

# The Microsoft Reseller's Guide to Quotes and Sales Proposals

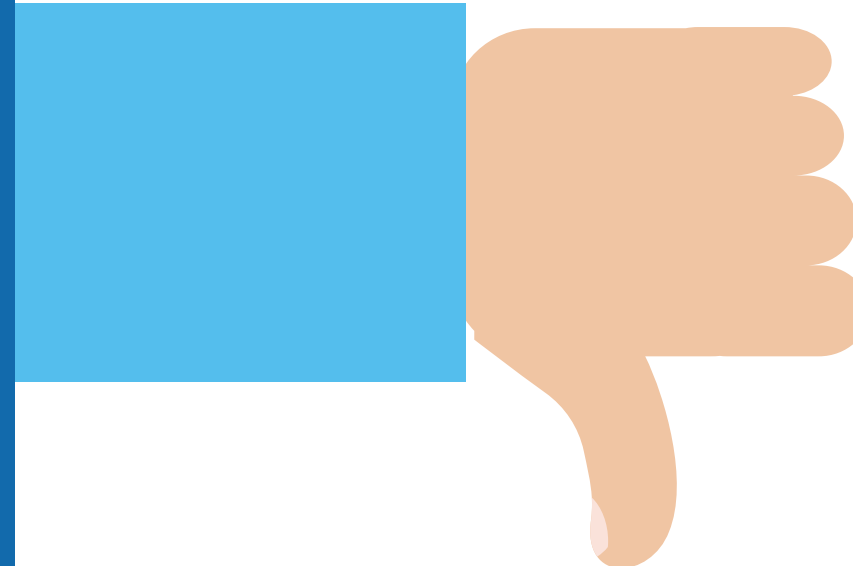
# Introduction

## “We lost the deal? What happened?”

Sounds all too familiar. And what’s worse is that Microsoft resellers and their sales professionals often don’t know that it is not about the money. . . but the proposal itself. This eBook details five steps for building winning sales proposals, forever changing your proposal success rate. . . and your business.

## Where Do Proposals Go Wrong?

A proposal is a document that solidifies your relationship with your customer. The proposal should identify the business problem(s) and document your technology solution. In short, the proposal is a solutions document offering your company as the best solution, regardless of price. So how do you offer yourself as the best Microsoft resellers and what key things can you provide as evidence? Look to your work and your reputation as your proof points. Offer references from existing customers, key studies you’ve participated in, articles your company has published, membership in professional organizations and your experience as a guest speaker.



## Are there “Bad” Proposals?

Sadly, there are. As discussed, they are simply pieces of paper that don’t reflect a relationship. They are:

- **Unattractive**
- **Delivered late**
- **Poorly branded—not reflective of who you are or the solution you offer**
- **Uncompetitive**
- **Error ridden (typos and poor grammar)**

## What is a “Good” proposal?

The opposite of “bad” proposals, of course! Good proposals are moneymakers. They are:

- **Attractive, informative, accurate**
- **Delivered in a timely fashion**
- **Positively reflect the branding and image of the company**
- **Competitive and impressive**
- **Delivered in a manner reflective of your technology**



# 1 Keep It Timely

Always keep your commitment for delivery time frames; your vast experience will help you to establish standards and goals for what is “timely.” Track your proposal responses to ensure that you’re meeting not only prospect deadlines, but also your own time line’s goals. Timeliness is the first commitment in your relationship and sets the stage for the future tone of your relationship.

Remember, sales is a service and should be treated as one. During this stage of the process, regardless of whether you’re communicating with a current customer or a new prospect, you’re indeed in a sales cycle. You should treat the quote as if you are servicing, or assisting, an existing customer. In short, your response is a reflection of your services. Your proposal response should be as quick and as efficient as if you were handling a customer call.

*And what are your best weapons against a lack of timeliness?*

**Two things: technology and an efficient process.**

Using an automated quote and proposal tool to replace slow manual processes will allow you to be faster and more efficient, thereby helping you meet (and even exceed) those deadlines.





## 2 Create Standardized Processes

How do you generate proposals now? Is it chaos, where everyone involved scurries around contributing pieces to a proposal in hopes that the end result will be better than the means to get there? Or is it an organized, systematic, clean process where all involved offer their best, culminating in a first-rate end-product? Traditionally, the proposal process is administratively heavy, requiring the incorporation of multiple documents from various contributors (e.g. sales, finance and and professional services), which is often a tedious, error-prone load on a sales rep.

Making the effort to look closely at how you currently create proposals and investing the time to improve them will result in a standardized, repeatable proposal process with the highest quality product. Having this process will also make it scalable, allowing a faster ramp up for new employees. Furthermore, incorporating automated quote and proposal technology into your proposal process will streamline that former chaos, and your sales team will welcome the opportunity to easily and quickly generate a proposal, instead of dread it.

