

Invigorating Our Sales Proposal Process

Evaluating Our Proposals	Questions To Discuss With Your Team	Steps To Improve?
Quality	Have we recently refreshed our sales proposal template to ensure it is current and accurate in what it conveys? Does our proposal document represent the quality of our brand?	
Value Proposition	Do our sales proposals effectively communicate the value we deliver to our customers?	
Unique Selling Proposition	Do our sales proposals effectively communicate how we are unique in delivering our product or service versus the competition?	
Understand Customer Need	Do we review each sales proposal to ensure it is addressing the customer need or is our proposal generic and missing specific areas our customer asked us to address?	
Competitive Review	How does our proposal compare to that the customer receives from competitors? Does our sales proposal help us stand apart from the competition?	
Proposal Quantity	Do our proposals contain too little or too much information for the customer? Too little means there are open questions the customer may get frustrated having to follow up to get clarity on. Too much information might be confusing.	
Timing of Submission	Do we submit our proposal to the customer in the timeframe they expect to receive it?	
Follow Through	Are we following up on all outstanding sales proposals in a timely fashion to ensure customer receipt? To ensure we have addressed the customer questions in our proposal?	
Refresh Terms & Conditions	Are the terms and conditions in our proposals current and accurate? Is there any conflicting language between our sales proposals, order acknowledgements or our invoices?	
Proposal Pricing	Does our pricing strategy reflect our market uniqueness and the value we deliver to our customers? How predictable is our pricing and might a competitor be exploiting this?	
Tracking	Do we effectively track Sales Proposal Turnaround Time, Follow Up, Win/Loss Rate?	