



# 13 Tips

## to Master Your Next Proposal Presentation



RAIN Group

# Introduction

As one of the final steps on the way to closing a sale, getting the proposal presentation right is essential to answering lingering questions, demonstrating impact, and connecting with decision makers.

While there are several things to keep in mind for the presentation itself, just as important is the preparation you do before the meeting. Asking key questions of your buyer and working with your internal team will give you the edge you need to outshine your competition.

Done well, a proposal presentation builds rapport, deepens trust, and serves as an experiential sample of what the buyer will get if they choose to work with you.

Use the 13 tips in this slide deck to build your confidence and increase the chances that your next proposal presentation results in a win.



Source: *Virtual Selling Skills and Challenges*, RAIN Group Center for Sales Research

*Before the Proposal Presentation*

# 01. Know the players

You should ask your champion or key contact about the meeting participants on their side. Focus on what they'll want to hear and how they'll want the conversation to go.

A big thing to figure out is the desired balance between presentation/monologue and dialogue/collaboration. If you can't get this information, prepare a blend of monologue and dialogue. And be ready to calibrate as you go.

Note that dialogue will typically be better than monologue. Most people feel more connected to, and more inclined to go with, sellers who lead a good conversation and don't just talk for an hour.



*Before the Proposal Presentation*

## 02. Do some sleuthing

Remember, *you* are never the star of your presentation—the *buyer* is! Make sure you know what'll resonate with them both in terms of what you say and how you say it.

Look up presentation participants using LinkedIn, Google, and other research tools. Make note of professional activities, publications, awards, and so on. And keep in mind that most buyers will be looking you up before the meeting, too, so make sure you project professionalism and have the right messages of value on your public profiles.

Get our LinkedIn Checklist, 15-Day Challenge, and LinkedIn for Sales Guide.

[DOWNLOAD NOW](#)



*Before the Proposal Presentation*

## 03. Define your roles

Define the roles of the presentation team. Someone might play the emcee in delivery. You might have three area experts. You might bring a support team to introduce and build rapport.

Three leaders often mean there are no leaders. If it's clearly you, great. But if there could be others, ensure there's one person in charge of making sure everything comes together and holding others accountable. Whatever the roles are, make sure they're clear.



*Before the Proposal Presentation*

## 04. Involve everyone

If multiple people are coming to the presentation, everyone has to say *something*. Often, buyers will mention after presentations that they didn't pick one of the providers because one team member was too dominant and everyone else was too silent.

One person may talk the most, but everyone has to have some role if you bring them, even if it's just introductions and after-meeting chat.



## 05. Ask about logistics

You have to know all the logistics—the timing, meeting location, participant locations, technology, and so forth—to make sure the meeting runs smoothly. Find out if the meeting is live and if anyone will also be joining virtually. If you have printed or physical materials, you'll want to email them to remote attendees in advance.

Know how much time is allotted for the meeting and other logistics, such as hard start/stop times, set-up time, tech checks, etc. If the meeting is entirely virtual, make sure you know which technology platform you'll be using. If you have the option, use yours. You're used to it, and you'll have more control over the process.



## 06. Dress the part

Your outfit is part of the planning. Find out how formal or casual the buyer's culture is. If you're presenting to a major financial services firm with a white-shirt-and-suit culture, you won't want to show up to deliver in jeans and a polo because you'll lose the sale before you even start talking. On the flip side, if you go with the suit at some tech companies, you might just turn off people used to a more casual atmosphere. Whatever the case, know your buyer.





*Before the Proposal Presentation*

## 07. Present well

Make sure presenters have the general capability to command a room. If they don't, and the presentation is critical, have someone else present.

If the person presenting isn't world-class, practice the delivery in-house with overly critical attendees. Let the presenter make mistakes and correct them before the meeting when it's safe—not in front of the actual buying team.



## 08. Be strategic

Not every finalist presentation is a competition against others, but they usually are. If you're facing competition, find out who they are. *Ask.* If your buyer won't tell you, and you have a champion inside the organization, ask them discreetly.

If you can't find out who the competition is, you often can find out about the presentation timing. If all presentations are on same day, it's usually best to go first. Research shows that, on the same day, whoever goes first is the benchmark that everyone else is judged against, and they're remembered most. It's called the **primacy effect**.

If presentations are on different days, it's best to go last. As time passes, people will remember—and feel most connected to—the final finalist presentation. This is the **recency effect**.



*During the Proposal Presentation*

## 09. Build rapport

Attend to the basics of good meeting etiquette. Extend greetings. Make eye contact. Break the ice. Be prepared to chat a bit to establish a connection with people. Have a few conversational tidbits at the ready to share. This can help “warm up” your buyers and establish feelings of camaraderie and trust.