According to Microsoft, **THREE OUT OF FOUR CUSTOMERS ENGAGE** with technology solution providers to deploy Microsoft® Office 365™. ConnectWise Sell™ (formerly Quosal) standardizes that process with its pre-built templates for selling Office 365 migrations. Now, you no longer need to piece together a quote from a spreadsheet!

## 3 Offer Meaningful Options

How unhappy would you be if you went to the electronics department to buy a television, and there was only one TV to look at? Your customers are much the same. Your proposal should never offer just one solution; you run the risk of them being disappointed with their one option. However, if you expand your options to three –the “great” solution, the “greater” solution, and the “greatest” solution – you’ll make your customer aware of all your excellent services AND they might just upsell themselves when they see all their options and all your great offerings.

What’s more, you should deliver your proposals with a clear course for customers to easily ACT on their option of choice – because they will!

ConnectWise Sell’s professional templates deliver intuitive quotes and proposals to create **POSITIVE CUSTOMER EXPERIENCES**. Deliver an interactive presentation via a personalized URL, including videos and meaningful options for customer selection. Then make it even easier for your client to say “Yes!” with a built-in e-signature.

# 4 Remember, Image IS Everything

Just because the proposal is typed, and you've used a word processing program to add some fancy bullets, doesn't mean it's professional quality. If your customer feels like you didn't put any effort into your ordinary-looking proposal, they won't take the time to read it and won't feel confident that you'll put much effort into any work you do for them.

Your proposal reflects your company, its professionalism, its service, and its dedication to doing everything by the highest professional standards. Be sure that your proposal doesn't have any spelling or grammatical errors. Show your creative skills! Not all solutions are cookie-cutter, so your proposals shouldn't be either. If you took good notes during your assessment call, incorporate some of that information into your proposal to show how well you listened.

Automated quote and proposal programs, like ConnectWise Sell, have style templates that **TAKE THE GUESSWORK OUT OF MAKING YOUR PROPOSALS LOOK GREAT, EVERY TIME.** What's more, ConnectWise Sell also has customization options so you can incorporate your company branding into your quotes and proposals to help build a positive association with your business.





# 5 Integrate to Streamline

Picture this: A sales representative walks into the office of his prospect with his tablet computer. They continue the conversation regarding some issues the customer is having and the solutions the sales rep is offering. The sales rep enters all this information into his tablet. From here, he can generate a proposal on the spot, the customer can sign the agreement on the tablet, and the sales order is processed instantly. Or he can email the proposal for the customer to complete electronically.

In this case, the sales rep has the ability to generate a compelling proposal on-site with the prospect. You could have the same advantage, too. You'll need to merge your opportunity creation and sales management platforms with your product fulfillment system to ensure your proposals are tracked and accurate. Integrating your systems so all information is centrally housed and easily accessible will guarantee a more streamlined process and happier work-lives for everyone.

In the cloud world, there are quoting platforms that allow you to create and present your proposal document electronically through one easy-to-access link. Any updates or changes to the proposal are completed on the back end, and every time the customer views it, they see only one always-up-to-date version (which means no messing with "do you have the right version?" issues). For your electronic buyers, this is another example of how an automated proposal system will streamline the entire proposal generation process.

