

Winning The Quote and Order Game

Outside selling has often been characterized as a “quote and order” process. That seems to be particularly true in the early stages of building a relationship with a customer. The first perceived “victory” for many salespeople—and for the owners and sales managers they work for—is the opportunity to present a quote and have it considered against the prospect’s current printing and/or copying source.

I’m not sure that I always agree that “winning” an opportunity to quote is much of a victory. I’ve seen too many cases where quoting was an exercise in futility; where the job would be quoted on a completely unsuitable piece of equipment (long-run 4/C process on a small format 2-color press), where the only chance of getting the job hinged on having a lower price than the cheapest printer in town, or where the job in question wasn’t “real” in the first place. (“Here are all the things we buy. Give me a quote on all of them.”) Do any of those situations sound familiar?

Quoting is part of the reality of selling though, and there are times when gaining the chance to quote really does represent what I call a “little victory” in the selling process. It’s a “little victory” because it hasn’t made anyone any money yet, but it is something a salesperson can build on.

Two Parts

There are actually two distinct parts to your side of this “quote and order” process: Quote Delivery and Quote Follow-Up. *Quote Delivery* simply refers to the mechanism by which you put your quotation or proposal into the prospect’s hands. And *putting it into the prospect’s hands* is meant as a literal statement. There will almost certainly be cases in your selling where you’ll communicate a price to a prospect verbally first, either for speed or for some other element of convenience. But you should make it an ironclad rule to follow up with a written version of your quotation. *Putting it in writing* is the most professional way to deliver a quotation, and it offers the further benefit of protecting you against any misunderstanding later on.

Your written quote should clearly state: (1) the specifications of the project, (2) the price you’ll accept for completing the work as described, and (3) your terms and conditions.

Many printers have developed special quotation/proposal forms. Sometimes, that’s combined with computer pricing software that generates each quote in a pre-determined format. Depending on your own situation, it may be less complicated—and no less professional—to simply develop a quotation format to apply to your regular letterhead.

There is no single right way to do this, but there are at least minimum appearance requirements. Ask yourself: “Does this written expression of my quote on this job project the image I want to project. Does it identify me as a professional, quality-driven printer? Does this *document* speak to the prospect and say ‘You can trust ABC Printing’ to get the job done right?”

Dressing It Up

You might consider is “dressing up” your proposal even further. For example, a quotation presented in a pocket folder inside a specially printed 9" X 12" envelope could be seen as being even more professional, and would also give you a natural means to package appropriate enclosures, such as a cover letter, a high-impact statement of your guarantee, samples of similar work to what you’re quoting on, and testimonial letters from current customers. Since there’s an added cost to presenting a quotation in this way, you might limit these “best-dressed” proposals to especially high profile prospects or projects.

As for getting your written quotation physically into the hands of the prospect, there are several possibilities. In order of impact, those possibilities include: (1) hand delivery, (2) overnight express courier delivery, (3) postal delivery, and (4) e-mail or fax.

It should be easily understandable that certain quotes will “perform” better if delivered with greater impact. And nothing says “I want to do business with you” more clearly than a personal trip to hand-deliver a quotation or proposal. Again, though, there is a cost involved in making a high-impact delivery—in time, money, or both. The best advice is to spend that time and/or money when it will really work to your benefit. Save the time and/or money if the situation is routine, or if there’s no clear benefit to be seen in a higher-cost, higher-impact presentation.

Three Possibilities

Putting your quotation or proposal in the hands of the prospect is only the first part on the “quote and order” challenge. From that point, one of three things will happen. The three—and *only* three—possibilities are: (1) you’ll

get the job with no further activity on your part, (2) your quote goes into “consideration,” or (3) your proposal is immediately and irrevocably rejected

It would be nice to think that you’ll get a significant number of the jobs you quote on with no further effort on your part, but that’s not a very reasonable expectation. The very nature of the quoting process assumes that there’s a *competition* going on, and here’s something you have to understand: If the situation is that you are quoting with a prospect for whom you’ve never done any work, *you are automatically the underdog in the competition!*

Why is that? Because the printer or printers who *have* worked with this prospect are known quantities. Remember that *trust and confidence* in the printer is the single most important factor in the buying decision. You are still an unknown quantity, at least to the extent that you’ve yet to prove your worth on a real, live job to this particular prospect.

But remember this too...the underdog wins his or her share of competitions, especially when he/she recognizes the dynamics of the situation and does what’s necessary to *out-compete* any other printer involved, including the prospect’s “regular” printer. (More on that in a moment.)

