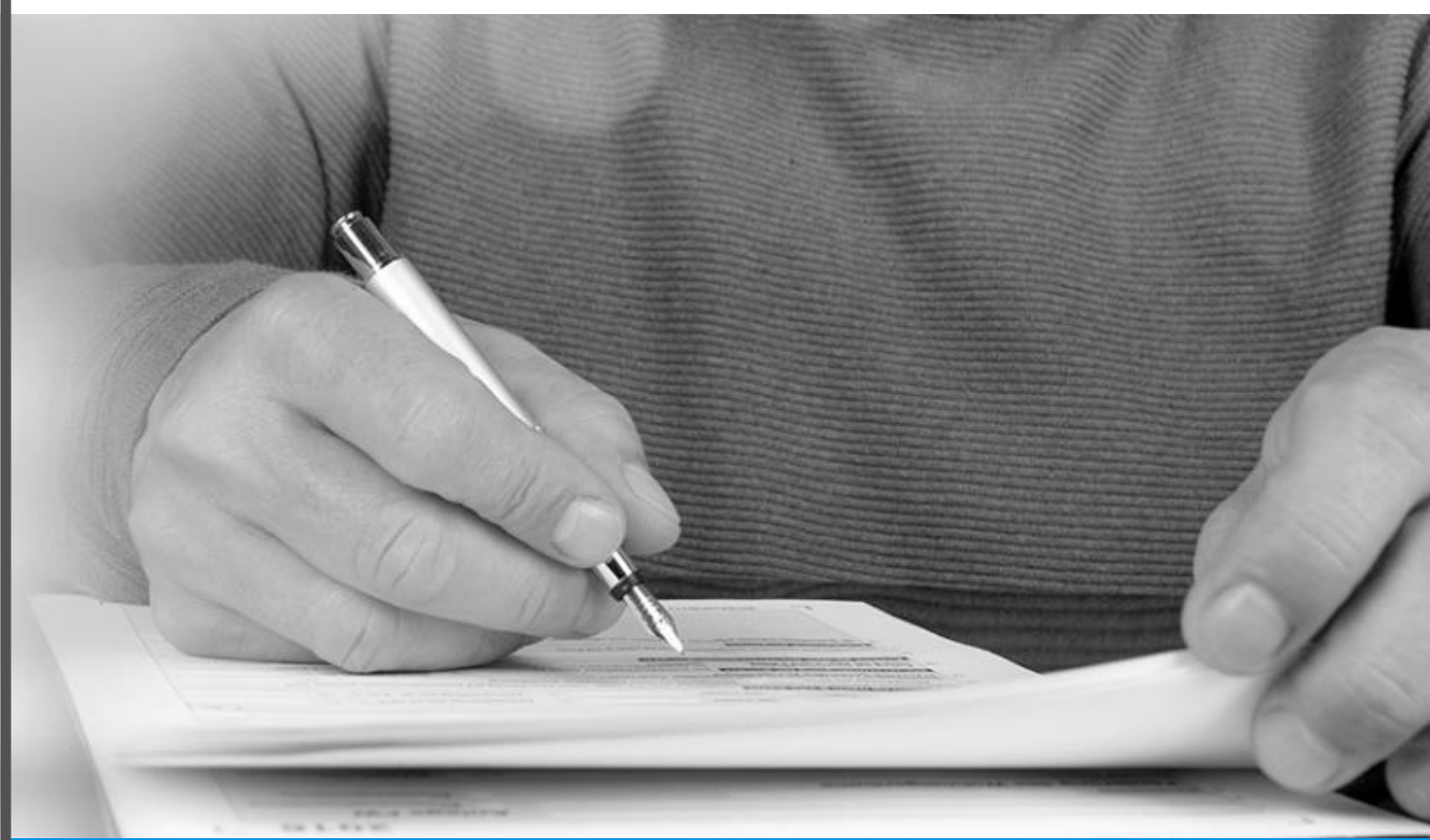


Proposal Presentation Guide



Changing the Closing Experience

As prospects get closer to making their final vendor selection, and a financial commitment, their perception of risk increases. They become harder to access and often stop sharing information. Project risk and cost become their new priority. The greater the gap between their budget expectations and the actual cost of implementing a new business solution, the greater the risk of losing to a low-cost competitor or worse, a no-decision.

