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documents of previously-crafted slide decks and creating new documents, leverage a proposal software tool.

**Becky Livingston** • Sep. 21, 2022



If you have spent time writing a client proposal, you know it's not easy. It's downright tedious. You might start from an outline, collect prospect information, and include relevant graphs from various departments. I am here to tell you that there is an easier way.

Rather than manually writing each proposal or taking bits and pieces of Word

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2. Speeds up negotiation and objection handling
3. Seamlessly collaborates and tracks the process in a CRM
4. Updates documents and proposals quickly
5. Revives inactive deals
6. Grows revenue
7. Saves time with templates
8. Increases your document hit rate
9. Accepts secure and legally-binding electronic signatures
0. Sets automatic reminders for clients and prospects

## Tried-And-True Proposal Software Tools

[HubSpot](#) recently shared its list of favorite proposal software tools. None are free. Each has unique features.

1. [PandaDoc](#): easily create customized, on-brand proposals through collaboration tools, integrations with several CRMs, and a content library.
2. [RFPIO](#): using artificial intelligence, it suggests responses from your content library that best answers the RFP.
3. [FastSpring IQ](#): easily incorporates videos, customer testimonials, and other supporting assets, acting as a modern alternative for lengthy slide decks and PDFs.
4. [Proposify](#): easily add different sections to your document, customize a proposal with an InDesign-like editor, add text, images, and videos.
5. [Venngage](#): an extensive library of proposal templates with a drag-and-drop editor to create eye-catching proposals in minutes.
6. [Qwilr](#): embed interactive content, such as video, maps, interactive dashboards, and Google Sheets, while tracking what people view and click.
7. [Bidsketch](#): create proposals by combining sections or using the company's sample proposal language; plus, indicate optional fees to take advantage of upselling and cross-selling opportunities.

8. [Loopio](#): pull from your content library to auto-populate a proposal and integrate it

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## Proposal Table of Contents

PandaDoc provides a sample proposal template that you can [download for free](#). It includes the following sections.

- Cover letter
- Sender/Company Background
- Service(s)
  - Bookkeeping
  - Payroll
  - Financial Analysis
  - Tax Preparation
  - Regulatory Compliance
  - Financial Consulting
- Pricing
- Acceptance

## Final Tips

[Hinge Marketing](#) offers these proposal tips for professional services firms:

- Use fewer words
- Organize content for easy skimming
- Never use words when a picture will do, e.g., graphs
- Propose a better way for the client to achieve their goals (versus what they asked for)
- Consider video to capture case studies, client evaluations, or testimonials
- Surprise them with industry research and backup assertions with data
- Offer something extra

When it comes to proposals, do you want to spend time writing them or signing the

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