The least desirable of the three possibilities is that your proposal is immediately and irrevocably rejected. That will be unhappy news, certainly, but if it is the case, you’re better off knowing it sooner than later. One of the worst things that can happen to a printing salesperson—or any other salesperson in this sort of situation—is to exist for any length of time as a “prisoner of hope”.

That refers to the situation where you have a couple of very nice quotes or proposals out, and since you’re “sure” that at least one of them will result in an order, you slack off on your efforts to generate still more business. Later on, if you find that none of those quotes came through, you also find yourself with an empty “pipeline” because of the drop-off in your sales efforts induced by this state of false confidence.

The most likely scenario is that your quote goes into the state of *consideration*. Your quote is in hand, but the decision is not immediate. This often reflects the fact that not all of the competitors will have their quotes in at the same time. It also reflects the fact that what you’re asking this buyer to do—trust you enough to change printers—may be a difficult decision that requires some thought.

The first of those possibilities raises the question of whether it’s better to be the first quote in, in the middle, or the last to arrive. If you’re the “printer-in-place” (the customer’s regular printer) it may be all right to be the last quote to arrive. But if you’re the printer trying to break into the account, you should try very hard to be the first quote in. That says something about your responsiveness, and about how seriously you want the business. Of equal importance, it opens up many more possibilities for you in following up.

Quote And Follow-Up

For the customer, the purchase of printing may be a “quote and order” process. For the salesperson, it might be described better as “quote and follow-up.” *Follow-up* is the single most important technique at your disposal to out-compete those other printers *after the quote has been delivered*.

Consider this before we go on: you’ve already competed well just in gaining the “little victory” of quoting. You have established some of the values to be gained in doing business with you. You don’t really need to break new ground in the follow-up process, but you will probably need to *reinforce* some of the points you’ve already made.)

Just as with your initial sales presentation, there are a number of options in how you approach follow-up. Determining the “right” option depends mainly on how aggressive you want to be in pursuing the order. The one thing that is consistent about any follow-up process is that you want to start it quickly, probably with a telephone call. That will reinforce your prompt response in getting the quote into the prospect’s hands, further illustrate your dependability, and also further illustrate your interest in getting the business. (It will also let you know if you’re the immediate winner, or if your quote has been immediately rejected.)

Here are six possible follow-up approaches, each suggesting some of the questions you might ask to gain your follow-up objective:

1. Quick Phone Call/No Pressure. “Ms. Jones, this is Chris Smith from ABC Printing. I just want to follow up quickly on the quote I sent you. First of all, I want to make sure that it got to you, and that the specifications as I’ve listed them match your expectations. Can you tell me when you expect to make your decision? Thank you, I’ll look forward to hearing from you.”

2. Quick Phone Call/Moderate Pressure. “Ms. Jones, this is Chris Smith from ABC Printing. I just want to follow up quickly on the quote I sent you. First of all, I want to make sure that it got to you. Have you made your decision yet? How does our quote look? Can you give me some guidance on the best way to stay in touch with you as you’re making your decision?”

3. Quick Phone Call/Strong Reminder. “Ms. Jones, this is Chris Smith from ABC Printing. I just want to follow up quickly on the quote I sent you. First of all, I want to make sure that it got to you, and that the specifications as I’ve listed them match your expectations. Can you tell me when you expect to make your decision?”

I want you to know how much I appreciate your consideration. I’m very confident that we’ll do a great job for you. And if you can give me just a moment more, I’d just like to remind you of a couple of things we talked about in our earlier conversation.”

(Here, you would state no more than two or three of the “features” of doing business with ABC Printing that seemed important to this prospect on your earlier conversations. That might include such things as broad capabilities; free pick up and delivery; attention to deadlines; your impressive current customer list; and the fact that you—hopefully—guarantee your work.)

“Well, Ms. Jones, you’ve said that you expect to make your decision by XXXXXX. I’d like to call you then to follow-up if I haven’t heard from you beforehand. Thank you for your time today.”

4. Quick Phone Call/Boldly Ask For The Order. “Ms. Jones, this is Chris Smith from ABC Printing. You’ll have our quotation in hand on the XXXXX project. I’m sure you realize that we want your business, and we’re confident in our ability to do a great job for you. Can I come out there today and pick up the artwork and get the project started?”