Delivering an emotionally charged proposal presentation to the Business Decision Maker (BDM) and Project Lead (PL) in advance of delivering your final solution proposal will help mitigate these risks. This approach enables sales professionals to:

- Place themselves in front of the BDM and PL prior to them deciding on a vendor
- Remind the BDM of their business pains and challenges to ensure they proceed with project funding
- Flush out any last remaining objections PRIOR to submitting a “formal” solution proposal

BDM participation in the proposal presentation session is critical. If you are unable to secure BDM participation in your proposal review your opportunity is likely at risk.

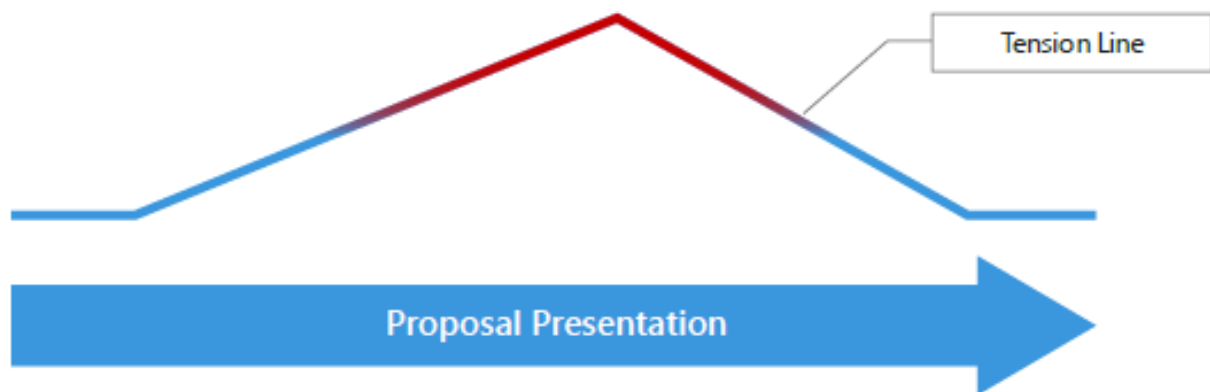
Tips:

- ✓ Do not e-mail solution proposals to prospects. For Depth opportunities, review your solution proposal with the prospect in person. For Accelerated opportunities, review remotely via Skype. For clarity, you want to be present when your prospects react to all aspects of your proposal.

Proposal Presentation Flow & Timing

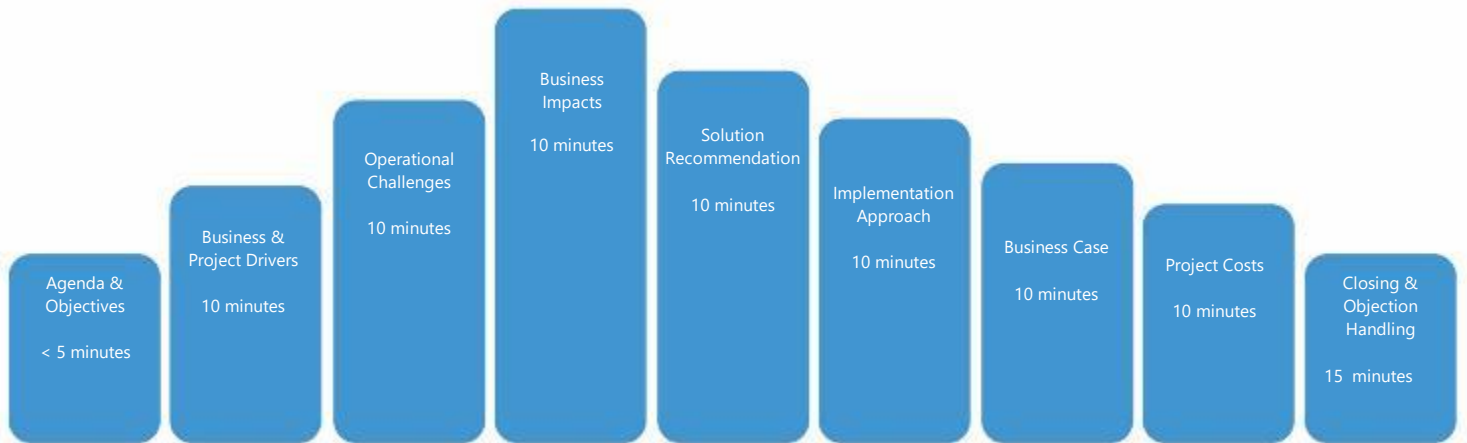
The duration and depth of your proposal presentation will vary based on how much information you uncover during your sales cycles. That said, they should consist of no fewer than seven slides; which cover the core content, and no more than twelve slides if developing additional slides. Proposal presentations developed for Accelerated opportunities should lean closer to seven slides, as they will be delivered remotely via Skype for Business within a forty-five to sixty-minute window. Proposal presentations for Depth opportunities will be delivered in person (most of the time) so can run longer running to ninety minutes.

