Web Proposals
– a Modern, Professional Choice

By Jenny Stork

XAIT

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The way buyers view quotes has changed, have you adapted?

In today's extremely competitive marketplace, constantly finding ways to improve your customers' buying experience and making sure it is as easy as possible has never been more important. Your proposal is a significant factor in the early stages of a buying process, and often where first impressions are formed.
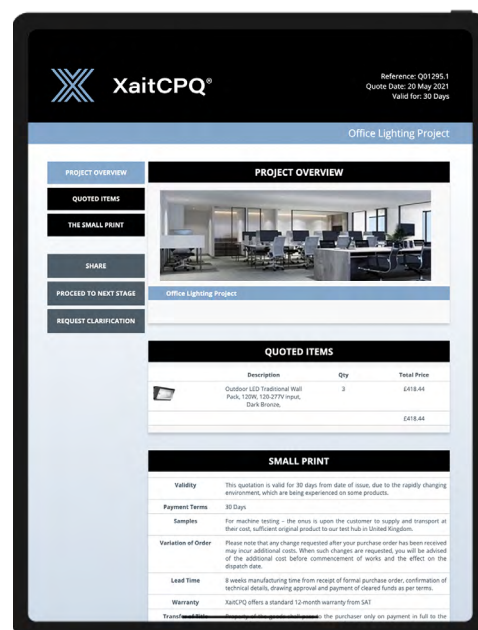
In 2020 the number of emails that are opened and read on a mobile device increased from **60% to 81% compared to the previous year**. This ultimately means we can expect buyers to first view a proposal on a mobile device as well, and in doing so creating a good first impression with your proposal becomes increasingly more important.

In other words you should aim not only to be the first to respond, but the first one that it viewed as intended and creating a great first impresssion. The outcome will be increasing the probability that you will beat the competition and win the deal.

Of course, price will always be a key decision factor, but perceived value around reliable service, a trusted brand, and professionalism should never be underestimated. Customers are often prepared to pay a little extra for these benefits, which give peace of mind, and a web proposal can make all the difference in getting this message across.

Just like a company website, which is increasingly seen as the shop window for an organisation, a web proposal forms early impressions about your company and can be a shop window, too.

Static PDF documents are no longer complementary to your website, where customers are increasingly moving to a more efficient self-serve style of buying through advancing digital technology. The next generation of proposals, giving your customers an easier way to buy from you, is here.
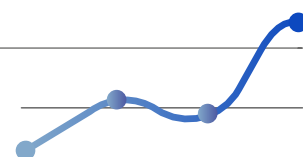
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Did you know? [1]
The number of emails that are opened and read on mobile devices are as high as

81% ▲

What is a Web Proposal?

A web proposal is simply a web page that is automatically created using quote data in your CPQ system. You can customize the content within the proposal, and add links, videos and branding.

The weblink could be included in your proposal covering email, making it instantly more visible than an attachment at the end of the email. The web proposal will contain the usual product and price information requested, but there is so much more that can be presented in a digestible format.

Increase Sales Revenue

Links to landing pages that show additional product options, interactive ROI (Return on Investment) calculators provide significantly more upsell opportunities, all in one convenient place.

Increase Conversion Rates

The use of case study videos, product explanation videos and useful product-related links to further information provides everything your potential customer needs to know for faster decision-making.

Streamlined Acceptance

An automatic "place order" feature enables instant acceptance of the proposal for a fast and efficient customer experience. This has the potential to improve sales performance and increase profit, since it makes you much easier to buy from.

Reference: Q01295.1
Quote Date: 20 May 2021
Valid for: 30 Days

Reduce the chance of your proposals containing erros with standarized and customized content such as reference, date and validity

Add branded material such as customer logo and branding or attach video, product brochures, case studies and more

QUOTED ITEMS

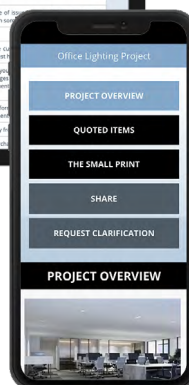Easy and sleek navigation that makes it easy to scope out relevant information and to take you to different parts of the proposal

PLACE ORDER

Give your customers a fast and efficient experience with direct placement of orders that really streamlines acceptance

Customize or Standarize

Reduce errors and professionalize your proposal with the possibility to both standarize and customize content such as reference, date and validity.

Excellent Consistency

Ensure company standards and branding principles with already branded web proposals, no need to spend time on formatting, fonts, colors and sizes.

Improve Conversion Rates

Usage statistics such as open rates and time spent in different areas of the proposal help you understand the level of customer engagement with your web proposal. You can also know what links, videos or upsell content were viewed and for how long. Increased customer insight often leads to improved conversion rates.

The web proposal is an opportunity for your organization to become easier to buy from. Speak to us today about how this can be implemented in your CPQ system so you can increase your sales revenue and conversion rates.

Want to also become more effective at producing documents?

XaitPorter is a cloud-based solution that provides complete control over the document production.

DISCOVER MORE
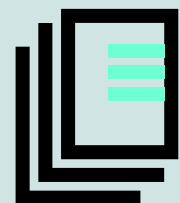
Source:

[1] Campaign Monitor: https://www.campaignmonitor.com/resources/guides/email-marketing-trends/

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About the author

Jenny Stork
Customer Success Manager
Xait Ltd

Jenny Stork is Customer Success Manager at Xait. She brings over 20 years' experience in B2B retail electricity. She has delivered real value to the business through the development of a competitor insight toolkit for the sales force, cultural change management, internal communications improvement, process development and project management.

Furthermore, she has valuable customer experience and insight gained through developing bespoke solutions and delivering value to the business through successful complex negotiations.

Become easier to buy from

Quickly and accurately price combinations of interdependent products and services.

Xait helps organizations with complex pricing options maximize revenue and drive cost and risk from their sales process.
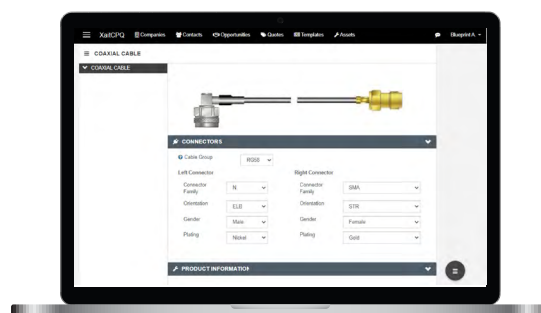
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