

MARKETING SAVVY: Creating a Prospect Proposal: Read the Signs Before Writing

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How many times have you dashed back to your office crying "all hands on deck" to craft a client proposal - only to have the client eventually respond with, "We've put that project on hold" or "We've decided to stay with our current provider." What you may not realize is that the client could be asking for a proposal for reasons other than you think. Before you jump in and start writing, form strategies on how best to meet the client's need; a written proposal may not be the best first step to take.

Before You Write: Read the Signs

When you've been asked for a proposal, manage your excitement, take a deep breath, and respond with, "That's great! Can I ask some questions so that the proposal is sure to meet your needs?" Find out key information that helps you assess what the client is really seeking and that gives you clues on the best direction to go.

Proposal as an Educational Tool: Sometimes when clients are new to their job or just casting around for options and solutions without a planned process, they use proposals as their educational tool. Don't be discouraged; instead challenge yourself to think constructively about how to learn their motivation for the proposal and what role you can play in their education.

Use questions to help manage the process:

- "What is your process for the proposal?" Learn their timing, budget, who is involved in the proposal, the decision-making process, and so forth.
- "When do you plan to implement the new _____ and what do you want the outcomes of this project to be?" Assess the reality of the decision-making and timing of implementation, a process that gives you clues to how committed they are to making changes.

If they indicate they've started the proposal process without clear strategies or outcomes and are unsure about others' involvement, timeline, and budget, consider alternatives to a formal, written proposal.

- Offer a personal meeting to consult with them on this topic with no obligation. This allows you face-to-face time with them, enhances your credibility, and allows you an opportunity to gauge their commitment to new services or programs.
- Potentially send a sample project outline first, then follow-up with a telephone discussion. This helps clients frame their questions in the context of overall projects

Listen to your client to find out key information that helps you assess what s/he is really seeking.

"The greatest compliment that was ever paid me was when one asked me what I thought, and attended to my answer."

-Henry David Thoreau

and provides a safe zone for their learning curve should they be new to the position or the service.

You'll have to decide when your investment in a client's education is worth it. You may find that devoting time and energy to these clients is effective in differentiating you from the competition and becomes the basis of a long-term relationship.

Proposal as a Stall Tactic: How many times have you heard, "Oh, okay, go ahead and send me a proposal." Most times, that's a stalling technique. Either your prospect is being nice and not telling you to leave — or they have no power to truly advance the project and see this as a way to keep you progressing on their behalf without telling you the internal politics of decision making.

When you hear this type of response, your antenna should go sky high.

Ask yourself if you were pushing to a next action that made them uncomfortable? If so, step away by saying, "It doesn't sound like a proposal is the appropriate next step. Let's keep talking to further identify your needs and how your organization wants to work with a provider. That will help both of us better match your needs in the future." If you think this is a stalling technique, dig deeper: • "Before I write a proposal, can I ask you some questions?"

- "Tell me more about what you are currently doing for injuries at the workplace and who you use."
- "Where are there opportunities for improvement and what would that look like to your company?"
- "When we present a proposal, we like to work with key decision makers and users at a company. Who else should I interview prior to writing the proposal?"
- "Will there be a group presentation of the proposal?
If so, to whom and when?"

The answers to these questions help you ascertain the level of commitment. And, if the prospect is serious, but the decision maker isn't, this allows you to build an appropriate way to work with all parties to advance the proposal internally.

Proposal as Bid Leverage: Sometimes a company is working with another provider, but is required to obtain a competitive bid — and it's your lucky day! They'll usually call you asking for a meeting or stating on the phone, "I heard you provide x and I'd like a proposal."

Don't focus on the proposal, focus on what you need to know to determine if you really should write a proposal. Ask questions to explore what their project expectations are and why they believe a proposal from your organization is valuable to their process. Identify interesting alternative options for them to consider beyond their current provider's services. In essence, what does the customer want to change by looking at your offering?

It's always fair to ask where else the company is seeking proposals and to solicit specific goals and implementation information. Your questions might include:

- How did you select our firm as one of your bidders? • What are your selection processes, criteria, and plans for implementation?
- What are you trying to change with a new provider?

Use this information to weigh and balance whether you should devote the resources to submitting a proposal.

When Ready to Write: Maximize the Proposal as a Selling Tool

Once you've evaluated the situation and have decided on a written proposal, consider these tips for writing a document that will help you close the deal.

Demonstrate Understanding of the Client's Needs: The proposal helps summarize what you believe is the right solution to meet the demonstrated needs. Use the sales process to develop trust and to ask thorough questions to learn their needs and business goals and how to best meet their expectations. Cultivate your client to be your internal champion and to support you in the larger organization. Aim for presentation time not only with your client, but all decision makers. If the process requires a group presentation, pre-sell your internal champion as a required step, using the group meeting to further differentiate and reinforce the value of working with you.

Understand Their Motivation and Buying Process: Know their process for proposals, decision making, and implementation. Determine what is the culture for proposals and presentations—is it a formal Request for Proposal (RFP) that requires strict adherence to a written format or informal with a summary memo or agreement and a verbal presentation?

Match and Exceed Their Goals: Reiterate their goals, their measurements of success, then clearly describe how your proposed service can meet and exceed expectations. Differentiate your organization as the expert that delivers an exceptional value, well beyond anything competitors can attain.

Discuss Deliverables: Be prepared to discuss precise implementation and action steps. Instill confidence by being prepared and communicating clearly. Manage your excitement and prepare the action steps to match their personality and interest level.

Know your Audience: Tailor your interactions appropriately to different decision makers. If you're approaching a directive decision maker, don't bury them in the minutiae of implementation. Instead, focus on how quickly you will start (two days ago) and when it will be done (before they expect). If they're team oriented, develop an action plan that shows you understand how important the team is, and describe how you'll work with the team and achieve results.

Recognize the Power of the Proposal

Getting to the proposal is an exciting step in the client partnership. Make certain the timing and purpose is right for you and the client. It's paramount to prepare not only the "right" proposal, but also use it to help reinforce why working with you is the "right" thing for the client.

The proposal is the document that helps show the client you understand where they want to go and that you are the best choice as a partner to help them achieve that outcome. Never underestimate the power of the proposal in your selling process.



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