The first half of the discussion (this is not a stand-up presentation) focuses on WHY the project is strategically important, HOW the business challenges are manifesting operationally, and the IMPACT your prospect's operational challenges have on their key operating and risk metrics. Focusing on your prospect's challenges introduces tension and reminds them of why the project is a strategic priority.

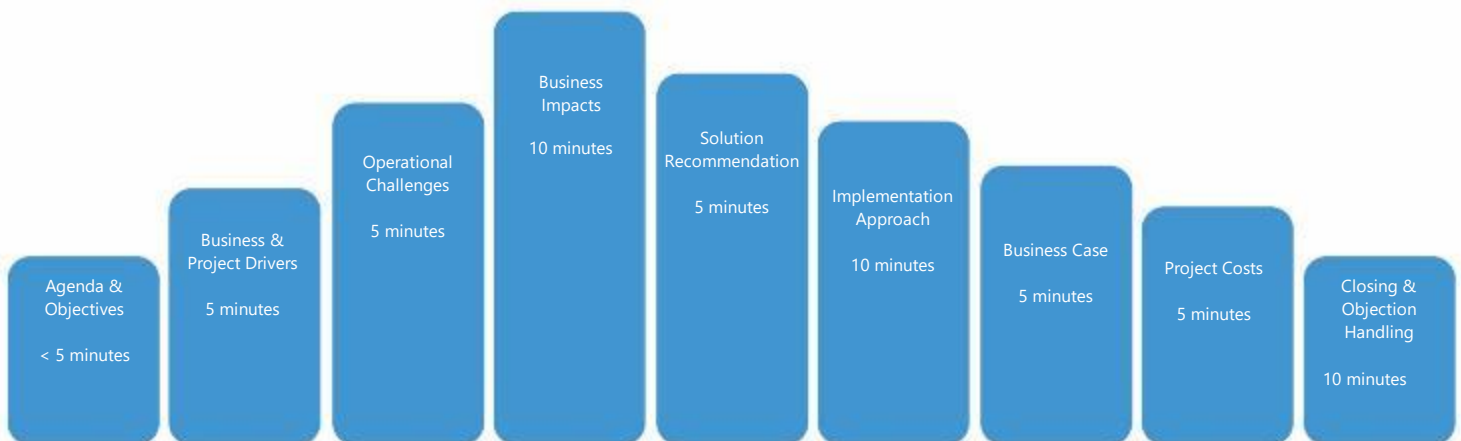


The back half of the discussion focuses on how your recommended solution addresses your prospect's challenges, your implementation approach, the business case and anticipated benefits, as well as the costs. End the session with a clear request for a commitment to proceed. For clarity, DO NOT e-mail the proposal in advance. Focusing on how your organization solves your prospect's business challenges **relieves tension** and lowers the perception of project risk.

Proposal Presentation Guide



Accelerated Proposal Presentation Timing



Depth Proposal Presentation Timing

Proposal Presentation Facilitation

Setting the Stage – Agenda

The opening slide provides a clear vision of the structure and focus of the meeting. Quickly walk your prospect through the flow, then ask if there is anything else they would like to add or review.



Agenda

- Business & Project Drivers
- Operational Challenges
- Current State Impacts
- Solution Recommendation
- Implementation Approach
- Business Case
- Project Costs
- Timeline

Business & Project Drivers:

Quickly review and validate your understanding of the project's primary business and project drivers. Business drivers are typically aspirational, whereas project drivers are primarily operational. Use business/industry language to describe the positive and negative reasons why the project is a prospect priority. As this is your last opportunity to demonstrate your understanding of the prospect's industry and their specific challenges, speak directly to the issues that are most relevant to the BDM.

There are four content categories that resonate with all BDMs; growth, profitability, risk and control. Try to identify at least two business or project drivers for each category. Provide context and reference supporting evidence and examples that you observed within their organization during the discovery process.

Why Now?

