

How To Present The Proposal

When you are at the point of presenting the proposal, be that over Skype or in person there are some key things to ensure you say/do in the meeting.

When To Hand Out The Proposal

First up, NEVER email or give them the proposal before you meet with them. If you conduct the meeting over Skype video, you send them the proposal when you first connect on Skype. If it is a Face to Face meeting, you hand it out at the meeting.

You also ask that they resist the urge to read ahead. I will sometimes make a joke of that. And I don't bring it up unless I see someone start to flick through.

If you are presenting in person, you need to have enquired before hand how many are likely to be in the meeting, and ensure you have an extra copy on top of that number. Better to have too many than not enough.

How To Introduce Yourself, Begin The Meeting

ALWAYS thank the audience for the opportunity to present to them. I will often say something along the lines of:

"I am very excited to present this to you today. Following our initial discussion I took away that you had said you wanted _____, I believe I have addressed that in a way that you will like in this proposal. My desire at the end of this meeting is to get an agreement from you on whether you would like to proceed forward or not."

If I do not say that final sentence in my opening, I will then say it in the closing which will be addressed in that section.

During The Proposal

For this type of meeting, I would recommend that you allow interruptions for questions regarding the proposal.



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I also look out for facial and body language queues if I see some discomfort or questioning.

Remember to take it in your stride, and do not worry that it means they hate the presentation. Everyone has their own pattern with showing up in meetings, based on how they want to be seen in the world.

Sometimes I will ask them if there is something they'd like to ask me, other times I will ignore it and allow them to ask their question if they choose to do so. If I do the former, it is generally because their facial expressions or body language are very discernible.

It is quite normal for someone to ask a question and you will address it further in the proposal. At that point, you simply say: *'That's a great question, I believe I do address that as we move through this. If you still feel you're question is not answered, please ask me again at that point. I'd prefer to address that when we are at that stage of this presentation.'*

I always look to make eye contact when I am presenting. And to keep my voice engaging and enthusiastic about the contents, without going over the top. Presenting a proposal is another way to offer value. As you are sharing your recommendations to benefit their business. So there is no need to try to 'sell' to them. Instead you want to engage them.

With the Objectives, I always ask for their agreement on the Objectives - remember Objectives are to be measurable. I would say something like: *'The Objectives as I see them are, _____, this is based on our earlier discussion. Do they feel on the mark for you?'*

I will also approach the Key Issues section like this as well, if I choose to include that in the Proposal. Key Issues come before Objectives, as the Objectives are designed to address the Key Issues.

As You Are Wrapping Up The Proposal

At this point you would ask for questions. It is OK if you don't have an answer on the spot to the question if it is something outside the topic of the Proposal.

You may also find that the Prospect will bring up other things they've decided they want. Always respond positively that you can absolutely do that, and are happy to explore it further with them. That it is outside the realms of the realms of the proposal just presented which was based on previous conversations.



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However if they would like to you to some revisions to include that, you'd be happy to do so.

Take the attitude that you can deliver to anything, even if you don't know exactly how to. And always give yourself the room to move to, by saying you will look at that in greater detail for their business and come back to them.

You want to come across as 'can do', not 'worry wart'. And at the same time have clear boundaries. As the Pricing in the Proposal will be based on the contents of that Proposal, and any changing goal posts would mean a re quote.

When you are upfront about this, it is not a problem.

Closing The Presentation

At this point, you would ask for any further questions. And then close by saying something like:

'So what are the next steps? Is this something you would like to go ahead with?'

Or I might close with:

'So that's the proposal. I would very much like to get started on this and make it happen for you, as I know we can achieve those objectives. What do you think?'

If they suggest they will come back to you. You want to get clarity on the when and to close as soon after presenting. In that instance I would suggest:

'I understand you want to think about it some more. Would it be fair to ask that you come back to me within 3 days time? I am excited to begin working on this with you, and I know I can get started on this immediately based on receiving your go ahead and down payment. I do have another project I am creating a proposal for, which I am expecting to get. I had planned to start that after yours, and would like to have you as first cab off the rank based on having your confirmation to go ahead & deposit before the end of the week/early next Can we work to that?'

Now you are welcome to use your own words. As how you address it comes down to what you are comfortable with. The MUST is that you do need to close. Rather than leave it open.

So even if you do not get an answer then, you need to agree on specific timing of when they will get back to you by. And it needs to be within 5 working days ideally.



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I have seen people lose contracts, because the Prospect says: *“I’m not sure right now, I am investing in some new equipment, so this is something I’ll relook at in a month’s time”*

If you do hear that, in your own mind you have to write them off AND still follow through with calls, as sometimes it is a legitimate reason. However DO NOT hang your hat on that response.

If you do receive a response like that, I would respond with:

“I appreciate you have to invest in other areas right now. I’d like to check in regularly with you to see how you’re going. I also need to be upfront and say that if we are looking at it down the track, I can not guarantee this same pricing, as I generally don’t offer such significant discounts, and I was so keen to get started right away I wanted to make it as easy as possible for you to say yes.”

Notice how with every response, I am positive, yet offering clear boundaries on how I run my business. This is how you need to be with your business. Always be polite and positive, and always have clear boundaries in how you run your business.

It is all about the client, with regards to offering value to their business. And at the same time it is about being clear yourself that you are a business professional, and as such have a clear model for how you run your own business.

Payment

When the prospect says yes to you working on their business, it is important to follow through on the Payment Terms in the Proposal. Which is recommended to be that for all Services such as Website Creation, Google Places Listing, Mobile Friendly etc - that it is 50% up front and 50% within 7 days of completion.

And for all SEO type services that are monthly fees., it is 100% up front.

Timing

Always allow yourself a buffer regarding timing. NEVER pass onto a client what you are advised by the Programmers. Always add 5-10 days onto that if you are told 5-10 days.

At Proposal stage, if they ask you timing, your response would be something along the lines of:

“Once I receive the first payment from you, we can get started from there. I will have to come back to you with a clearer idea at that time of how long it would take to complete. As it will



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depend on working it in with our other projects and ensuring my key people are free to assist me with this. I would suggest as a ball park between _____ and _____ to complete.

Final words are:

ENJOY the Proposal Process. The Proposal offers considerable value to the Prospect, as it is giving them a clear blueprint of what it is you believe they need to be doing to achieve success for their business via the digital solutions you are recommending.

Even if they do not go ahead, it is excellent practice.

The more you focus on offering tremendous value, the more likely they are to say yes to you!

