

PROPELLER

Deal Review Learnings

This outline provides valuable tips from the Senior Leadership Team to guide you as you navigate through the entire proposal process. It covers key findings and insights around creating and submitting proposals, steps to take after submission, and strategies during engagements to secure future opportunities.

Proposal Process



Building a Proposal

Guidance on pricing strategies, partnerships, extensions, and crafting a strong proposal.



Deal Review

Bring deals that are >\$500k in front of SLT for a review. Valuable insights will be provided ahead of engaging with the client.



Submission

Tips before, during, and after pitching the proposal to the client.



Follow Up

The significance of feedback, identifying potential warning signs, and strategies to maintain strong engagement.



During Engagements

Guidance for optimizing engagement, documenting key details and observations, and prioritizing in-person meeting attendance.



Engagement Ends or Extends

Recommendations including collaboration with sponsors, engaging the Senior Leadership Team, and developing actionable plans for next steps.

Tips for Building a Proposal



Focus on the Ask

When presenting the different options for support, emphasize the option they initially requested more clearly so it stands out more amongst the others.



Value

Depict the value to completing the work; show the consequences of not moving forward (examples: losing momentum, additional cost in the long run, etc).



Exposure

Build a proposal even if the current ask is not a good fit. This can give them exposure to the way we are thinking and how we work for potential future engagements.



Terminology

In tech proposals, terms like “enablement experts” or “agile activation” resonate better than “change management,” which some buyers find off-putting.



Simplify

Simplify the work portrayed in the proposal to be less of a lift for business owners. Make the work more palatable and accessible.



Collateral

More technology forward materials with both an industry and practice lens and codify tech & tool expertise where appropriate.

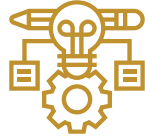


Pricing, Extensions, and Partnerships



Think Ahead

Including a travel budget in the contract allows greater onsite presence, strengthening client relationships through happy hours and workshops while paving the way for future opportunities.



Include Incentives

Incorporate incentives or discounts within longer contracts to offer an upfront investment in the partnership.



Perks

Consider including complimentary services for NBD clients as a value-added bonus, ensuring rates remain unaffected.



Partnerships

For managed service PMO partnerships with prominent firms, it's preferable to manage projects internally and outsource selectively, rather than collaborate with external personnel. Partnerships require clear boundaries and strong governance.



Vendors

When it comes to implementation vendors, be proactive with introducing a potential model at the beginning so more research can be done to find the right partner.



Extensions

For extensions, we collaborate with sponsors to build a business case they can share internally, focusing on a compelling narrative that avoids criticism of specific teams.



Submitting a Proposal



Showcase

Increase engagement during the sales process to demonstrate our approach and mindset. This could involve interactive workshops or incorporating collaborative discussions. This approach not only highlights our expertise but also fosters stronger connections with clients early in the relationship



Schedule time

Set up time immediately after presenting or if the clients know us well, schedule the follow up meeting while you are in the proposal.



Feedback

Ask for feedback regardless of the outcome. This provides us with valuable insights into areas for improvement, helping with future approaches. Even a loss can be a great juncture for growth and relationship building.



Following Up After the Proposal

Utilize Salesforce

Set reminders in Salesforce to follow-up ten to twelve weeks post lost deal to stay engaged.



Warning Signs

If the client limits interaction with us or limits our access to others within their organization after a proposal, it is essential to reevaluate and reassess the situation, as this often indicates underlying concerns or challenges.



Set aside time

Dedicate a handful of hours that serve as a “support” phase for major deals to stay engaged with the work and tee up future opportunities.



Relationship Building

In cases where the client goes dark, focus on building the relationship beyond the proposal to keep the conversation going.





During an Engagement

01

Team Restructuring

When a client considers disbanding a team, we can recommend retaining key high performers, offering mentorship to demonstrate our commitment to organizational success and highlight our value as partners.

02

Targeted Workshops

When there are escalated project issues that remain unaddressed, stressing a need for conducting targeted workshops versus casually mentioning.

03

Nurture Relationships

Cultivate additional connections further up and down the decision chain to enhance their familiarity with Propeller and strengthen our organizational reputation

04

Involve SLT

When there is a shift in client priorities or impending disengagement from an engagement.