# RFP responses made easy

## Winning formats, content, and follow-up to close more sales

An **iQuoteXpress** whitepaper, 2019

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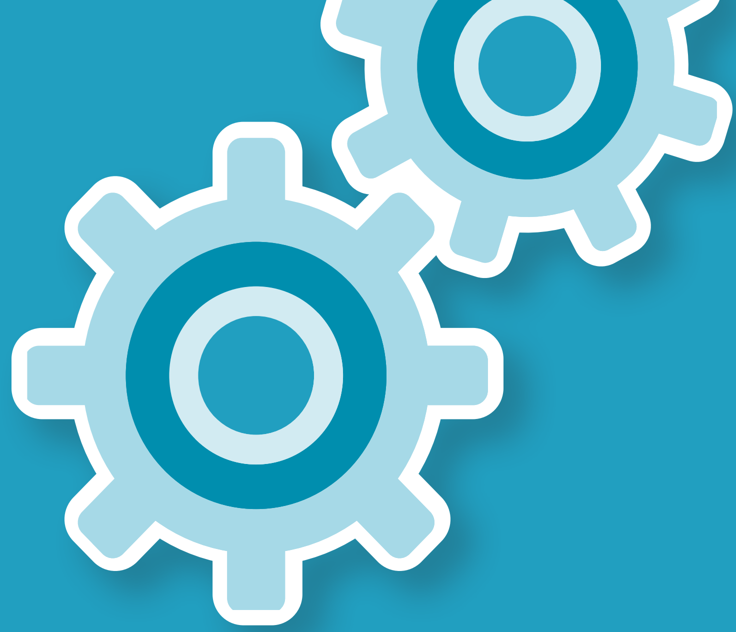
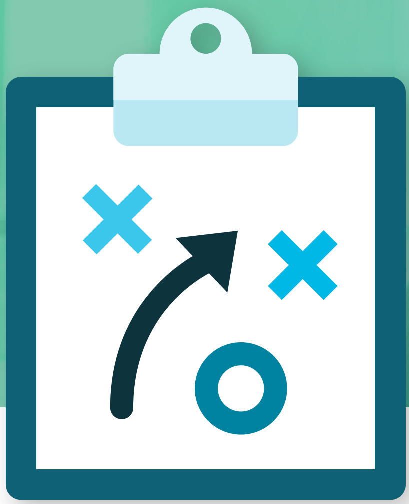
It's not easy to create an RFP response that 1) perfectly addresses a customer's pain point and 2) has a professional look and feel that 3) builds your brand and 4) sets you apart from the competition, while also 5) getting into the prospect's hands quickly. But that's exactly what RFP responses need to do.



However, it's unlikely you have a team of salespeople all of whom have expertise across every domain required to create killer RFP responses, such as: proposal design and formatting; a compelling (and grammatically correct) business writing style; and effective, timely follow-up techniques.

In this whitepaper, we will provide you with practical approaches for improving your RFP responses — and your overall sales quote process — that can help ensure every proposal you send speaks to the customer, supports your brand, and maximizes the return you reap from the effort you put in.


It's about understanding — and then optimizing — the basics of formatting, content, writing, and follow-up. But first some context establishing the relationship of the RFP and the RFP response.



# Your RFP response is like a first date

In many ways, launching a business relationship is like starting a dating relationship. When they send you an RFP, they're saying, "We looked at your profile. We swiped right. We're thinking of taking things to the next level."

Don't get nervous! They like you! You're halfway there. Now, with your response to that RFP, it's time for you to define that next level (next date), to demonstrate your bona fides over other possible vendors/suitors, and to say, "Yeah. We like you, too." And nothing says "We like you, too," better than an immediate reply that hits all the right notes (no need to play "hard to get," here).

But before you reply, research. Take a close look at each prospect's request and business to match them with the appropriate services/solutions you deliver. Sometimes, you may find that not every RFP deserves a response, so don't feel you have to reply to everything that comes your way (in dating parlance: "don't be desperate").

And remember that your RFP response is not the start, middle, and end of the relationship (well, sometimes it's the end). Keeping with our dating analogy, your response is still only the first date, and the goal of a first date, typically, is not marriage but a second date.

