Collaborating and Prioritizing to Design the Pre-Approved Proposal

By: Steven Power

In most sales processes, the salesperson presents a proposal immediately after conducting due diligence to determine the prospect's applications, problem areas, and current costs. Many salespeople have adopted comprehensive discovery processes that include the examination of workflow, document management applications, variable data printing, color printing, production printing, outsourcing, and e-forms.

While these expanded discovery processes can lead to the identification of many opportunities to innovate the prospect's document environment and thus many selling opportunities, they can as well create a disconnect in the sales process.

If you are a salesperson who has been extremely thorough in your discovery, you may have identified several problems and have a wide scope of recommendations. Let's say, for example, that you've documented twelve to fifteen problem areas and thus have twelve to fifteen recommended solutions, each containing an element or combination of products or services that will need to be included in your subsequent proposal.

Here's the obvious question. What normally happens when you charge in with a proposal that is wide in scope, requiring prospects to drastically change the way they operate? Furthermore, because your proposal is wide in scope, it reaches a relatively high financial threshold. What normally happens to huge proposals?

Usually, when too much change is suggested too fast, too much money is on the line, and too much commitment to one new vendor is involved, the prospect will get spooked and do one or all of the following: build up a resistance to change, get more people involved in the decision, start to comparison shop, and, at the very least, invite the incumbent vendor in for a quotation. The result is that you've done a lot of work for nothing. Here is where some brilliant strategy and a little patience pay offs handsomely.

In my Power Selling process, I train sales consultants to package the findings of their discovery process into an Executive Summary which includes a detailed description of the prospect's current state complete with problem areas. For every problem area the salesperson recommends a cost effective solution. Again, if you have identified twelve problem areas and thus are recommending twelve solutions the proposal can quickly get out of hand. The Executive Summary is presented to the prospect *prior to the delivery of the proposal* providing an opportunity to create a pre-approved proposal.

The strategy is to get your prospect to participate in *prioritizing your recommendations* and become involved in implementing your solutions before you even deliver your proposal. By collaborating with your prospects to identify which of your recommendations *they* want to implement first (prioritization), thus which of your recommendations they want proposed, you exponentially improve your chances of having your proposal accepted.

By prioritizing your recommendations, you will, in effect, "right-size" your scope of work and your related proposal to a digestible chunk. This will most likely ensure that the prospect approves your proposal without getting more people involved in the decision or waking up the incumbent vendor.

In consulting we call this "*phasing in the solutions."* Phase one is to implement the top three to four solutions over a reasonable time frame and measure the results. Phase two, upon confirmation of results, or earning the right, is to implement the next three or four prioritized solutions, and so on, until all the solutions are implemented over time.

Phasing in solutions gives the prospect a chance to implement manageable projects without assuming the huge risk associated with introducing drastic changes, totally changing vendors, and committing huge financial resources all at once. This process also helps you initially implement a manageable scope of work and deliver quick results. This leads to greater credibility, trust, and acceptance in implementing subsequent phases.

This is where patience comes into the picture. If you embrace this consultative process, you must be prepared to scale down your initial scope of work and your initial proposal to the top three to four priorities, get those solutions implemented, measure your effectiveness (results), and return every ninety to 120 days to review your results and then prioritize the next three to four recommendations.

Opening the Closing Conversation the Implementation Agenda

In addition to trial closes throughout the sales process, sales eagles have used the simple *Implementation Agenda* for decades as a way to *open the closing conversation* well before showing up with a proposal and contracts.

In my model, the Implementation Agenda is first presented in the Executive Summary presentation before a proposal is delivered. This step allows you to collaborate with the prospect on the logistical process for implementing your solutions. It also helps you open the discussion as to how and when you intend to close the sale.

On your Implementation Agenda, simply list the steps both organizations--buyer and seller--will need to take to successfully implement your solutions. By identifying the steps in sequence and attaching realistic time frames for each, you are pacing your prospect through future events that will lead to the sale.

The first few action steps and dates should be easily agreed on by both the buyer and seller. For example, prioritizing the recommendations and then reviewing the proposal for those solutions should present no push-back from the prospect. Remember that the next step is for the prospect to approve the proposal, and that the date you've attached is the same date as your presentation of the proposal.

In reviewing your Implementation Agenda, here's where a perfect world usually becomes the real world, and that's what you want. You want to know where you stand, what the prospect is thinking, the probability of closing the sale, and a realistic time frame for closing the sale.

If you're going to get a push-back or stall at closing time, let's find out beforehand what it's going to be, why, how long, and what needs to happen in order to get a favorable decision. In a way, you're inviting a push-back, an objection, or at least asking for a further education as to how your prospect makes decisions and conducts business. Here's where your prospect may say, "I can review your proposal next Tuesday, but I'm not in a position to approve it at that time." So far your goal has been accomplished--you've opened the closing conversation.

It's up to you to simply ask the prospect what needs to happen in order to approve the proposal. Get it out on the table now, before you even propose! You may hear anything from "I need to run this by my executive committee or accountant," to "It's our policy to send out Request for Proposals for these types of acquisitions."

Engage your prospect in discussing the specifics of this internal decision-making process and garner input as to a realistic time frame for implementation. During this conversation, you can modify the Implementation Agenda, adding action steps and reassigning dates until you've arrived at an agreement that works for both you and the prospect. By discussing the required steps for concluding the transaction, you've engaged your prospect in a highly collaborative closing conversation.

I know some salespeople who successfully present their Implementation Agendas with the dates left blank. They engage their prospects right from the start, partnering with them, making requests of each other, offering proposals and counterproposals, and making commitments to each other's action steps, jointly deciding on realistic dates for completion. The outcome is to get prospects involved in and committed to closing the sale. Remember, all these closing action steps and dates are worked out and committed to before you even deliver your final proposal.

Take a wild guess at the closing ratios my clients enjoy when they present a proposal for solutions that the prospect has already prioritized and pre-approved in principle. Keep in mind that they are presenting their proposals on agreed-upon dates, and that the prospect knows full well that the next action step is to approve the proposal on that same date. If you guessed around 80 percent, you're right!

Sample Implementation Agenda

Date	**Event**
8/21/04	Today's Office Solutions & customer review recommendations
8/23/04	Today's Office Solutions proposes recommendations
8/23/04	Customer approves proposal & completes documentation
8/25/04	Today's Office Solutions conducts pre-installation site survey
8/29/04	Today's Office Solutions installs technology & conducts end-user training
0 - 90 Days	Today's Office Solutions monitors results of implemented solutions
90 Days	Today's Office Solutions and customer engage in Account Review to identify further opportunities to improve business processes and reduce costs throughout the organization
On-going	Today's Office Solutions will conduct account reviews every six to assure customer satisfaction