they see that you are the best choice.



## The sixth deadly sin

# Not making it easy to understand and use

**Clarity is one of the essentials of persuasive communication.** When people do not understand what you are talking about, they usually do not shove piles of money at you. When they are confused or unsure of what they are getting, they delay the decision. They ask for additional presentations. They simply need more input.

**Language that is inappropriate for their level of technical understanding confuses them.** Acronyms, jargon, and product names are the chief offenders. Using them tends to create barriers between you and your potential customer, raising the level of what psychologists call cognitive dissonance.

**Another problem is the use of long, complex sentences and big words.** Although people sometimes think that this kind of writing makes them sound intelligent, it just makes it difficult for prospects to understand. Long sentences and unfamiliar words overload the area of the brain called working memory, where people decode the language inputs they receive.

When working memory is overloaded, the process breaks down. Anyone who has had the experience of reading something difficult and confusing, only to stop in the middle, go back to the beginning, and start again, has experienced overload in working memory. When this happens to your customers, they tend to believe that what you are recommending is so complicated that it is not likely to be easy or even to work. As a result, they pull back from buying.



**The sixth sin also arises when proposals are poorly formatted.** Studies done by the Dartnell Institute found that most executives do not read the documents they receive. Instead, they skim them. The typical pattern of skimming is looking at the first page or two, turning to the last few pages to find any pricing or action steps, and then bouncing around the rest of the document, looking for key points. The lesson: make your key points jump off the page. Format for eye appeal, using headings, subheadings, and graphics. Use floating text boxes, sidebars, and graphics. Focus the customer's eye on what you want them to remember. Otherwise, they are likely to miss your key points completely.

## The seventh deadly sin

# Not editing carefully to remove mistakes and credibility killers

The final sin is probably the least serious of the seven, yet it can severely damage your chances of winning.

**This is the sin of carelessness:** not correcting the typos, misspellings, grammar mistakes, punctuation errors, and other credibility killers that inevitably litter a first draft.

The most serious of these errors is calling the client by the wrong name. The CEO of a direct marketing firm was distraught to discover that his proposal to a major software vendor for a three-year, \$10-million-a-year contract to communicate with the major software vendor's partner channel was totally derailed because he referred to them as a competitor's company name. Even though this was obviously a cut-and-paste error, it was one that his prospective client could not overlook. It was a \$30-million typo.

When you wait until the last minute to edit the document, you are less likely to see your own mistakes.

This is due to a psychological phenomenon known as the Gestalt principle of completion of form, where the brain overrules the input of your senses, so you do not see your own mistakes.

Instead, you see what you expect to see, not what is actually there. Because you know the proposal is written for the major software vendor, you cannot see their competitor's name right in front of you.

To overcome this problem, use pre-written text elements that have placeholders instead of client names. Also, be sure to build enough time into the process for thorough editing and review before publishing the final document.



Don't make a

# 30M

proposal typo



Upland Qvidian automates away the tedious and frustrating parts of your RFP response and proposal processes. With Qvidian, sales and proposal teams can collaborate effortlessly to quickly deliver polished and compliant proposals, presentations, and sales documents.

**Find out more about how Qvidian automates away the time-consuming parts of your proposal process so you can focus on closing deals.**

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