It’s okay to use your RFP response to set up a call or a meeting — you don’t always need to close them at this stage. The only thing you really need to do in your RFP response at this opening stage is follow some best practices:

**READ THE RFP REQUIREMENTS**

Many RFPs will include a document that explains how your proposal will be “scored,” similar to the way a professor might grade an academic paper based on a rubric. Pay attention to these “requirement criteria” to strengthen your proposal across the board. Treat every requirement as a problem to be solved and describe how your product or service is a solution.

**ENSURE YOU HAVE THE RESOURCES TO RESPOND**

Once you have a sense of the requirements, it’s time to take a good look at your internal resources. Are you up to the task of taking on the work you propose? Sometimes, customers will treat RFP responses as business agreements. Should your proposal be approved, it’s bad form – not to mention bad business – to cancel. Make sure you have no conflicts and that enough experienced team members are available to address the RFP’s requirements.

**READ THE RFP REQUIREMENTS AGAIN**

Once you know you have the bandwidth, resources, and team to address the RFP, read the requirements again. This time, you should be able to put several fresh pairs of eyes on the RFP. Team members will have the opportunity to provide input about where their expertise might best be allocated, which can be valuable insight as you move forward.

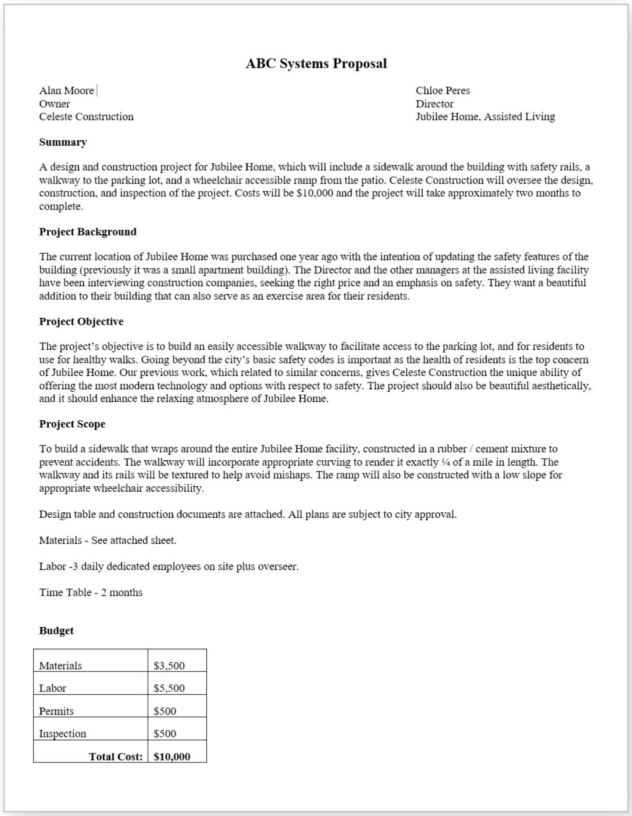
Once you know you’re a fit, it’s time to get busy with your response. And the first element in a building a successful RFP response is its framework, or format.

# Formatting RFP responses — how to look like a pro every time

When it comes to a sales proposal and the ways to format it — the templates we can use, the graphics, the fonts — some sales people become like a kid in a candy shop. They'll want to add this screenshot, that table, this bulleted list, that chart… until the proposal becomes a dizzying document beyond human comprehension.

For others, the opposite problem arises, and they ultimately produce nothing more than a Word doc or Outlook email with 12 pt. Times New Roman text featuring a product name and a quote — a sales proposal in a bare-bones format so "meh" it could have been done on a Post-it note and lost none of its engagement potential… because it had none to begin with.

**"Meh" RFP response**



**ABC Systems Proposal**

Alan Moore | Owner | Celeste Construction

Chloe Peres | Director | Jubilee Home, Assisted Living

**Summary**

A design and construction project for Jubilee Home, which will include a sidewalk around the building with safety rails, a walkway to the parking lot, and a wheelchair accessible ramp from the patio. Celeste Construction will oversee the design, construction, and inspection of the project. Costs will be $10,000 and the project will take approximately two months to complete.

**Project Background**

The current location of Jubilee Home was purchased one year ago with the intention of updating the safety features of the building (previously it was a small apartment building). The Director and the other managers at the assisted living facility have been interviewing construction companies, seeking the right price and an emphasis on safety. They want a beautiful addition to their building that can also serve as an exercise area for their residents.

