

The Proposal Format

1 ❖ COVERING LETTER

Key points in the body of the letter to include:

- Thank You
- Summary of Criteria
- Mention of Solution
- Call to Action

2 ❖ CURRENT SITUATION

Your understanding of their key concerns repeating back in writing using their words. By your questions you will have identified what they want to avoid and what they want to achieve. These are their real needs with implications and associated costs to the business of not changing now

3 ❖ PROPOSED BENEFITS

Once again using their words you will include the advantages ascertained through your questioning around and benefits to the company of addressing these concerns and how moving forward will have a positive impact on the business.

4 ❖ PROPOSED SOLUTION

Your offering based on the Features, Advantages and the Benefits that ONLY address their needs. Don't put extra in as it may make your offering irrelevant.

5 ❖ CURRENT FINANCIAL SITUATION

Demonstrate hard costs and quantify soft costs where possible based on what they currently spend.

6 ❖ PROPOSED FINANCIAL

Outline proposed hard costs and compare with total current costs minimising the gap.

7 ❖ SUMMARY

Paints a picture of the customer moving forward in the business outcome important to the customer i.e growth, partnership, market share etc

Seven Essential Parts