
Overview

This standard focuses on preparing proposals and quotations for customers. The preparation of proposals involves identifying your customer's requirements and matching them with the objectives and requirements of your organisation. Proposals need to include sufficient detail of the products and/or or services to be provided and timescales. A proposal or quotation is expected to conform to your organisation's house-style. The proposals need to be competitive and to have any necessary conditions and constraints built into them to protect the interests of your organisation. This standard is for sales professionals who develop sales proposals and quotations.

**Performance
criteria**

- You must be able to:
- P1 ensure that the prospect's or customer's requirements are fully understood and that all issues requiring clarification are resolved before the proposal is finalised
 - P2 identify the conditions and constraints which need to be included within the proposal in order to protect the organisation's interest
 - P3 establish and develop the content of the proposal in house style, including essential information about and descriptions of the products and/or services being offered, price and terms and conditions of sale
 - P4 ensure that the proposal is based on a sound understanding of market factors
 - P5 provide the required level of detail as briefed by the prospect or customer and supply the proposal within the agreed time-scales
 - P6 consult marketing and finance colleagues to ensure that the price reflects the value within the proposal and gain internal approval before it is submitted
 - P7 submit the proposal to the customer or prospect on time and follow it up with and appropriate offer of further clarification and information if that is needed
 - P8 ensure that confidential information is stored effectively and protected from misuse

Knowledge and understanding**You need to know and understand:**

- K1 legal and ethical issues relating directly to sales proposal writing
- K2 sources of market data that will support the development of proposals and quotations
- K3 the organisation's procedures for developing proposals and quotations
- K4 how to identify the prospect's or customer's needs and how to deliver the best solution
- K5 how to produce a document that sells the organisation's products and/or services, and stands out from their competitors
- K6 how to set out a clear business case to the prospect or customer in both qualitative and quantitative terms, including key milestones and checkpoints relating to the delivery of the products and/or services
- K7 how to convince the prospect or customer of the benefits of adopting the company's solution to their problem
- K8 how to create customised proposal templates that reinforce and become part of the organisation's corporate identity
- K9 how to keep the proposal customer-focused
- K10 how to improve the chances of proposals being read and responded to by key decision-makers
- K11 how to gather customer testimonials and credibility statements where appropriate to support the proposal

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Suite	Sales (2013)
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