Business Drivers

- Market expansion (international) to drive revenue growth.
- Increasing margin pressure from offshore competitors.
- Fluctuating currency exchange rates.
- Increasing regulatory oversight and sustainability legislation (wastewater treatment and OH&S).
- Increase customer satisfaction.

Emotionally charged ("WHY")

- Growth
- Profitability
- Risk
- Control

Project Drivers

- Improve capacity utilization.
- Improve supply chain integration.
- Improve supplier monitoring (quality and delivery).
- Reduce inventory levels.
- Increase inventory turns
- Improve fill rate.
- Improve OTD compliance.
- Improve accuracy and availability of management reporting.
- Reduce DSO.

Operational Challenges

Review and validate the operational challenges behind the project drivers. Organize the operational challenges into business processes and/or logical workloads. Personalize your review of the operational challenges by injecting comments from the prospect's project team or subject matter experts who participated in the discovery meetings. Do not be overly dramatic.

The objective is to confirm your understanding of your prospect's day-to-day operational challenges. Review the content in a matter-of-fact style, then ask the BDM and/or PL to add to the narrative. Ask open and close ended questions to drive clarity. "What have we missed?". "Which of these issues is the most important one to address through this initiative?". Do not discuss the IMPACTs of these operational challenges at this point of the presentation as they will be addressed in the following slide.

Current Operational Challenges

Estimating

- Lengthily estimating process
- Inaccurate production costing

Purchasing & Inventory Management

- Increasing stock-outs of raw materials
- Inaccurate capturing of shop-floor consumption data
- Sales order changes are not automatically flushed through to the supply chain partners

Use prospect language ("HOW")

Scheduling

- Backward infinite" scheduling results in no visibility into production bottlenecks
- Manual (excel) scheduling process

Production

- Production systems not integrated with supply chain partners
- Inability to provide customized products and prototyping at a competitive price/cost

Reporting

- Inability to produce new management reports in a timely manner.
- Limited gross margin visibility.

Current State Impacts

Review and confirm the MEASURABLE BUSINESS IMPACTS resulting from the operational challenges. You CANNOT use this slide unless they have collected the appropriate information during your engagement and discovery process. Aligning the impact metrics with the operational challenges on the previous slide provides consistency, however, there is no "right" way to structure the impact categories. You can organize them by business objectives (project profitability), business processes (cycle-to-cash) or specific functions (estimating). Mirror the language used by your prospect to ensure it resonates with how they see the project.

Executive decision makers typically filter all business value through three filters:

- Money– How are the operational challenges impacting the organization's ability to generate revenue and profit?
- Risk – How do the current operational challenges increase business risk?
- Control – How do the current operational challenges impede the organization's ability to make informed decisions?

Proposal Presentation Guide

The Current State Impacts content is collected throughout the prospect engagement process as it is required for both the Alignment Email and the Demonstration Plan. If you find yourself at the end of your sales cycle without this information, re-engage with your prospect prior to drafting your proposal presentations and solution proposal. Do not make assumptions that have not been validated by the prospect. If you have not collected project impact metrics, delete the slide.

After reviewing the current state impacts, ask the BDM if there are other non-monetary impacts that she feels need to be improved through this project?". Revisiting EMOTIONAL business impact metrics prior to summarizing your solution recommendation increases prospect engagement..

Current State Impacts

Revenue

- Customer churn increased 6% YoY
- Bid win rate is 12%
- Excess capacity being reserved to mitigate increasing stock out risk

Profitability

- Product recalls are 5% of invoiced value
- Gross margin declined 3% due to production inefficiencies
- Customer sales order estimated gross margin is 8% higher than actual gross margin
- Increasing unscheduled overtime
- Freight as % of revenue increasing due to expediting

Risk

- Order fulfillment rate has dropped to 87%
- Failed safety audit triggered \$50K penalty

