EOS Core Process: Proposal and Presentation Development

Process Owner: [Person from EOS Accountability Chart]
Last Updated: [Date]
Review Date: [Next quarterly review date]

EOS Integration

Connected EOS Tools:
Related EOS Rocks: [Current quarter Rocks that improve this process]
EOS Scorecard Metrics: [Weekly numbers tracked for this process]
Accountability Chart Connection: [Which seat owns this process]

Process Overview

Purpose: To create customized, compelling proposals that clearly demonstrate value and address specific customer needs, while maintaining consistency in messaging and accelerating the decision-making process.

High-Level Steps

1. Requirements gathering and confirmation
2. Solution design and customization
3. Proposal document creation
4. Internal review and approval
5. Presentation preparation
6. Proposal delivery and presentation
7. Follow-up and next steps
8. Proposal tracking and optimization

Core Process Detailed Steps

Step 1: Requirements Gathering (60 minutes)
- Schedule dedicated requirements call
- Review all discovery notes and qualification data
- Confirm specific needs and success criteria
- Identify any new stakeholders or requirements
- Document must-haves vs. nice-to-haves

Step 2: Solution Design (45 minutes)
- Map solution features to specific pain points
- Customize offering to their business needs
- Identify implementation approach
- Determine pricing structure and options
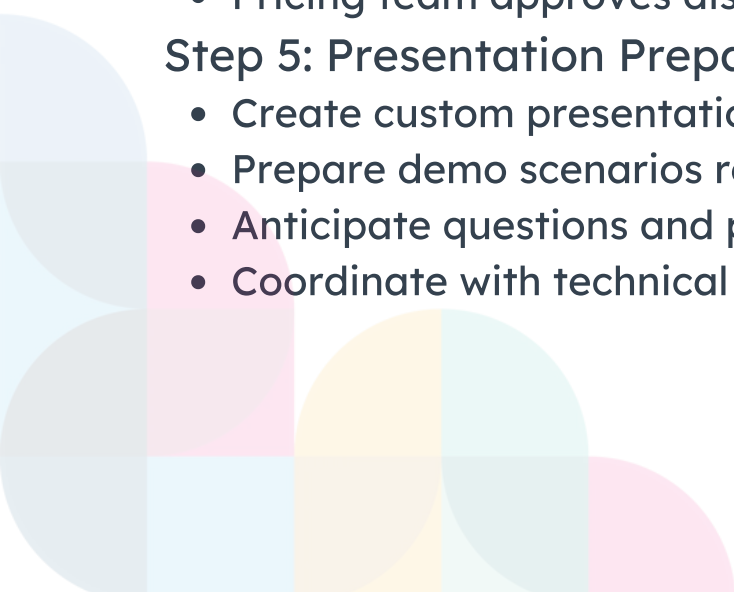- Consider any integration or technical requirements

Step 3: Proposal Document Creation (2-3 hours)
- Use approved proposal template
- Include executive summary with key benefits
- Detail solution components and implementation
- Provide clear pricing with multiple options
- Include case studies or references relevant to their industry

Step 4: Internal Review (30 minutes)
- Sales manager reviews for accuracy and positioning
- Technical team validates solution approach
- Legal reviews terms if needed
- Pricing team approves discount levels

Step 5: Presentation Preparation (45 minutes)
- Create custom presentation deck
- Prepare demo scenarios relevant to their use case
- Anticipate questions and prepare responses
- Coordinate with technical resources if needed

Core Process Detailed Steps (cont.)

Step 6: Proposal Delivery (60-90 minutes)
- Present key points, don't read entire proposal
- Focus on value and ROI, not just features
- Include interactive demo or proof of concept
- Allow time for questions and discussion
- Confirm understanding and interest level

Step 7: Follow-up Actions (30 minutes)
- Send presentation materials within 2 hours
- Document all questions and concerns raised
- Provide any additional information requested
- Schedule follow-up meeting before leaving

Step 8: Proposal Tracking (15 minutes weekly)
- Monitor proposal engagement if using tracking tools
- Follow up on timeline commitments
- Update CRM with all activities
- Escalate if no response after agreed timeframe

Quality Standards & Success Metrics

Must-Have Standards:
[ ] Standard 1 (measurable)
[ ] Standard 2 (measurable)
[ ] Standard 3 (measurable)

EOS Scorecard Metrics:
Weekly Metric 1: [Target number]
Weekly Metric 2: [Target number]
Monthly Metric: [Target number]

Accountability:
- Account Executive: Owns entire proposal process, client communication
- Sales Engineer: Provides technical validation and demo support
- Sales Manager: Reviews proposals over $X value
- Marketing: Provides case studies and collateral support

Frequency:
- Requirements call within 2 days of qualification
- Proposal delivered within 5 business days of requirements gathering
- Follow-up touchpoints every 3-5 business days until decision

Sample Success Metrics (adjust for your team + create Scorecards):
- Time from qualification to proposal delivery (target: <5 days)
- Proposal-to-close conversion rate (target: >30%)
- Proposal acceptance rate (target: >60%)
- Average time from proposal to decision (target: <14 days)
- Customer satisfaction score on proposal quality

Process Connections

Receives From: [Which EOS core process feeds into this one]
Hands Off To: [Which EOS core process this feeds into]
Dependencies: [Other processes or resources needed]

Tools & Resources

Required Systems/Tools:

Tool 1

Tool 2

Template/Document links

Training Materials:

Link to training video

Link to detailed SOPs (if needed)

Onboarding checklist

Troubleshooting & Common Issues

If [Problem], Then [Solution]:

Problem 1 → Solution 1

Problem 2 → Solution 2

Problem 3 → Solution 3

Escalation: [When to involve process owner or leadership team]

Process Improvement

Last Quarter's Improvements: [What was changed and why]
Current Issues to Address: [Items for next EOS Rock or Level 10 discussion]
Issue 1
Issue 2

Ideas for Next Quarter: [Potential improvements to consider]

Approval & Sign-Off

Process Owner Approval: [Name + Date]
Leadership Team Review: [Date reviewed in Level 10 or quarterly]
Next Review Date: [Align with EOS quarterly cycle]

Quick Reference Card

[One-page summary of key steps for daily use]

The 5 Key Steps:

[Step 1 summary]
[Step 2 summary]
[Step 3 summary]
[Step 4 summary]
[Step 5 summary]

Key Metrics: [2-3 most important numbers to track]

Emergency Contacts: [Who to call if process breaks down]