

The 13-Step Checklist for Creating a Winning B2B SaaS Proposal

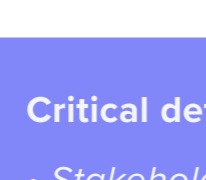
The most effective sales proposals are all about the customer, their pain points, and how you'll solve their problem.

Here's an easy-to-follow checklist to help your reps plan and deliver the winning proposal on their next deal.

STEPS 1-3

Pre-Proposal

Organize Key Details • Speed Up Your Workflow • Design With Intent

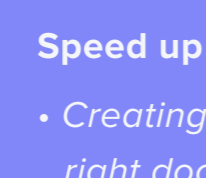


1. Organize Key Details

Compiling the information you'll need upfront makes it far easier to write an effective proposal. Integrating your CRM and proposal software helps save time and ensure accuracy.

Critical details to gather include:

- Stakeholders and primary decision-makers
- Their desired budget
- The problems they're trying to solve
- Their procurement process
- Other options or vendors they're considering



2. Speed Up Your Workflow

The longer it takes to deliver a proposal, the greater the risk of the deal falling through. The less of your proposal that you'll need to create from scratch, the more time you'll have to focus on the details that have the greatest impact.

Speed up the writing process by:

- Creating, approving, and sending proposals from one tool so that everyone is working on the right document
- Using templates that cover different situations and clients
- Pulling from preapproved sales and marketing content



3. Design With Intent

Proposal design isn't just about looks. It's about how effectively the key details are communicated. Poorly designed proposals can be confusing, hard to read and fall to move prospects to act.

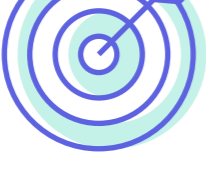
Your proposal's layout, typography, and imagery should:

- Work in unison to strengthen your message
- Give the prospect a sense of who you are, what you can do for them, and why they should buy from you
- Be optimized for viewing on multiple device types

STEPS 4-9

Drafting Your Proposal

Focus on the Buyer • Highlight Your Solution • Make it Engaging and Interactive
Make it Actionable • Clarify Your Message • Watch Your Tone



4. Focus on the Buyer

Have you ever met a prospect who has read an entire proposal? Neither have we. Proposals are most effective when they focus the buyer's limited attention on the issues that matter most to them.

Make your proposal more relevant to your prospect by:

- Grabbing their attention right away with a high-level overview of their problem and how you'll solve it
- Digging deeper into their pain points and demonstrating that you understand their unique challenges
- Prioritizing the flow of your proposal around the buyer and their needs, not your company

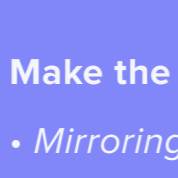


5. Highlight Your Solution

It's critical to tell the price/value story in a way that involves the buyer in the process. The easier it is for prospects to see exactly what they're getting, the less of a deciding factor price may be.

Accentuate the value you'll deliver by:

- Detailing the specific results your prospect can expect
- Defining the project goals, outcomes, and targeted key performance indicators
- Outlining your approach to solving their challenges, the key deliverables and process involved, and the proposed time frame

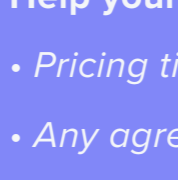


6. Make it Engaging and Interactive

Prospects want a transparent buying experience and to feel like they're in control of their own choices. B2B proposals should feel as transparent and frictionless as the best online consumer shopping experience.

Make the purchase easier by:

- Mirroring a seamless ecommerce experience
- Having a central place for features, pricing, proposal details, and signatures
- Making it possible to quickly navigate to the most important parts of the proposal



7. Make it Actionable

The purpose of a proposal is to leverage deal momentum and make it easy to commit to a purchase. Your proposal should include everything the buyer needs to commit to the deal right away.

Help your prospect take the next step by including:

- Pricing tiers, feature breakdowns, and a self-serve quote builder
- Any agreement details that are needed to move forward
- An e-signature and online payment option



8. Clarify Your Message

Traditional B2B proposals tend to bog the prospect down with obscure language and unnecessary jargon. Straightforward language is far more effective and persuasive than technical jargon.

Make it easier for prospects to say yes by:

- Writing clearly and concisely
- Using straightforward, everyday language
- Keeping your message simple and focused on them



9. Watch Your Tone

Your message's voice and tone can have a tremendous impact on how well products resonate with your brand. The more consistent your brand voice, the easier it will be to earn your prospects' trust.

Examples of brand voice include:

- Professional
- Educational
- Empathic
- Conversational
- Irreverent

STEPS 10-11

Before Sending Your Proposal

Get Approvals • Proofread and Polish



10. Get Approvals

Customized proposal terms often require internal feedback and approval before submission. Be aware that approvals are a common bottleneck that may delay your deal.

To ensure that your proposal gets signed off quickly:

- Use preapproved templates and content whenever possible
- Be sure that internal stakeholders understand the deal details and any unique conditions
- Set a clear deadline request for internal review



11. Proofread and Polish

Mistakes like pricing errors, a misspelled company name, or outdated product information can leave a bad impression—or even sink a deal. Even small mistakes and miscalculations in your proposal can create a negative impression.

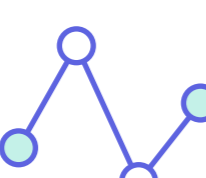
Before you send your proposal:

- Ensure that key elements like technical details, deal terms, and deliverables are correct
- Proof for typos and grammatical errors
- Ask a coworker to review with a fresh pair of eyes

STEPS 12-13

After You Send Your Proposal

Monitor Engagement • Plan Your Follow-Up Strategy



12. Monitor Engagement

Real-time metrics and engagement alerts show you exactly how prospects are interacting with your proposal—helping you follow up more effectively by giving you direct insight into their behavior. Static PDF and slide deck proposals hide buyer engagement and offer no visibility into what's resonating.

Set up alerts to know:

- When a prospect opens your proposal
- How often they look at it
- How much time they spend reading it
- Any parts that they skip or skim over
- Which sections they view and spend the most time on



13. Plan Your Follow-Up Strategy

Proposals and quotes are a critical step to closing the deal, but they won't do all the heavy lifting on their own. The more dynamic and interactive you can make this step of the sale, the higher the chances you'll be able to help your buyer move forward with the purchase.

Increase your chances of winning the business by:

- Offering to walk the prospect through your proposal in real-time
- Scheduling a follow-up meeting to go over your proposal's details and address any questions your prospect may have
- Having multiple follow-up approaches in your playbook ready to go based on your prospect's response and interaction with your proposal

Need to Close Deals Faster?

FastSpring's interactive quoting tool makes it easier to control, manage, track, and close deals—boosting sales productivity and accelerating the sales cycle. All while delighting your buyers every step of the way!

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