Control

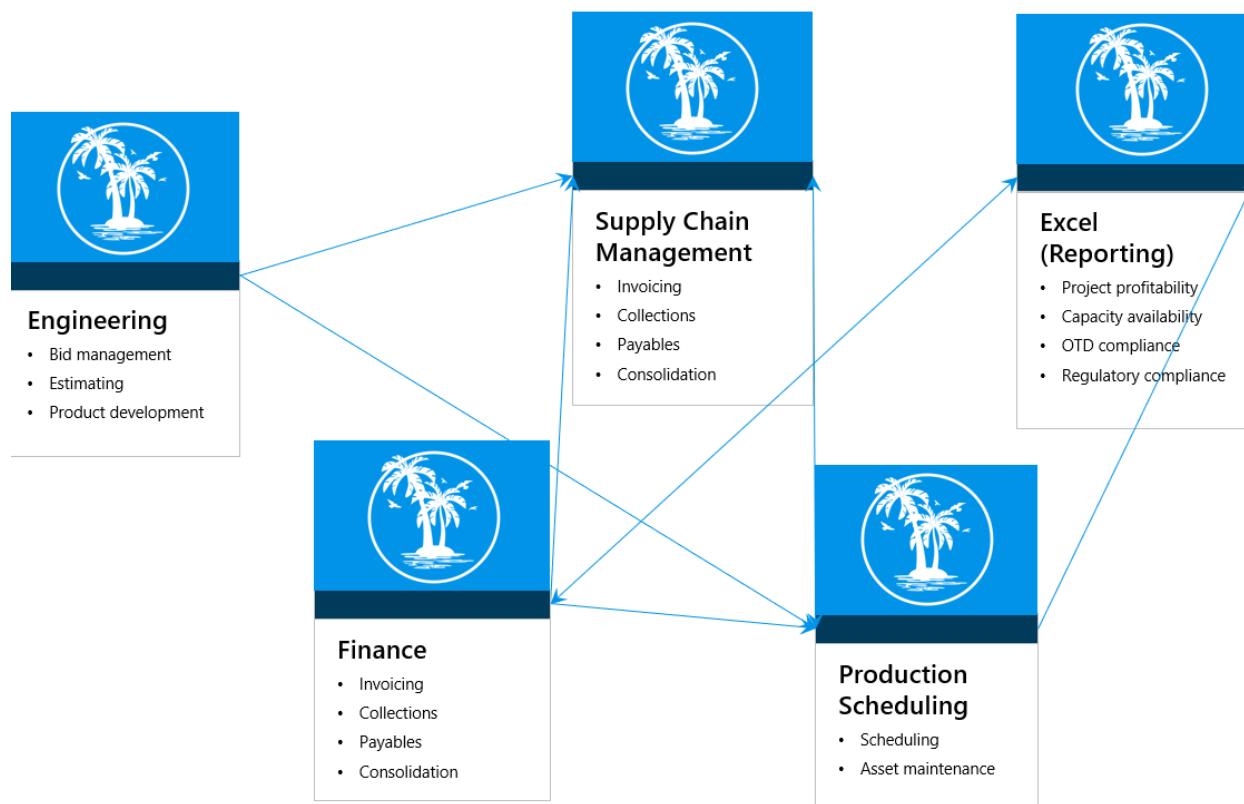
- No visibility into individual product and project margin contribution.
- 24 hours to produce a custom report (and limited ability to access reports remotely)
- DSO is averaging 74 days

Impacts must come directly from your prospect.

Current State Visual

If appropriate, anchor the root cause of your prospect's business challenges in a visual metaphor. "Islands of information" is a cross-industry example that demonstrates the common cause of many organizations' siloed business processes. Use industry specific images.

Islands of Information



Solution Recommendation

Use capability language to summarize your solution recommendation. Do not simply list modules or add-ons. Link the primary capabilities to specific operational challenges and their associated benefits. Paint a clear comparison between your pre-configured industry approach and your prospect's current collection of disparate applications. Reinforce the key capabilities that address your prospect's core business challenges. Your primary focus should be on your own industryspecific IP.

