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How to Design Standout Proposals that Win



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P O L L Q U E S T I O N

What is your current role?

Today's Topics

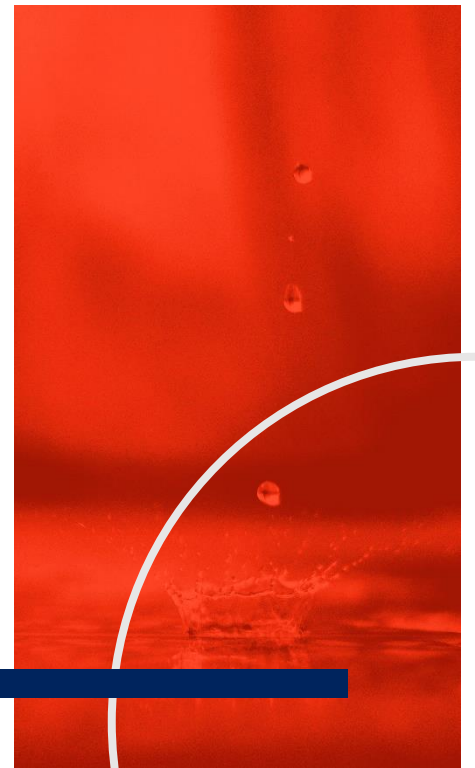
- The one thing every proposal should aim to accomplish
- A framework for shaping your proposal in any sales scenario
- Some “Don'ts” to avoid
- Strategies to improve your win rates

P O L L Q U E S T I O N

What is your biggest
challenge with proposals?

Let's Break Down a Proposal

- A proposal is a case for change and you are a change agent
- Positioning relevant outcomes and value from the customer's perspective
- It takes your intelligence about the customer, along with key relationships, and creates a path to success
- Opportunity to educate and help a customer to make their business better

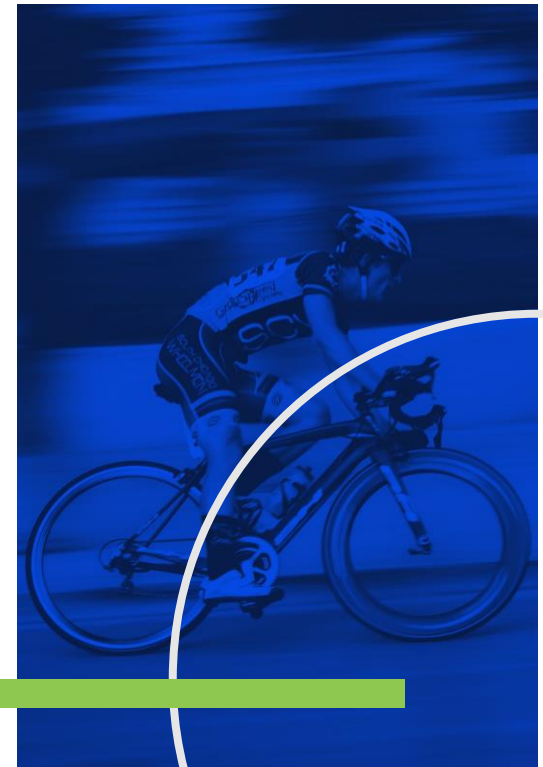


C O N V E R S A T I O N

Over 50% of proposals fail
to convert. Why?

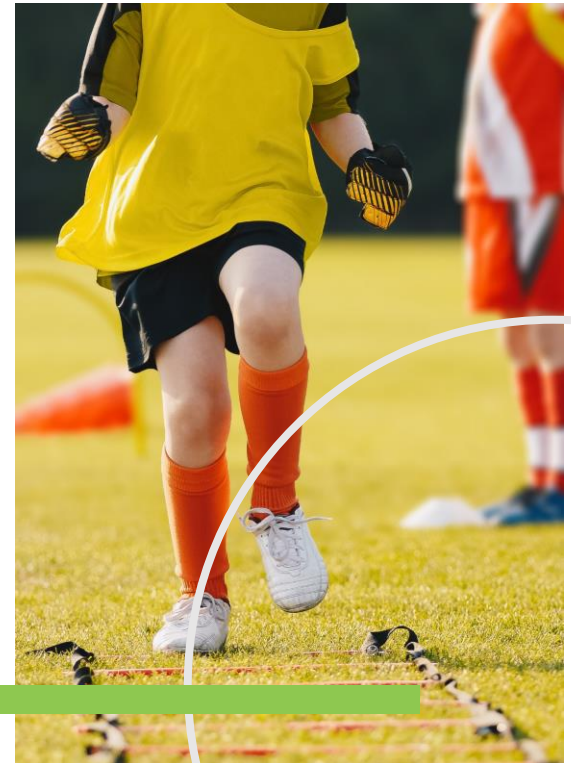
Why do most proposals fail?

- Take the logo off your proposal. Does it look like everyone else's?
- Often a resume of your company
- The “proposal equation” is off balance, resulting in irrelevance



What should your proposal accomplish?