**Project Objective**

The project's objective is to build an easily accessible walkway to facilitate access to the parking lot, and for residents to use for healthy walks. Going beyond the city's basic safety codes is important as the health of residents is the top concern of Jubilee Home. Our previous work, which related to similar concerns, gives Celeste Construction the unique ability of offering the most modern technology and options with respect to safety. The project should also be beautiful aesthetically, and it should enhance the relaxing atmosphere of Jubilee Home.

**Project Scope**

To build a sidewalk that wraps around the entire Jubilee Home facility, constructed in a rubber / cement mixture to prevent accidents. The walkway will incorporate appropriate curving to render it exactly ¼ of a mile in length. The walkway and its rails will be textured to help avoid mishaps. The ramp will also be constructed with a low slope for appropriate wheelchair accessibility.

Design table and construction documents are attached. All plans are subject to city approval.

Materials - See attached sheet.

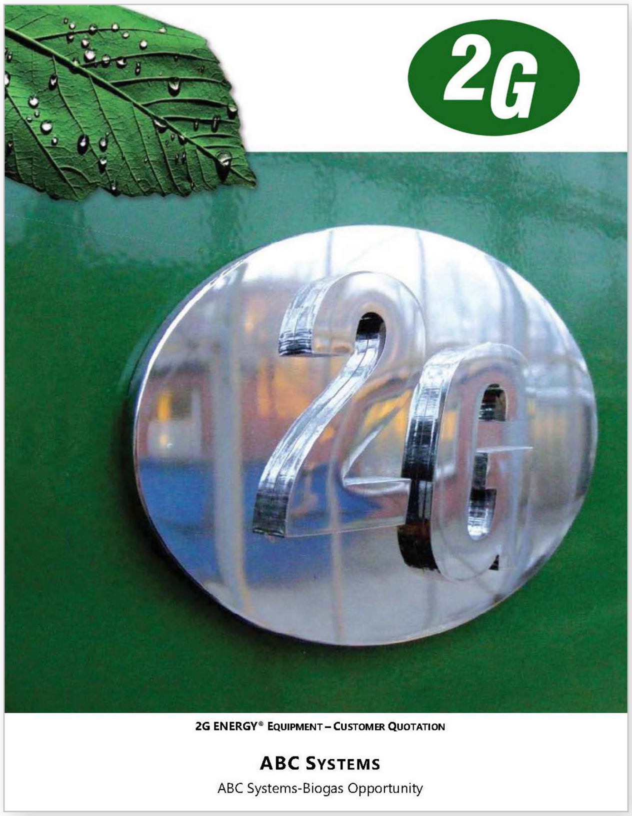
Labor -3 daily dedicated employees on site plus overseer.

Time Table - 2 months

**Budget**

| | |
|---|---|
| Materials | $3,500 |
| Labor | $5,500 |
| Permits | $500 |
| Inspection | $500 |
| **Total Cost:** | **$10,000** |

**"Candy shop" RFP response**



Always keep in mind that the decision to sign the dotted line is often based on the look and feel of your proposal as much as its content.

A poorly formatted quote, a proposal template that doesn't render on mobile devices, a look/feel that strays too far from the expected format of a sales document, or even a simple typo can derail your chances of winning a customer.

There are some easy wins: responsive templates (that "stretch and shrink to fit" on any device), standard fonts, relevant, streamlined graphics — in other words, keep it clean and simple. Ensuring your sales proposal system is populated with professionally designed templates can work wonders.

Because in most every case, your RFP response is one of many under review, and a professional appearance is not a nice-to-have, but a must. Think about your first job interview — did you wear jeans or a suit? You wore your best to make the best impression. Your proposal formats must do the same.

# Formats for each vertical

Most sales proposals have generic elements you'll find no matter the market (e.g., an "About us" section, products and pricing, etc.). This is all well and good, but ideally these elements and the more custom product and pricing components are presented within professionally formatted templates customized to the vertical markets you serve.

