

Unit 36: Developing sales proposals

Unit reference number: A/502/8656

QCF level: 4

Credit value: 5

Guided learning hours: 30

Unit summary

This unit will enable you to provide a valuable service for any company in the sales industry. This is because you will be able to develop and evaluate sales proposals effectively and efficiently for your employers, which will lead to increased profits and an enhanced reputation for your company. This in turn will boost your reputation, which will help you to progress in your career.

You will be meticulous in making sure the customers' requirements are properly addressed, compared with the conditions and constraints which have to be considered to protect your own company's interests; for example making sure the proposals are based on the state of current markets and that the price is consistent with the value of each proposal. You will pay due regard to presenting the proposals in house style and present all proposals within agreed timescales. Where you have queries, you will seek clarification from others and will always obtain approval from your managers before submitting any proposal.

A key part of your role will be to evaluate proposals by getting feedback from people in your company and also from customers. This will enable you to judge whether your proposals have been successful and whether you could make improvements in the future.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

| Learning outcomes | Assessment criteria |
|---|---|
| 1 Understand how to write sales proposals | <ul style="list-style-type: none">1.1 Explain how to write a proposal that differentiates the offer from that of a competitor and promotes organisational strengths1.2 Describe how to put together a persuasive argument based on quantitative and qualitative evidence1.3 Explain the importance of addressing the brief in tender documentation1.4 Explain the importance of using the "house style" in proposals1.5 Explain the legal and ethical issues relating to sales proposals1.6 Explain the client's procedures for submitting sales proposals |

| Learning outcomes | Assessment criteria |
|---|--|
| <p>2 Be able to develop sales proposals</p> | <p>2.1 Ensure the prospect's or customer's requirements are addressed in the proposal</p> <p>2.2 Ensure that all identified issues requiring clarification are resolved before the proposal is finalised</p> <p>2.3 Identify the conditions and constraints which need to be included within the proposal in order to protect the organisation's interests</p> <p>2.4 Present the proposal in "house style"</p> <p>2.5 Ensure that the proposal is based on market factors</p> <p>2.6 Provide the required level of detail as briefed by the prospect or customer</p> <p>2.7 Ensure that the price reflects the value within the proposal</p> <p>2.8 Gain internal approval before submission</p> <p>2.9 Supply the proposal within the agreed timescale</p> |
| <p>3 Be able to evaluate the proposal</p> | <p>3.1 Obtain feedback from colleagues and the customer on the proposal</p> <p>3.2 Evaluate the outcome of the proposal and recommend improvements for the future</p> |

Unit amplification

AC1.1: Explain how to write a proposal that differentiates the offer from that of a competitor and promotes organisational strengths

- *To include:* identify buyer key requirements and any additional requirements; scope of the proposals; competitive advantages solutions and objectives; deliverables; actual proposals; cost breakdown; payment terms; additional terms and conditions; after care
- *Other considerations:* the selling company's background and reputation; sales figures; market niche advantages; staff expertise

AC1.2: Describe how to put together a persuasive argument based on quantitative and qualitative evidence

- *Quantitative:* discounts offered; prices compared with competitors; healthy sales figures; number of satisfied customers
- *Qualitative:* after care service and guarantees; specialist staff; results of customer service surveys; external quality reports or audits; reports in the media

AC1.3: Explain the importance of addressing the brief in tender documentation

- *To include:* type of company and its role; description and type of contract; invitation for an expression of interest; details of the procedure; estimated value, closing date; duration
- *Other considerations:* e.g. have a proposal schedule and work backwards from the proposal due date; leave plenty of time for checking of details; equipment; have back up plans; study evaluation criteria

AC1.4: Explain the importance of using the 'house style' in proposals

- *House style:* helps identify the company; stand out from the crowd; layout for ease of reading; correct use of English
- *Other considerations:* quality of paper used; quality of printing; use of diagrams, tables and images

AC1.5: Explain the legal and ethical issues relating to sales proposals

- *To include:* Acts e.g. Data Protection 1998, Sale of Goods Act 1979; Advertising; Contractual obligations; Consumer Law; Company requirements; Environmental concerns
- *Other considerations:* company reporting guidelines; breaches of laws; penalties to the company if there are breaches

AC1.6: Explain the client's procedures for submitting sales proposals

- *To include:* main needs plus wish list needs; timescale; possible solutions; quality demanded; identification of what the benefits might be; what deliverables are expected; possible pricing; targeted in language the seller understands
- *Other considerations:* linkage with the client's company procedures relating to specific layout considerations; staff involved; confidentiality; track record with competitors