- Create forward momentum
- Uneven the playing field



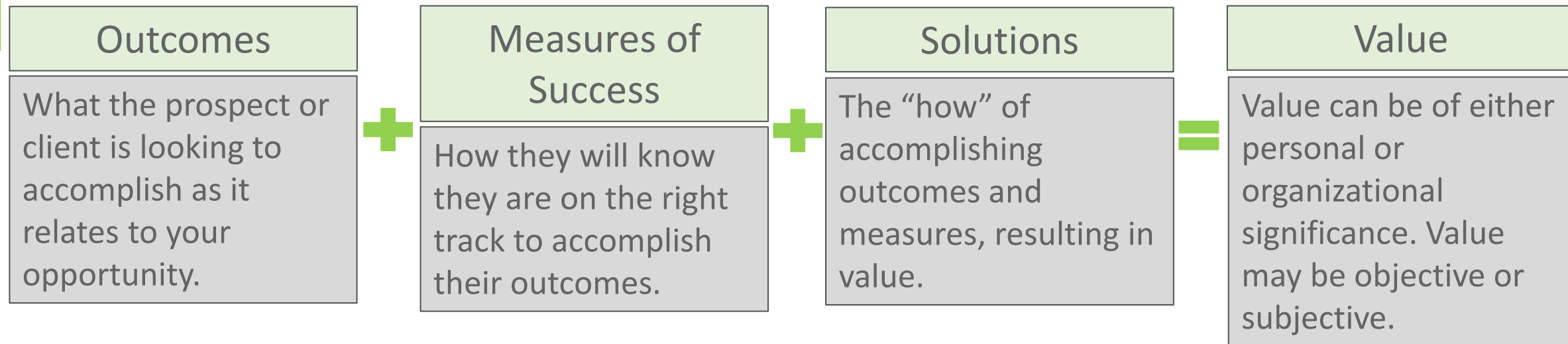
P O L L Q U E S T I O N

**What is your company's
approach to proposals?**

“Flip the Equation” Proposal Framework

OUTCOMES + MEASURES OF SUCCESS + SOLUTIONS = VALUE

- Your proposal is a compelling case for change, as a trusted advisor
- Focused on outcomes and measures of success, and ultimately the value created together
- Solutions play an important supporting role, clear alignment to other elements is required



OUTCOMES

- Specificity to the client's business is critical, otherwise you don't stand out
- Examples from recent proposals:
 - Increase top line revenues to \$50M in four years
 - Improve profit margins by 10%
 - Add five clients in financial services sector
 - Identify expansion within existing clients



Outcomes

What the prospect or client is looking to accomplish as it relates to your opportunity

MEASURES OF SUCCESS

- Indicators of progress toward outcomes
- Examples from recent proposals:
 - Quantity of new bid opportunities
 - Percentage new business earned
 - Quantity of opportunities identified in current clients
 - Quantity of new strategic partnerships
 - Target percentage of product and services mix



Measures of Success

they are on the right track to accomplishing their outcomes

SOLUTIONS

- Strategic options directly aligned to outcomes and value
- Combine people, processes, technology, and expertise
- Include case studies and examples, allowing the prospect or client to visualize success
- Examples from recent proposals:
 - Go to Market Strategy
 - Team Assessment
 - Skill Building Programs
 - Ongoing Advisory



Solutions

The “how” of accomplishing outcomes and measures, resulting in value

VALUE

- Value includes organizational value and personal value to your decision makers
- Examples from recent proposals:
 - Increased shareholder value
 - Improved engagement internally and with clients
 - Improved sales culture and talent retention
 - Book of business becomes a sellable asset



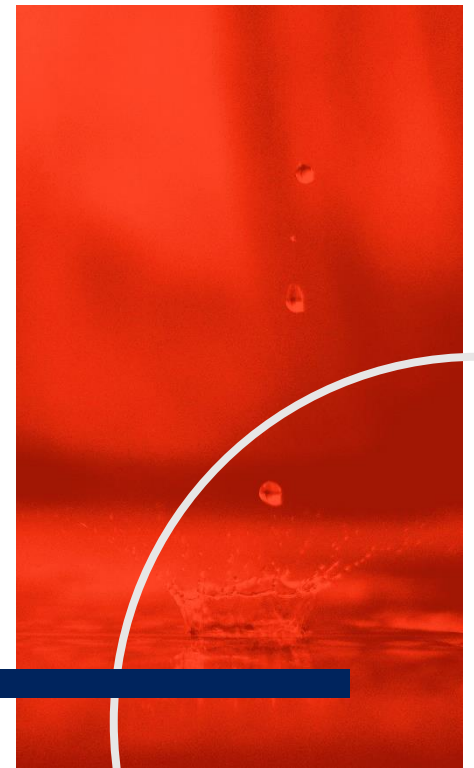
Value

Value can be of either personal or organizational significance; it may be objective or subjective

Proposal Don'ts to Avoid

Proposal Don'ts

- Don't lead with yourself / your organization
- Don't oversell
- Don't negotiate price without negotiating deliverables and terms
- Don't leave concerns until last



Strategies to Improve Your Win Rates

Keys to Effectiveness

- OMV: Outcomes, Metrics, Value
- Address the Why and the How
- Can effectively be sold upstream with your collaboration
- SRV: Simple, Relevant, Vital
- Use cases and stories
- Builds to a next step



C O N V E R S A T I O N

What is one thing you
can take action on from
today's conversation?



AMY FRANKO



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