5. Extended Phone Call/Consultive Discussion. “Ms. Jones, this is Chris Smith from ABC Printing. I’m calling to follow up on the quote I sent you, and I have a few questions I’d like to ask you. First of all, I want to make sure that the quote got to you, and that the specifications as I’ve listed them match your expectations. Have you made your decision yet? Can you tell me when you expect to make your decision? Can you tell me what the most important factors are going to be as you compare the various printers you have to choose from?”

(As your prospect begins to list the most important factors, listen carefully, and even better still, make notes. Don’t comment on the factors as you hear them, but try to get them all out in the open. If you have any questions about exactly what the prospect means by a particular statement, ask and clarify. Then, comment briefly on what you’ve heard. Your objective in this technique is to stimulate a discussion which will allow you to reinforce key points about your capabilities, service, and all of the other reasons that this prospect should give you the order.)

“Well, Ms. Jones, thank you for your time today. You’ve said that you expect to make your decision by XXXXXX. Is there anything I should do between now and then to improve my chances of becoming your printer?”

6. Extended Phone Call/Consultive Close. “Ms. Jones, this is Chris Smith from ABC Printing. I’m calling to follow up on the quote I sent you, and I have a few questions I’d like to ask you. First of all, I want to make sure that the quote got to you, and that the specifications as I’ve listed them match your expectations. Have you made your decision yet? Can you tell me when you expect to make your decision? Can you tell me what the most important factors are going to be as you compare the various printers you have to choose from?”

(As with the *consultive discussion*, listen carefully and make notes as your prospect begins to list the important factors. Try to get them all out in the open. and comment briefly on what you’ve heard. Your initial objective in this technique is to stimulate the discussion which will allow you to reinforce key points about your capabilities, service, and all of the other reasons that this prospect should do business with you. Then, it’s time to “ask for the order.”)

“Well, Ms. Jones, from all I’ve heard up to now, I have very high confidence that we’re exactly the printer you need. Can I come out and pick up the artwork and get this project started for you?”

Mix And Match

Each of these six approaches is presented as an individual option, but you should see the possibilities for “mixing and matching” depending on the particular circumstances and your own comfort and confidence level. The bottom line, though, is that some form of immediate follow-up is essential after providing a quote to a prospect.

In several of these suggested approaches, another follow-up call is built into your question about when the decision will be made. But you really want to follow-up again on every quote. If nothing else, you want to learn everything you can about why you *didn’t* get the order.

That call you promised to make right around the decision date might go something like this: “Ms. Jones, this is Chris Smith from ABC Printing. My notes tell me that you expected to make the decision on the XXXXX project right about now. How did we do? Are we going to handle that job for you?” (If not...“Well, Ms. Jones, we’re still very interested in building a relationship with you. Obviously, I didn’t fully convince you this time. Can you tell me what that might take? What were the factors that held you back from giving us a chance on this project?”)

If you weren't able to determine a decision date, you should still call and follow-up at a point later on. It might be a good idea to just schedule a call for a point three weeks out from every quote you issue. If you haven't spoken to the prospect by then, make a call that might go something like this: "Ms. Jones, this is Chris Smith from ABC Printing. We gave you a quote back on XXXXX on the XXXXX project. I guess I'm assuming from the time that's gone by that we didn't get the job, but I do want to follow up with you and see what you thought about our proposal. Were we competitive in terms of price? What were the most important factors you considered in awarding the project? What else do you have coming up?"

Keeping Score

A final piece of the "quote and order" process is to keep records on your results. A simple way to do this is to create a *quote and order log*. It can be a simple listing of the prospect's name, date, amount, and resolution, with some space for reasons and comments if you didn't get the job.

A little bit more sophisticated quote and order log will allow you to track your results by individual customer. This can be very helpful, both in dealing with prospects, and with existing customers who put most of their work out for competitive quote. A log like this might tell you that you've quoted ten jobs for a particular company, and not gotten any work. If that were the case, you should probably ask yourself if it's worth the effort to continue to prepare and submit quotes to this company. On the other hand, a log like this might help you to realize that you've quoted ten jobs and gotten them all. If that were the case, you might see an opportunity to raise your prices!

The bottom line on the quote and order process is that any quote worth preparing is worth following up on. And follow-up is both an essential sales tool, and an essential management tool.

Follow-up reinforces your interest in doing business with the prospect...in getting the order! It gives you an opportunity to deal with any objections or problems with your proposal. And it brings the quote and order process to its logical close. You either get the order, or you don't. But instead of wasting time and risking the negative effects of being a "prisoner of hope," you stay motivated to keep your pipeline full. Follow-up is how you really win at the quote and order game.