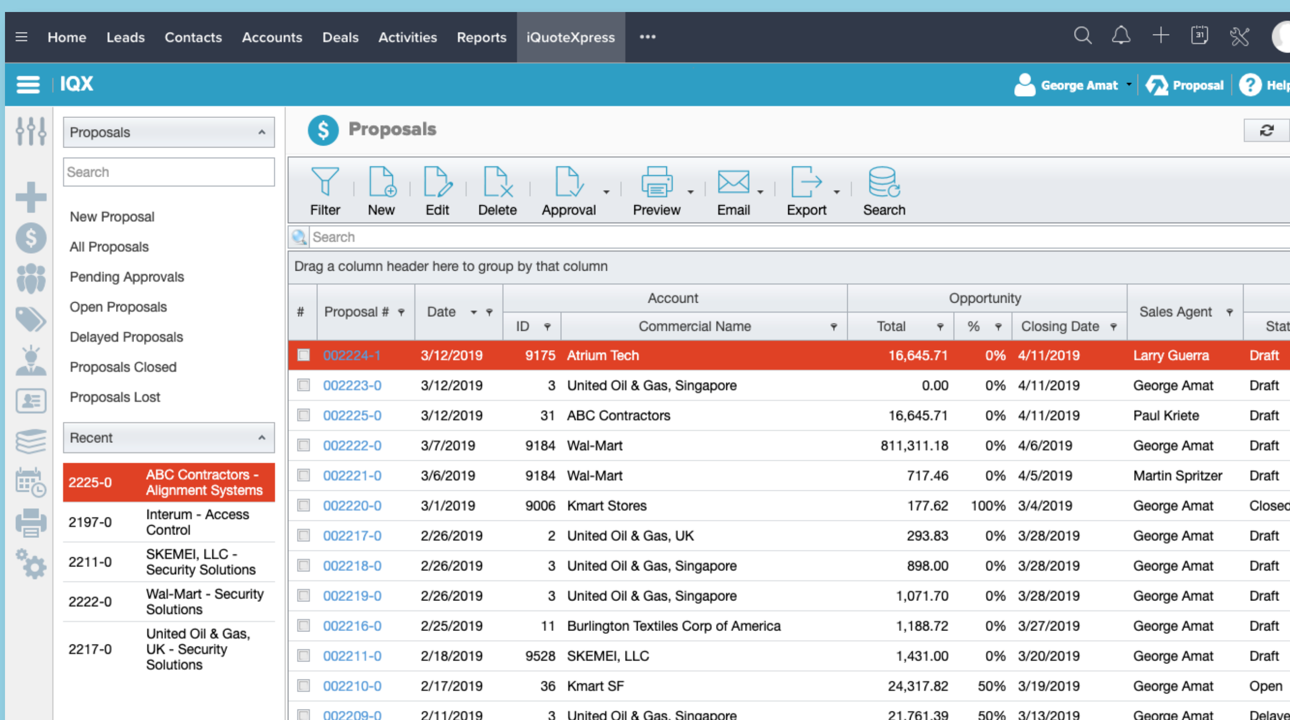
It's a huge time- and cost-saver to have preconfigured content plugged into these vertically targeted templates that demonstrates both your understanding of a given market and that details how your product fits into it. And if you can include vertically targeted testimonials, client lists, or case studies in your RFP response templates, even better.

You may say, "Why bother? My product is my product. We're a fit or we're not." But put yourself in your prospect's shoes for a moment.


**Vertically targeted proposal templates create the proper context for RFP responses.**

Imagine you work for a manufacturing company, and you have an RFP out for supply chain management software. You get a response to your RFP that shows industry-relevant data and uses industry terms. You see a screenshot from industry software. You see clear connections between the benefits of the product being offered and the industry it serves. And you even see a list of company names in your space, some of which you recognize. You'll say, "Wow… they know my industry… their products are trusted by my peers… they're sure to know exactly what I need."

With a proper proposal format in-hand — or, ideally, in a software solution like a configure, price, quote system (CPQ) that creates, delivers, tracks, stores, and optimizes every RFP response in your organization — it's time to populate it with the proper content.




**A CPQ system for automating the creation, delivery, and tracking of sales proposals.**

# Products & pricing, the core content of any RFP response

Content is not just words and images. In fact, in many RFP responses, words and images ride shotgun to products and pricing content. Many RFP response readers will cut to the chase, skip all the infographics and "about us" content, and focus only on the products and pricing you offer.

So how do you put products together? We don't mean "how do you build them" via assembly lines or machining or packaging. We mean how do you configure your ready-for-market products — and their prices — for sales proposals in a way that 1) appeals to the customer and 2) drives as much revenue as possible? Ask yourself the following questions:

- Can you customize product and pricing configurations in real-time for each customer?
- Do you have a platform or an approach that lets you meet both your customer's requirements and your own revenue goals?
- Are you setting prices intentionally or randomly?

