

Tips for Retaining Customers with Proposals

Submitting business proposals is always a stressful endeavor, and sometimes, it feels even more daunting when your customer is the one requesting a business proposal presentation in order to renew your business. After all, requesting a new bid for existing business can sometimes signal that your customer is about to leave you. However, it could also mean they are following new business processes, or that their needs have changed since you last submitted a bid.

That's why it is important to view a business proposal for existing clients as a fantastic opportunity to retain (and expand) customer accounts. In fact, a formal bid is an excellent time to employ all your client service skills to find out more about your customer's needs, reinforce the outcomes you have already helped them achieve, educate them on other aspects of your business, and earn their recommitment at better terms for both of you.

With that in mind, here are three tips for retaining your customers with proposals.

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Leverage Your Relationship

When preparing a proposal presentation for a customer, you have an extraordinary advantage: you already have a relationship with them. While other vendors competing for the business have to go off what they perceive to be the customer's needs, you and your team have developed a champion and first-hand knowledge of the customer's organization.

Make sure you leverage this relationship to make the bid as effective as possible. Schedule a call with your champion or main users to understand who will be reviewing the proposal, what the proposal document structure will be like, what each stakeholder's objectives are for going through the bid process, and what attitudes the stakeholders might be bringing to the project. This will help you plan how to present the proposal to your client and might also give you proposal presentation ideas, such as catering to the old-school CEO with a print copy while sticking to procurement's processes by submitting via their RFP system.

Think About Expansion

Your customer may be asking you to submit a proposal for services you already provide, but it is also an opportunity to expand your service profile with them or to offer those services to other departments in their organization.

While you're on that prep call with your main users, take the opportunity to review how they currently use your product or solution. Find out if their business goals have changed since the last time you spoke. This is also an opportunity to do some discovery work around whether there are other aspects of your services or solution that they would benefit from.

For example, many Mimeo customers start out ordering on-demand print on behalf of their audience, such as a marketing admin ordering one-sheeters ahead of important sales meetings. With a little bit of discovery work, our customer success managers can identify whether they are better suited to using a Marketplace, which frees up the admin's time by allowing each sales person to order their own collateral.



As you plan the proposal presentation, make sure to take these factors into consideration so that you can present the right services at the right pricing and in the right pricing model for your customer.

Prioritize Customer Success

Last - but not at all least - remember [customer success](#) is the number one priority at all times. Your role in the proposal process is to make sure that the entire document focuses on how your solution or service drives success for this specific customer.

Whether you are officially part of the [pink proposal team](#) or reviewing the committee's rfp proposal checklist, your role is to make sure everything from the proposal document template to the proposal graphics to the content itself focuses on the story of your company helping this specific customer achieve their desired business outcomes. Remind them why they selected you in the first place, the deliverables you have provided them, and the opportunities for growth. Since no relationship is perfect, don't be afraid to mention some of the obstacles you and your customer have encountered, including how you overcame them.

While a customer request for a proposal presentation can feel threatening, it is actually a great opportunity to strengthen and expand an existing relationship. Be sure to get on the phone with your customer to review what they are hoping to achieve with the proposal process, review your current services and identify areas for growth, and keep your customer centered in all messaging. From there, all that is left to do is submit and present!

For help with producing and delivering hard copy proposals, reach out to Mimeo. We offer various proposal binding options, paper stock and insert varieties, and overnight shipping so that your proposal always reflects the best of your business. Schedule a call for a demo and samples!

3 TIPS FOR RETAINING YOUR CUSTOMERS:



**LEVERAGE YOUR
RELATIONSHIP**



**THINK ABOUT
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**PRIORITIZE
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