[Learn to build rapport in sales →](#)



*During the Proposal Presentation*

## 10. Start on the right foot

Lead the transition into the agenda and kick off the meeting. Share an introduction that includes why you're meeting and sets expectations. It's not unusual for meetings to go awry when people don't know why they're there—or think they're there for different reasons.

You might also get their input by asking if there's anything in particular they'd like you to address by the time the presentation is done. The more you know, the more you can tailor the discussion to their agenda and desires.



*During the Proposal Presentation*

## 11. Invite participation

Set the stage for buyers to be active participants in the process, not passive listeners. Ask them to dive in with thoughts and questions at any time. And be sure to confirm the time available. That way you can adjust to any changes, whether that means early departures or even additional time.

Before you begin your presentation, once again invite interruptions or questions to make it a conversation. Yes, you want to get your points across, but the best discussions often aren't linear and don't involve you talking at the buyer. If you're interrupted, you'll know buyers are engaged.



*During the Proposal Presentation*

## 12. Be persuasive

It's one thing to know your impact model. It's another to be able to communicate your point of view and impact convincingly.

Can you tell a **Convincing Story**? Can you shake up the status quo with provocative questions? Can you see how what you're advocating for will affect the rest of the buyer's business? Sellers who aren't prepared to influence buyers and present persuasively have a difficult time getting results.

Learn to lead persuasive conversations and deliver compelling presentations.

[DOWNLOAD NOW](#)



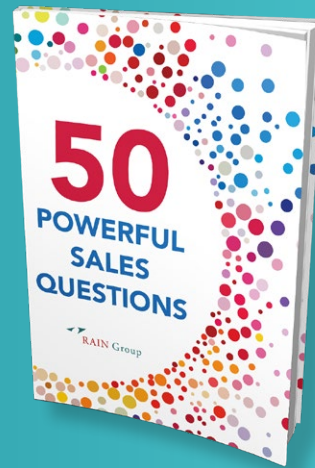
*During the Proposal Presentation*

## 13. Share stories

Case studies can be critically important in helping you close the sale. Use previous customer examples— anonymized or in aggregate if the data is sensitive or proprietary—to illustrate the positive impact of your product or service. Showing similar impact through case studies and stories builds credibility and belief you'll deliver what you say you can. The stronger you can make your case, the more likely it is that you'll close the sale.

Get 50 powerful questions to help you lead valuable, effective sales conversations.

[DOWNLOAD NOW](#)



# 13 Tips to Master Proposal Presentations

Use these tips as a roadmap to your success across the sales cycle.

## BEFORE THE PROPOSAL PRESENTATION

1. Know the players
2. Do some sleuthing
3. Define your roles
4. Involve everyone
5. Ask about logistics
6. Dress the part
7. Present well
8. Be strategic

## DURING THE PROPOSAL PRESENTATION

9. Build rapport
10. Start on the right foot
11. Invite participation
12. Be persuasive
13. Share stories



# Turn Your Team Into Insight Sellers

The landscape of buying and selling has changed more in recent years than it has in preceding decades. Buyers are more sophisticated and have unlimited research and resources at their fingertips. Plus, in the current environment, more buyers are working remotely and facing increased distractions.

RAIN Group's Insight Selling training gives sellers the skills they need to capture attention, strengthen relationships, differentiate from their competition, and win more sales.

It's designed to balance learning and application so your sellers aren't out of the field too long, plus it's contextualized for your business and the sales situations your sellers regularly face so it's immediately applicable on-the-job.

Your team will learn to:

- Inspire buyers with ideas that matter to them
- Use cognitive reframing and disruption questions to open buyers' minds to new ideas
- Tell a Convincing Story that intrigues buyers, shapes their thinking, and drives the buying and selling process forward
- Craft breakthrough solutions that create new possibilities
- Lead executive-level conversations that shape buyers' agendas for action

[Click here to request a complimentary consultation](#) →



## RAIN Group Delivers

### World-Class Sales Training

- Modular, multi-modal, and purpose-built for the **modern learner**.
- Unique approach to driving **behavior change** through training that we call Execution Assurance.
- Focused on driving the **business results** important to you.
- A **transformational experience** that ensures the development, adoption, and implementation of new skills.
- Action-oriented **coaching** prepares sellers for real situations and provides direct feedback.

# RAIN Group Unleashes Sales Potential

We help organizations:

- Enhance sales capability with award-winning sales training
- Design and execute strategic account management initiatives
- Increase effectiveness of sales management and coaching

**Best IP:** We study buying and selling relentlessly through the RAIN Group Center for Sales Research. Our research and field work allows us to create industry-leading intellectual property to help our clients achieve the greatest success.

**Best Education System:** We use the best education approaches, methods, and technologies to make training work, stick, and transfer to the job.

**Best Results:** We make it our mission to drive value and achieve the highest client satisfaction through excellence in quality and producing transformational results for our clients.



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