

Module 9: Proposals That Sell

Summary

Improve close rates by creating clear, fast, and consistent proposal systems.

Sections & Action Items

Build Quote Templates

- Standardize proposal structure by trade
- Ensure scope clarity
- Maintain consistency

Faster Quoting

- Use real-time pricing
- Reduce proposal turnaround time
- Improve accuracy

Track Close Rates

- Monitor win/loss data
- Identify drop-offs
- Improve follow-up timing

Reflection Question

Where does your proposal process lose momentum or clarity?

Next Steps

1. Standardize one template
2. Remove one delay
3. Review close rate data

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Worksheet

How to Use: Answer quickly. Identify ONE improvement to act on.

Proposal Clarity

Are templates standardized? ☐ Yes ