Mastering the MSP Proposal

Your guide to creating a sales proposal that will encourage prospects and drive profits

Salesbuildr

Streamlining your sales strategy

No matter how strong your technical knowledge or how effective your IT solutions, if your MSP cannot perfect your sales process then you will always struggle to be profitable. One of the most important stages of the sales pipeline is the creation and pitching of your proposal.

An effective MSP sales proposal will have a range of impressive benefits for your MSP, encouraging prospects, shortening the sales cycle and making the onboarding process far smoother.

In this guide, we will unpack crucial tips and tricks that will make MSP sales proposal creation more efficient and effective. We will explore:

- What a sales proposal is and why it is important for MSPs
- Elements to include in an MSP sales proposal
- Features that make a strong MSP proposal
- Key advice to remember when drafting a proposal
- How Salesbuildr aids the proposal process
- And more

What is an MSP sales proposal?

A sales proposal is a document which helps to propel the sales process, confirming the content of your previous negotiations and outlining what to expect from your future partnership. Your proposal should not only demonstrate a clear understanding of your clients' needs and desired business outcomes, but also recommend specific solutions, highlight Return on Investment (ROI) and emphasise what differentiates you from your competitors. It is likely that this document will be your first interaction with many clients or stakeholders, so it is vital that you create a strong, professional first impression.

A sales proposal is more than just a quote, it is a complete presentation of your value as an MSP. Investing time into the creation of your sales proposals is important as these documents are drivers of action, ultimately moving you closer to closing deals and transforming prospects into clients. If you would like to nurture a successful sales pipeline, mastering the art of the sales proposal is essential.

What should you include in an MSP sales proposal?

Structuring your MSP's sales proposal properly is important. There are several elements that you should include in your proposal to make it convincing and effective.

So, what should be included in your sales proposal?

Executive summary

An executive summary helps to introduce your MSP to your prospects, highlighting exactly how your company can resolve client pain points.

Plan of action

A sales proposal should explain how your MSP intends to implement its services, including approximate timelines, milestones and SLAs.

Social proof

Including social proof such as testimonials from existing clients helps your prospects to clearly see the value of your MSP's services.

Service details

This section provides details about the key services your MSP offers. In other words, this section explains exactly what you are selling.

Unique selling proposition

In the increasingly crowded MSP market, it is important to use your sales proposition to differentiate yourself from your competitors. Including your USPs is an effective way to do this.

Additional materials

It can be helpful to attach supplemental materials to your sales proposals. These could include contracts which help to progress the next step of the sales process.

Benefits

Your sales proposal should include a demonstration of how your services will benefit your prospects, explaining exactly how your MSP will aid a business' IT.

Costs

Ensure that you include a breakdown of your service costs in your proposal. It can be helpful to use a report or chart to demonstrate your pricing options.

Call to action

The end of your sales proposal is an opportunity to inspire the next stage of action. Including a clear CTA helps to move your sales pipeline along.

Features that make up a strong MSP sales proposal

Now that you understand the crucial elements to include in your sales proposal, you should turn your attention to how you intend to write it and the features you want to include. The following six elements are benchmarks of a strong MSP proposal that will encourage conversions and move prospects further along the sales pipeline.

Personalisation	Outcome focused	Various options
All of your prospects will have unique business aspirations and face different challenges. As such, it is important to tailor your proposal to your specific audience, to ensure that your prospects feel that their needs are being accounted for. You can use the same basic template, but you need to alter language and specific details to match your customers' expectations. You should reiterate previous discussions, including context, pain points and desired outcomes to ensure that your prospects feel heard and understood.	You should focus your MSP sales proposal around the outcomes that prospects will see as a result of your services. Be sure not to detail the specific details of your IT solutions and services without explaining the benefits for the end user. You should instead centre your proposal around quantifiable offerings and how you will help your prospects achieve their specific goals.	You need to ensure that you do not limit your profitability by centring your proposal around a single sales option. Instead, you should provide a range of different service options at different price points. This allows your prospects to choose the service that best suits their needs. If one option is unsuitable for their specific requirements, they can consider your other offers rather than turning to your competitors for different service options.

Forward thinking	Avoid technical jargon	Clear terms
As an MSP, you should want to encourage and foster long-term business relationships that can offer you a recurring retainer. Equally, your prospects are unlikely to want to frequently switch their IT provider as this causes operational disruptions. Therefore, it is important to establish that you are committed to creating a robust and reliable partnership with your prospect, and can be relied upon both now and in the future.	You want your sales proposal to be accessible and understandable for your prospects. Therefore, it is important to not fill your proposal with IT jargon and specific technical details of your solutions. Instead, present your IT services in clear and concise terms, helping to avoid any unnecessary confusion.	Clearly establishing the terms of your service is an essential part of your sales proposal. Before you work with a prospect, you should lay out the services you intend to provide, your available working hours, the devices and machines you cover and your fair use policy. Transparency is crucial: if you charge additional fees for certain services or out of hours support, it will be more beneficial in the long term to highlight this early.