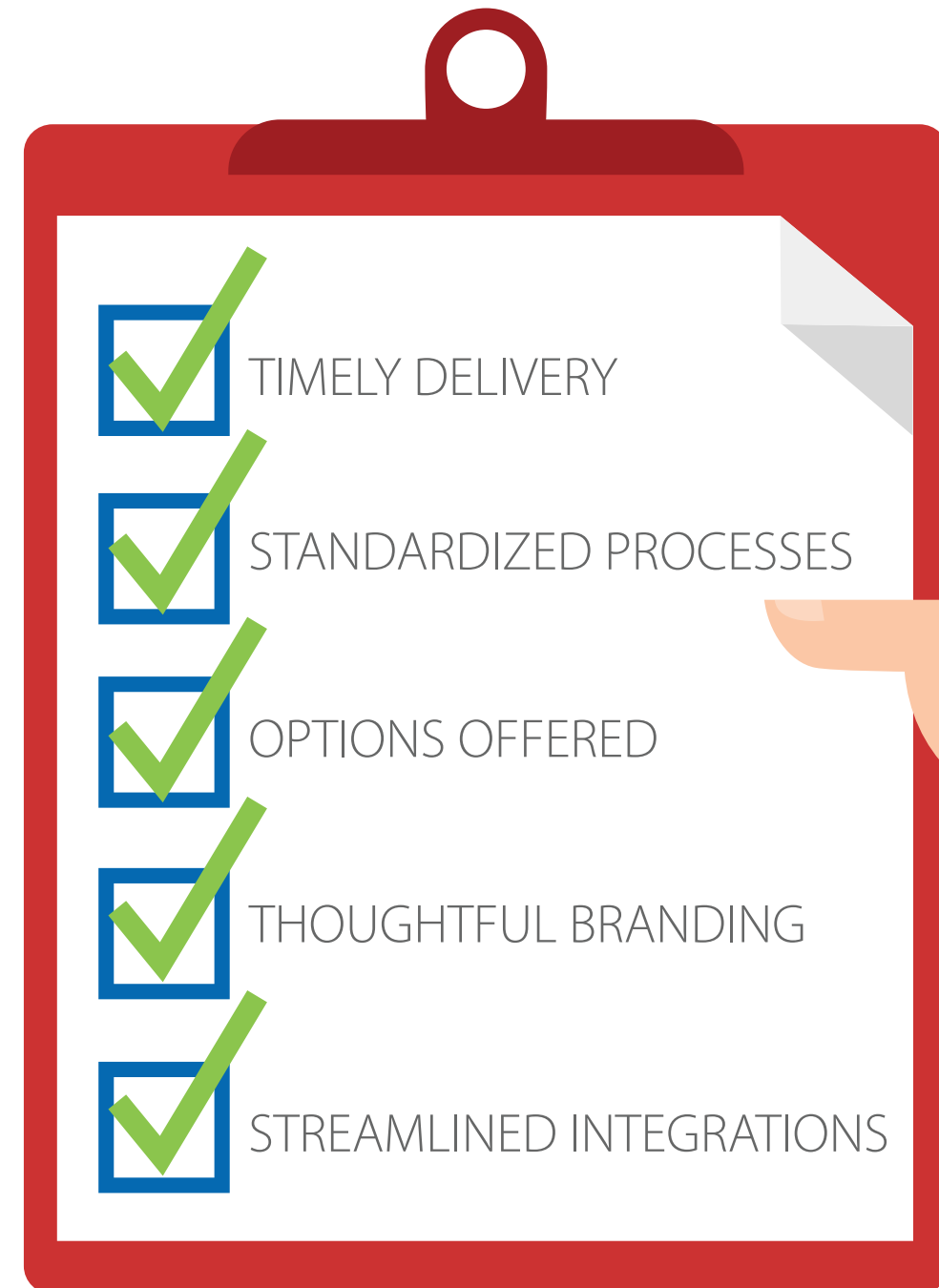
ConnectWise Sell's cloud compatibility frees Microsoft resellers from the limitations of an on-premise quote and proposal process. Now, attaching supporting documents, collecting credit card information, receiving customer approvals via e-signatures, and even automatically updating your CRM, **CAN BE DONE FROM ANYWHERE.**



# Conclusion

## Invest in your Quote and Proposal Processes

You've talked through problems and solutions with your prospect and have developed a relationship, and now you're ready to offer your proposal. You know that the proposal is the first solid evidence of your work product. For Microsoft resellers, it's important to invest in your proposal platform and process. Having a repeatable process based on the latest technology and streamlined with your business management platform or CRM will ensure an efficiently processed order. Devote time and resources into training everyone associated with sales on the proposal process. And finally, invest in your branding, image, and marketing to get that professional look that epitomizes who you are. Put these five steps together, and your proposal will stand out against a sea of lackluster competitors.



[Want to Learn More About ConnectWise?](#)





## Create Quotes & Proposals Anytime, Anywhere »

ConnectWise Sell is a quote and proposal automation solution designed to help you get quotes out the door and profit into your business. Generate professional quotes anytime, from anywhere, and track the results immediately. Take advantage of unparalleled business intelligence for full visibility into your sales process, and keep your sales cycle short and strong.

Sell makes it easier and faster than ever for your sales team to generate professional, accurate, timely quotes and proposals. Our innovative tools help maximize your chances to win every quote and proposal, as well as providing a constant stream of micro-rewards that continuously recognize your sales team's efforts.



## Take Control of Your Sales & Marketing Efforts »

Create opportunities, manage leads, and maximize your sales with the sales and marketing tools inside ConnectWise Manage. Even if it's not your area of expertise, you can enhance your sales and marketing to help keep your business growth on track and above expectations. Stay on top of sales opportunities, with full and constant visibility into your pipeline. Bring in new leads with customized, professionally created marketing campaigns, and track every action on the campaigns to best allocate your efforts and resources. Once the sale is made, keep handoffs to project management seamless and simple.

# About ConnectWise

ConnectWise transforms how technology solution providers successfully build, manage, and grow their businesses. Offering a comprehensive set of award-winning solutions that deliver a seamless, simple user experience, ConnectWise gives its partners the ability to increase productivity, efficiency, and profitability.

Just as importantly, ConnectWise's relentless commitment to innovation and unparalleled passion for partner success assure its partners have comprehensive business support through every step of their journey. Today, more than 120,000 users in over 50 countries take advantage of the competitive edge that comes from ConnectWise solutions and its powerful network of ideas and experts. For more information, visit [www.ConnectWise.com](http://www.ConnectWise.com) or call 800-671-6898.