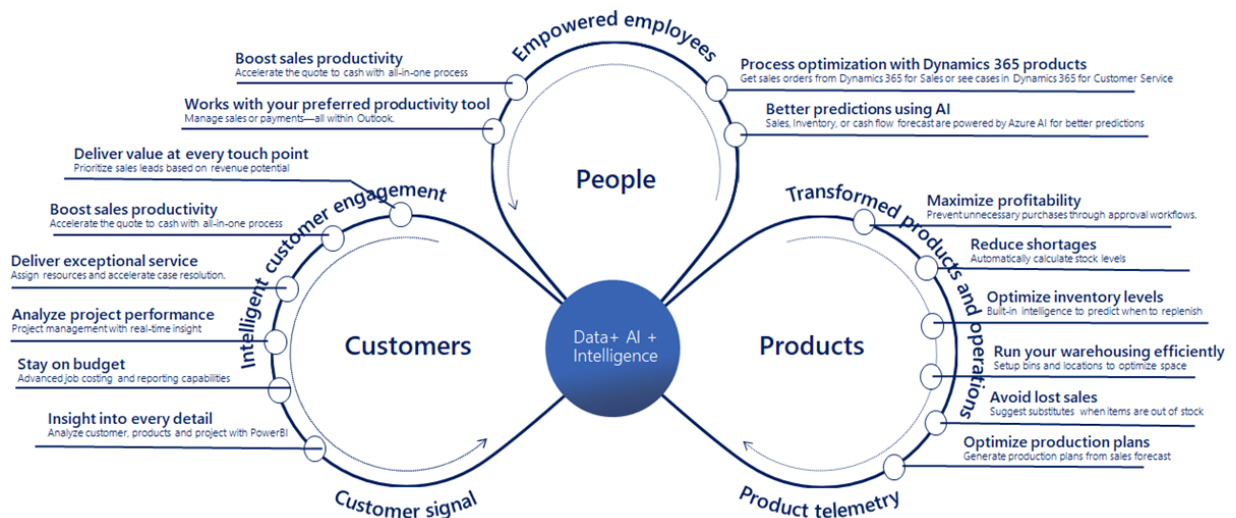
Proposal Presentation Guide

Tips:

- ✓ As you have already provided a solution demonstration or facilitated a trial, keep the solution recommendation overview brief. Tell them a detailed solution description is included in the solution proposal, which will be forwarded at the end of the proposal presentation.

Financial Management
Production
Supply Chain Management
Project Performance Mgmt

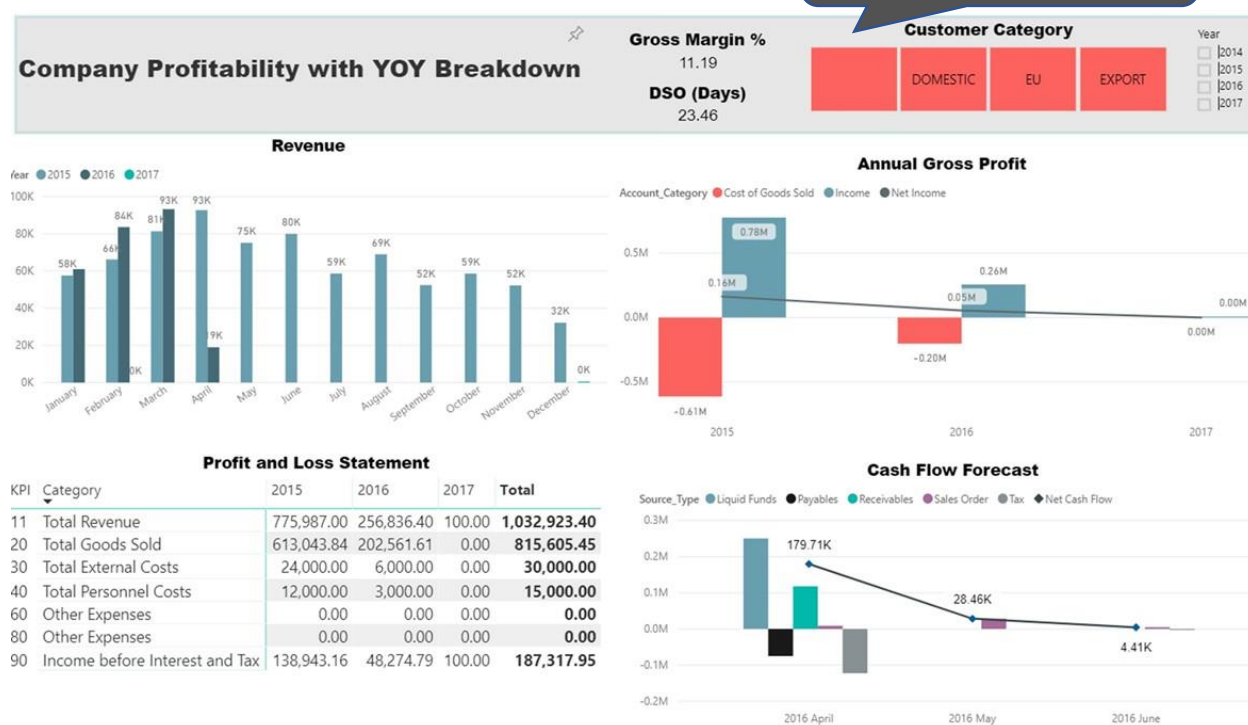
Inventory Forecasting
MRP
Warehousing
Distribution/Shipping



Emotional Insight

Present and review a dashboard, report or solution image that you feel will have the greatest impact on the BDM. What information do they not have today? What keeps them from making better business decisions? The image MUST provide the data or insights that address or remedy at least one of the current state impacts. Briefly review the dashboard or report contents, then reference the associated business challenges and impacted operating metrics. You want to provide a visual depiction of a critical aspect of the business the BDN cannot currently control.