Here are some ABC’s to ensure the most critical content in your RFP response is optimized.

**“A” stands for A.I.** Why configure products and pricing manually? There are solutions (such as CPQ) you can use in your proposal process that employ A.I. and machine learning to optimize your product and pricing configurations.

**“B” stands for bundles.** In almost every case, the best thing you can sell to a customer is ***more***. Centrally stored and administered product and pricing content — accessible across the enterprise — enables you to configure bundles that have been proven effective across your enterprise or market segment. (Although this benefit is next to impossible to realize without a sales proposal automation solution to track and report on your sales performance.)

**“C” stands for costs (and “D” for discounts)**. Match those bundles — created with a bit of A.I. on top of a foundation of sales input and experience — with the proper cost to your customer (and any discount structure required to close), and you have your product and pricing content dialed.

What makes for a proper price? Here are three guidelines to reference when you're determining the pricing you'll be using in your RFP response.

1. Don't set price based on cost. While it feels natural to set prices based on cost, it's often a huge mistake. Price should always be based on the value you're presenting to customers. This is the only way to establish long-term profitability.

2. Don't worry about giving everyone the same price. It may seem fair at first, but you can't afford to give every prospect the same price. You need to carefully segment your customers. Everyone has different needs and perceptions of your company. Remember, pricing matches value – so you should align this content in your quote with each prospect's perceived value of your product.

3. Don't just guess. In the early days of a business, it's not uncommon for startups to simply guess. These guesses are often based on other similar products and services in the marketplace and the cost of production. While this may give you a decent "ballpark range," it's a pretty superficial foundation and may end up hurting you.

You have your format, you have the proper product and pricing content: now let's tie it all together with good old fashioned communication, a.k.a., writing, which is often one of the hardest parts to master. The good news is you don't need a Master's in business writing to create a solid RFP response. You usually only need a few pointers.

# Writing well works, but writing good may work better

Have you ever received a sales proposal that suggested "engineering scalable channels," or "optimizing intuitive mindshare," or "monetizing cross-media infrastructures?" If so, we hope you showed it a quick path to the trash.

A successful sales proposal is about sticking to the basics. It's about making your case clearly, quickly, and convincingly. And it's about ***how*** you communicate as much as it's about ***what*** you communicate. In many cases, this can mean writing good rather than writing well.

Yes, writing well is correct and proper grammar. But a business proposal that truly connects with its prospects uses the language those prospects use everyday. So even if you spent your college years learning how to write well, sometimes in sales you gotta know when to write good.

This doesn't mean your sales quote has "ain'ts" and "shouldas" and slang. But it does mean choosing clarity over demonstrating one's complete command of the often antiquated rules of proper grammar. (Imagine if instead of saying, "High costs are something no business should put up with," you followed every grammar rule to say, "High costs are something up with which no business should put." Ouch.)

**Follow these three simple rules and you'll be writing good RFP responses (whether or not you're writing them *well* is up to you).**

## Forget the buzzwords

The best proposals don't drown the reader in polysyllabic buzzwords. Keep it simple, salesperson. In the language itself, you should:

- Be direct.
- Use short sentences (no more than 20 words).
- Use short paragraphs (no more than 2 or 3 sentences).

## Spell out the benefits

Your prospect wants one thing and one thing only from you: benefits. So move the focus from features, functions, and your deliverables to positive outcomes and the benefits your prospect will enjoy by choosing you over the competition.

Stay with the basics and keep a constant focus on the customer: the language they use, the business they're in, the challenges they face, and the benefits they'll enjoy by choosing you over the competition.

## Be "selfless"

Most every "How to Write a Proposal" chapter in every business book suggests starting with an "About Us." But in RFP responses, the most successful proposals almost always start with more of an "About you..."

**Remember:** your prospect's only objective is to solve their problem, so your sales proposal should dig into the basics of ***their*** business, not yours. Proposals that focus on the customer from start to finish are proposals that win new business.

And always put your proposal in everyday language: all's well that ends well, even if you gotta write good sometimes to make it happen.

Writing in a customer-friendly tone extends past your initial RFP response, too. As every successful sales rep knows (and as we're about to demonstrate), the key to closing is in the follow-up after you send your proposal.

