

AAM Summit Session Recap

A3 – The Proposal is Not a Sales Event

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How many marketers have had a partner walk into their office, throw a business card down and tell you to send a proposal out as soon as possible. Well, this has not only happened to me, but has happened to many of the marketers who attended “The Proposal is Not a Sales Event” given by Gale Crosley.

According to Crosley, the proposal should not be treated as a sales event because the sale is made way before the proposal is submitted. In fact, she compared putting together a proposal without doing the selling in advance to proposing marriage without dating first. Instead, the proposal should be treated as a ‘history book’ of the agreements made during the sales process. In a way the proposal should be a written record of the conversation you had with your prospective client.

Crosley says that it is very important to elongate the sales cycle in order to give yourself time to build relationships. You will need provide guidance and lead your prospect down the path of the relationship, otherwise they will be lost and your opportunity will fade away.

Step 1: Getting Ready

In order to create an effective proposal, you should ask the following five questions:

1. *Why change?* What has prompted the client to consider changing their accounting firm?
2. *Why now?* By finding out the urgency, you will have a better idea how long the sales cycle will be.
3. *Why us?* Take this chance to find out what they think they know about your firm.
4. *Who else?* Who do they consider your competition?
5. *Who cares?* Who are the key decision makers at their company?

Step 2: Develop Your Strategy

Your primary objective in developing your strategy is to establish a relationship with the key decision makers. Start as high as you can within the company and use multiple people at your firm to divide and conquer. Crosley stressed that relationships are built one-by-one and one-on-one.

It is important to create individual value propositions by showing how your professional objectives, personal objectives and your company’s offerings result in a high value solution for your client. Crosley recommended that you take this chance to have the client preview the draft proposal, which would not include prices. This will allow them to make

any changes in advance of the final version. This also serves the purpose of establishing your company as a collaborator and teammate.

Be sure solidify the relationship and avoid the black hole of never getting a response by establishing an advocate. It is also a good idea to determine the next steps to ensure that you always have another meeting scheduled. Now is your chance to question the client for any feedback they might have.

Step 3: Collaborate to Close

Look for the buying signs and follow them through to close the deal! As Crosley said, “The way you develop opportunities is your competitive advantage!”