

QUOTING

BEST PRACTICES



3 WAYS TO MAKE YOUR QUOTES INSTANTLY MORE APPEALING

You only get one shot to make a first impression, and the same is true when you're showing your client your proposal for the first time with their quote. The appearance of the quote and what you choose to include, or not include, has a big impact on the success of your sale. We don't just mean whether or not you make the sale. How large was it? What size were your margins? Did you get a repeat, long-term customer with monthly payments, or a one time sale you may never see again?

We see it a lot. A Solution Provider says they lost a deal because they were out-priced by a competitor, or that the deal got whittled down in size and margin because their customer didn't think they needed everything in the solution.

Industry experts agree – your quote may be the cause of these headaches. From breakout sessions and webcasts with industry experts, to seeing best practices in place with our Solution Providers, we've determined three simple ways for you to make your quotes more appealing.





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1 **GET RID OF** PART NUMBERS AND TECHNICAL DESCRIPTIONS

Keep your customer in mind when you are crafting your proposal. The executive-level person you are presenting to likely doesn't want to see the bits and bytes of each element of your solution. Instead, replace the technical descriptions with business descriptions on how that part of the solution will improve their business. You'll win bonus points if you demonstrate you listened during the discovery or assessment.



KEEP
IT
SIMPLE

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2 REMOVE LINE-ITEM PRICING

Pair your line item pricing with technical descriptions and you've crafted the best invitation for your customers to price shop you on Amazon or CDW. Plus, you increase the likelihood your customer identifies the most expensive item on the proposal and decides they don't need it...even if it is the most critical piece of the solution they agreed on.

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3 GIVE THEM OPTIONS, BUT DON'T OVERWHELM THEM

This has the ring of Goldilocks to it, doesn't it? Not too little and not too much. Here's a rule of thumb: if you are quoting financing, stick to two or three options. Providing only one could lead your customer to request more options, just for the sake of having them. On the flip side, give them every option and you risk paralyzing them with too many choices.



CONCLUSION

Remember, you are a trusted advisor for your customers. They expect you to make recommendations for everything: from what technology they need, to what the best financial option is.

Don't underestimate the power your quote has on encouraging them to select the optimal solution. If you follow these 3 steps, you'll win deals more easily, have larger margins, and a foster a better relationship with your clients. Plus, your customers will

be happy having minimum downtime with the best technology that fits their needs on an affordable monthly payment that's easy to budget.

Making your quotes more appealing is now easier than ever. GreatAmerica has integrations with software companies for your quoting tools, find out more here. With only a few clicks, these integrations allow you to simplify your proposals and add monthly payments options.



ABOUT GREATAMERICA

Founded in 1992, GreatAmerica is a national lessor that helps their customers be more successful. The Unified Communications & IT Group at GreatAmerica is dedicated to understanding the IT, Managed Services and Telecommunications industries, working with thousands of telecom providers, MSPs and independent VARs to help them evolve their business.

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