5 key tips and tricks to enhance your sales proposal

As your sales proposal is your MSP's first chance to make a positive impression on prospects, it is essential that you optimise and enhance it as much as possible. Following these five tips will help to ensure that this document is as effective and impactful as possible.
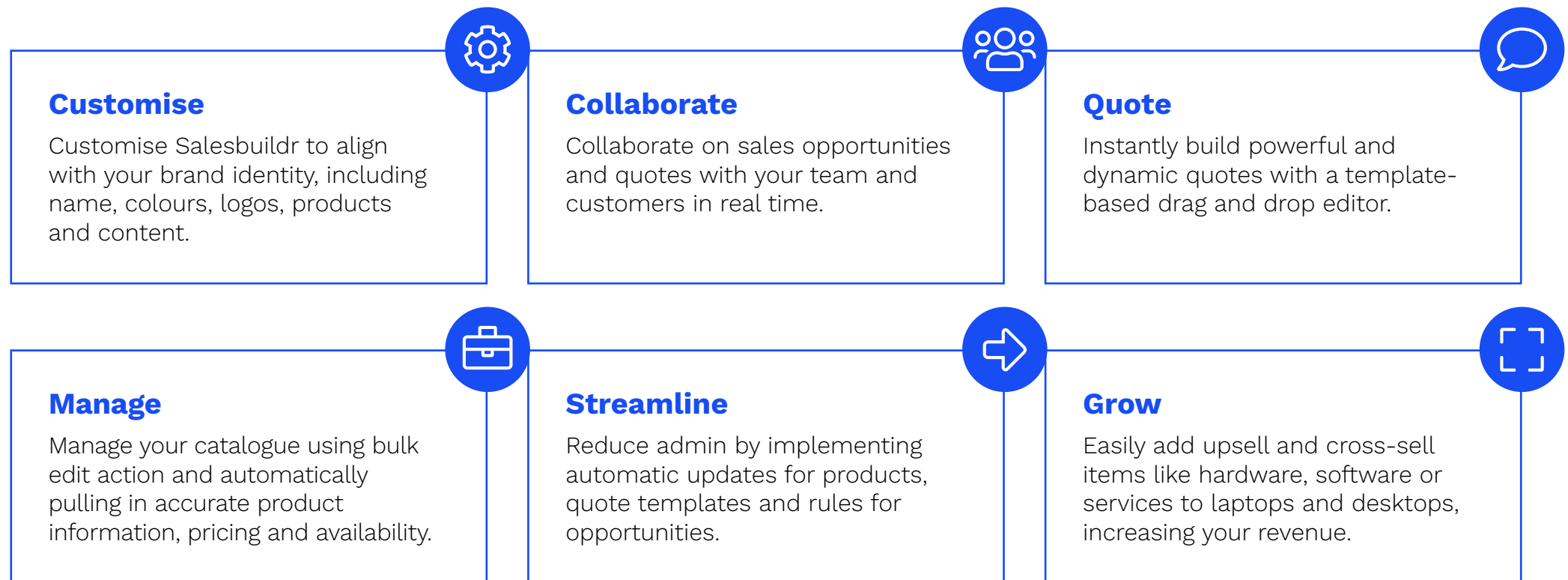
1. **Keep it concise.** Your sales proposal should be detailed, but not overloaded. Four or five pages should be more than sufficient to express your MSP's value.

2. **Promote the personal.** Your proposal should be focused on resolving your customer's specific pain points and delivering their desired business outcomes. It should be centred around them, rather than around the attractive qualities of your MSP.

3. **Persuade, persuade, persuade.** At its core, a sales proposal is a persuasive piece of writing. Ensure that you use the right tone of voice for your audience, use a clear structure and avoid meaningless buzzwords. The most effective persuasive sales pieces are based on factual advantages for prospects.

4. **Accuracy attracts.** Ensure that the content in your proposal is up to date and accurate. Leave time for reviewing and editing your document before you send it, particularly if you are repurposing from a previous proposal.

5. **Use visual aids.** It can be effective to break up your written content with graphics, visual aids and white space. Ensure that you adhere to your brand guidelines when doing this so that your MSP appears professional and cohesive.

Transform your MSP proposal with Salesbuildr

Consistently demonstrating understanding of client needs, providing dedicated assistance and offering a personalised, unique experience are key elements that help to drive customer retention and loyalty. Salesbuildr has a range of innovative tools and capabilities that allow you to offer an enhanced customer experience, delivering faster, more personalised services and more informed answers to queries.

Salesbuildr is a web-based quoting tool and self-service storefront for MSPs, allowing you to quickly create high-converting quotes, automate cross-sells and upsells, and reduce tedious and repetitive tasks by 80%.

Customise

Customise Salesbuildr to align with your brand identity, including name, colours, logos, products and content.

Collaborate

Collaborate on sales opportunities and quotes with your team and customers in real time.

Quote

Instantly build powerful and dynamic quotes with a template-based drag and drop editor.

Manage

Manage your catalogue using bulk edit action and automatically pulling in accurate product information, pricing and availability.

Streamline

Reduce admin by implementing automatic updates for products, quote templates and rules for opportunities.

Grow

Easily add upsell and cross-sell items like hardware, software or services to laptops and desktops, increasing your revenue.

Perfect your proposal process

Are you looking for a solution that will make quote generation more efficient and assist the creation of your sales proposals? Salesbuildr is the innovative solution you need to encourage prospects, close deals and drive profits.

Start your free trial with Salesbuildr today, discover how to build the perfect MSP proposal and start delivering a truly modern
sales experience.

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