

PROPOSING AND CLOSING TIPS

convergo

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PROPOSING/CLOSING CALL: OBJECTIVES

- Differentiate your offering by communicating the value of your proposal in terms of value to the prospect
- Close for next steps

BAD PROPOSAL? TWO POSSIBLE CAUSES:

1) You didn't do your work connecting with the business and uncovering needs

2) You didn't capture your knowledge of the business and needs in the proposal

PROPOSAL FRAMEWORK

- ☑ Goals
- ☑ Connect solution to challenges
- ☑ Proof
- ☑ Current challenges that impact goals
- ☑ Implementation Plan

CLOSING TIPS *(Should feel like a "Soft Close")*

- Typically, failure to close is a symptom of something you didn't do in earlier stages
- Transition to implementation. When?
- Maintain control of the sales cycle
- Ask Why: Get any objections out on the table and resolve now or develop a plan
- Leverage digital signing platforms (ie., In your CRM, PandaDoc)

WHAT CAN YOU DO TO PREPARE (Should feel like a "Soft Close")

- Ensure key contacts on the client side are scheduled to attend
- Use Virtual Meeting Value Proposal Planner
- "Tee up" the client up - *Send them stuff to get them excited!*
    - The agenda
    - A quick video
    - Case study
    - Manufacturer resources
    - A blog
    - White paper

WHAT YOU CAN DO NOW

- Use the Virtual Meeting Value Proposal Planner as you navigate the sales cycle
- Work as a group to ensure:
    - You have a written proposal and PPT proposal leveraging the Proposal Framework
    - Create a list of resources to support you in the phase and create/find content to close the gaps
- Do a 1 to 1 video and send over resources
- Do deal reviews with your teams using the planners: *don't tell yourself you lost because of price*

VIRTUAL MEETING PROPOSAL PLANNER

ACCOUNT NAME

Goals

What's at stake?

Challenges that impact goals:

Connect solution to challenges:

Proof *(References, Testimonials, Case Study, Share Product Video):*

Compelling Event(s)

Reason to Act Sooner

VIRTUAL MEETING PROPOSAL PLANNER *Sample*

ACCOUNT NAME	XYZ IT Company

Goals	**What's at stake?**
Securing the network Automating workflows	HIPPA Compliance, Patient Financial data More productive staff

Challenges that impact goals:

1. Current MFP and printer is not secure
2. Document capture process is extremely cumbersome

Connect solution to challenges:

1. New MFPs are certified secure
2. New system captures paper directly into SharePoint workflows

Proof *(References, Testimonials, Case Study, Share Product Video):*

Show video on MFP Cloud Capture, send security white paper to address questions, send Western Orthopedic case study video, send Boulder Medical Center reference

Compelling Event(s)	Contract Expiration in June
Reason to Act Sooner:	Compliance, protect patient information