Back in Control



Implementation Approach

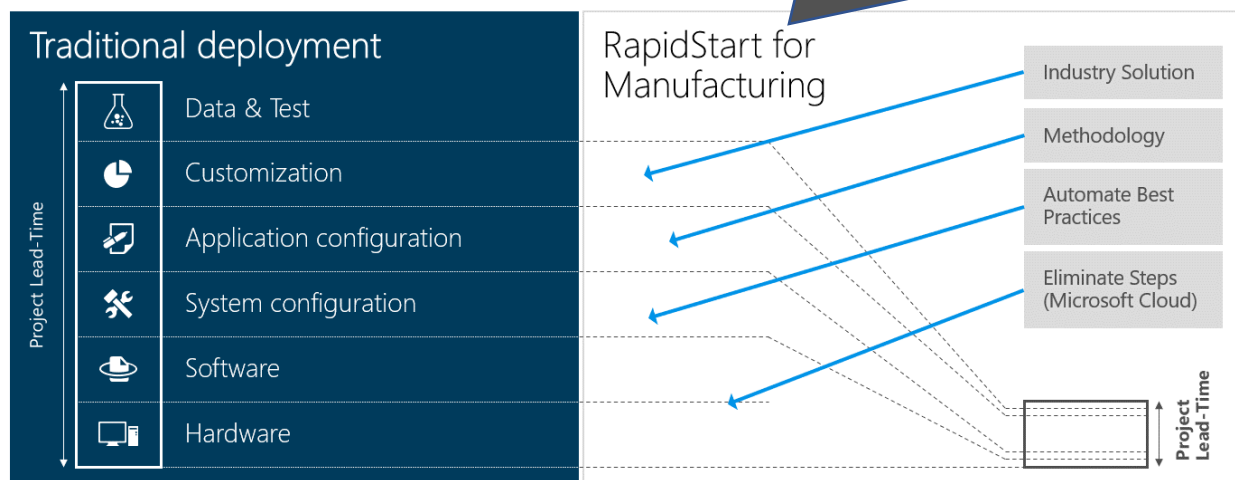
Describe your project approach, plan and high-level timeline. Speak specifically to how your industry-optimized approach reduces project risk, removes costs and accelerates time-to-value.

If you are focused on an industry, vertical or defined workload, describe the tools you have developed to minimize the data conversion and integration effort (risk), as well as any pre-configured business processes or reports that lower costs and increase immediate value realization.

Rapid Implementation Approach

Accelerated Time-to-Value

Focus on low risk, minimal disruption to business and speed to benefit.



Anticipated Benefits

Review the anticipated business case and project benefits that were uncovered during your discovery process. Include all benefits (measurable and otherwise) the prospect shared with you during the engagement cycle. Reference the specific solution components that will enable the benefits. An example of this is “web-based time entry enables consultants to enter their time on a daily, rather than weekly or bi-weekly basis, resulting in a 1.5% increase in billable time, which drops straight to the bottom line.”

This is VERY difficult information to extract from prospects. Collecting it early in your sales cycle to populate your alignment email and demonstration plan is critical. The closer your prospect gets to a decision, the less strategic information they will share.

Focusing on a specific industry, vertical or workload makes it much easier to collect this information. If you are familiar with your prospect’s key operating metrics (and industry averages) you can map them back to the project drivers and operational challenges.[]

Tips:

- ✓ Use this opportunity to validate your solution proposal at the closing of this slide by asking the BDM "Are there any other benefits you feel should also be included?"

Business Case

Higher profitability

5% capacity utilization improvement realized through finite capacity planning capabilities resulting in a gross profit increase of \$7.4M.

\$175,000 reduction in expedited freights costs

Lower labor costs

50% reduction of unrecoverable unscheduled overtime required to meet On-Time-Delivery commitments due to stock outs - \$390,000 per year.