# Follow-up, follow-up, and follow-up again

Remember how we called the RFP response kind of a like a “first date?” Don’t let that first date be the last one. By delivering timely, targeted responses to every request, you can set the groundwork for a lasting relationship with every prospect who comes calling.

## Be persistent, but be brief

While being persistent is critical, it’s often a fine line between persistence and annoyance. So always be brief and direct in your follow-up: No “how’s it going, just checking in, how’s the weather” nonsense. Instead: “When we talked, we agreed to next step of X; here’s X [or where’s X?]. I’ll call later today. Thanks.”

There’s a time when you can be expansive with a prospect, but that’s not during RFP response follow-up. They’re probably still looking at more responses than just yours, so say what you need to in a few words or a few bullets.

## Put the prospect in control

Let your prospect take the next step wherever you can. Put the ball into their hands. Let them take the wheel. And LISTEN! If it’s true that the customer is always right, then the prospect is right to a degree bordering on genius. Listen, and speak only to empower your prospect to choose the next step.

**But always remember** — you get to decide the general direction in which next steps should be taken. Everyone wants to make their own decisions, and base them on the best information available: let them! Because — as it’s your product or service they’re asking about — you’re the one who is in charge of the aforementioned “best information available.” Which means the next informed steps they choose to take will almost always be in your direction.

## Automate

Finally, and this applies to most every step in the RFP response process, automate as much as possible, because if you have a full pipeline, there's simply too much to track in every deal to get it all done without some software assistance. (You can rest assured that most every competitor in the game is using most every software solution available to improve RFP response times and accuracy.)

Throughout every closing process, a rep is asking themselves questions like, "Did I email them on time? What stage is this deal at anyway? Did I forget anything?" If you're using the proper business tools these questions never need to be asked as they have been answered and addressed via automation. Triggered responses, automated reminders, and electronic signature tools can make RFP follow-up as easy as set it and forget it.

# RFP response technology

As we stated at the outset, it's not easy to create an RFP response (the sales proposal) — along with all the required follow-up — while keeping everything professional in format, content, and writing, and nailing every prospect's every need. It's even harder to do in a competitive marketplace where "if you ain't first, you're last" [Reese Bobby, *Talladega Nights*... so you know it's true].

We have spent the bulk of this whitepaper outlining principles and practices that enable more effective RFP responses, but sales people should also consider the technological solutions that can help codify and optimize your sales proposal processes. Such as CPQ software.

CPQ software, like any proven business technology, delivers straightforward benefits: lower overhead costs with increased productivity. These benefits are fueled by certain features within the software.

## Proposal automation = increased throughput

A CPQ system is built on proposal automation technology, which enables faster delivery of more accurate and professional proposals — put in the aforementioned language of benefits, "increased and improved throughput." This benefit means that you can expect more from each rep on your team and they — if they're using CPQ to its fullest — can enjoy more closed sales and the commissions that come with that.

## Product and pricing configuration = more revenue

Product and pricing configurations are easily the most important content in every RFP response you create, which is why centralized administration of products and pricing is critical to your success. The last thing you want is a rep winging it with pricing in a proposal; conversely, the first thing you want is for all reps to have instant access to your most well-received product and pricing configurations.

With an ability to store information on winning pricing and product configurations — and to make them available across the enterprise — the product and pricing configuration tool in your CPQ system allows each rep to optimize the offer in real-time. The benefit is obvious: larger and more high-value orders.

## Analytics and reporting = faster closing times

Sales analytics, business metrics, reporting, dashboards — whatever you want to call them, this data is typically how managers and executives get an overview of what's happening. In most cases, these kinds of numbers are not something that will help you make adjustments to a sale in progress, but are more for Monday-morning quarterbacking.

But most CPQ solutions enable both macro and micro metrics. The birds-eye macro view is favored by C-level executives. But micro analytics let you take a closer look at individual pipelines and see where the bottleneck may be so that you can keep not one, not some, but ALL proposals moving forward, closing more sales faster.

In the end, you could enjoy a success story in RFP responses simply by following the principles and practices outlined in this whitepaper (one more time: formatting, content, writing, and follow-up). But when you support those best practices with the proper business technology, you make your RFP response processes into a scalable, repeatable, and endlessly successful story.

*For more information on how you can improve your RFP response process, contact iQuoteXpress at (818) 765-3149 or sales@iquotexpress.com*