SCORE - How to build a proposal that wins deals!

We all know that the insurance industry is one of the most competitive markets to be in. Direct writers and banks are doing their very best to take your customers away from you. Having the right tools to retain, acquire and grow are essential to any Brokerage firm's success.

I'm happy to present "SCORE – How to build a proposal that wins deals!" a course created as much for employers as for employees to provide tools, tips and techniques to build effective word and email submission proposals that create value and win deals!

The main objective of this course is to provide a workshop environment to identify and understand what needs to be in a proposal to a client and how to build it. Participants will be taught how to set up the proposal for maximum comprehension and value creation. Participants will truly understand the secret ingredients in terms of look and language and output.

Build it and they will come!

Course plan: SCORE – How to build a proposal that wins deals!

General information:

- ❑ **Title of this activity:** How to build a proposal that wins deals!

- ❑ **Length:** 2 hours (static online course, webinar) or 3 hours (onsite)

- ❑ **Number of participants:** N/A

- ❑ **Targeted clientele:** Owners and employees who are most in contact with clients negotiating sales and retention.

- ❑ **Training material:** All of the participants will receive a training guide. The facilitator will use a Power Point presentation as a visual support.

- ❑ **Learning strategies:** This course is deployed as an interactive workshop, with several group discussions and how to methodology. The session combines Word & Outlook with sales best practices in order to make it highly practical and applicable to the audience.

Main objective:

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Specific objectives:

At the end of this session, the participant will be able to:

- Use both Word and Outlook to effectively build and submit proposals
- Learn the right graphical set up that appeals to clients
- Learn how to use the appropriate content that creates value for the offer.

Requirements

Participants need to be prepared to work in a Word and Outlook environment, preferably version 2010 or later. Participants will also be required to identify unique aspects of their products and services that can be showcased in the proposals.

Program

✓ **Chapter #1 – Understanding what attracts clients to a proposal**

❑ What do customers want?
❑ How do they want to feel when they review a service offer?
❑ What are the elements that drive the buying process?
  o What information is considered valuable
  o What to avoid in your proposal creation?
  o The flow of information from start to finish
❑ Building multi-functional templates (Home and Auto)
❑ Best practices relating to highlighting the organizations Points of Differentiation
❑ Best Practices relating to driving a positive customer experience when they review the proposal.

✓ **Chapter #2 – Building the ideal proposal in Word**

❑ Important features to know relating to Word when building a proposal

❑ Imbedding graphics into your proposal

❑ Imbedding checklists into your proposal

❑ Appropriate use of tables and other design features

❑ Font size and colour schemes

✓ **Chapter #3 – Getting your proposal setup in Outlook**

❑ Three different sending options:
  o Email from Word directly

  o Word to PDF and attached to an Outlook email

  o Outlook template email

❑ Advantages and disadvantages of each option

❑ Other options in Outlook

  o Using Signatures

  o Using Quickparts