Reduced Inventory

\$450,000 inventory reduction (raw goods) based on improved data capture at point of receipt and consumption.

Improved estimating

25% reduction of total engineering hours associated with new project estimation

Improve bid win-rate to 30%

Increased working capital

Fewer invoice disputes/returns

Lower inventory levels

Improved decision making

Capacity utilization and availability

Production order variance analysis

Production order status

Project profitability

Only use Economic Benefits that have been validated with the prospect

Cost Summary

Provide a brief overview of the licensing costs and options. Make a clear recommendation and keep the content simple. The more information you provide, the deeper the BDM will dig into the numbers.

Project Costs

Proposal Element	Users	One-Time Fee	Monthly Subscription
Microsoft Dynamics 365 Business Central Premium - Manufacturing	30		\$3000
Microsoft Dynamics 365 Business Central Team Members (read & approve, reporting, employee self-serve)	50		\$400
Microsoft PowerBI (executives & management)			\$350
Partner IP Manufacturing Insight Manager, Visual Scheduler and Estimating Workbench	30		\$450
RapidStart for Manufacturing Implementation		\$50,000	
Partner Optimization Services & Support			\$800
Total		\$50,000	\$5,000

Commitment to Proceed

Review your prospect's desired project go-live date. Describe the dependencies and supporting activities that need to be completed to accomplish their implementation objective. Link the importance of the go-live date to either the rhythm of the prospect's business cycle or the realization of business benefits.

Review the logistics involved in meeting the go-live date, then clearly ask for a commitment to proceed with a signed letter of engagement. The purpose of the direct ask is to flush out any remaining hidden objections or concerns that were not addressed during the presentation. If the BDM is not yet prepared to award the project to a vendor, confirm there are no outstanding concerns about your organization's ability to help them achieve their project objectives and anticipated benefits.

Project Costs



Go-Live Date

Project start date

Prospect resource requirements & timeline

Preparation activities

Contracting considerations

Respectfully ask for a commitment to proceed. Wait patiently for the prospect to respond.

Closing Sequence Example

"Based on everything that I've shared with you today, do you feel comfortable moving forward with <partner name> implementing your new manufacturing system?"

If the BDM is not prepared to make a commitment, (because there are other vendor proposals to review), follow up with a second probing question to determine if there are any hidden objections.

"Given your understanding of our solution and industry experience, do you have any concerns about our ability to help your organization achieve the business outcomes that we reviewed today?"

If the probing question results in a legitimate objection, follow the objection handling model to flush out the outstanding concerns (fears).

After delivering your proposal presentation, make any required adjustments to the content, then convert the PowerPoint into a PDF and forward it to the BDM and PL.

Transition Questions

Whether you facilitate your proposal presentation remotely or in person, it is critically important to consistently engage the BDM and PL throughout the entire session. This engagement confirms the information being presented is accurate AND flushes out objections as they surface.

Proposal Presentation Guide

To ensure your meeting does not turn into a one-sided presentation, your audience needs to be engaged after each focus area or “slide”. Do not move from one topic to the next without first asking a **transition question**.

For example:

- What would you add to this list now that you are at the end of your discovery process?
- Have we missed any significant project drivers or business objectives?
- Which of these operational impacts do you feel is the most critical to address immediately?
- Do you agree with the impact assumptions your team shared with us?
- How would your organization behave differently if they had these capabilities?
- What business case elements have we missed?
- Are the economic impacts accurate?
- Are there other non-monetary project impacts that we need to understand?
- What have we missed?
- Is there anything you feel we need to know before we send over our solution proposal?

Transition questions force the BDM and PL to confirm or comment on each of the core discussion areas. This keeps them fully engaged throughout the proposal presentation facilitation and allows for further discovery prior to sending your solution proposal. Assume there are ALWAYS hidden or unspoken objections at the end of EVERY sales cycle.

Conclusion



If you know in advance that all your sales pursuits will end with a BDM proposal presentation, and you understand what information needs to be collected to inform the discussion and populate the slide deck, then you will drive an engaging and effective, business-oriented sales cycle. If you get to the end of your sales cycle and discover you do not have the impact metrics and business case elements required to deliver an emotionally engaging closing conversation, it will be too late to go back and collect it. The door will be closed, and you will unfortunately be left with a functional (how) oriented proposal and value proposition. Starting with the end in mind is the key.



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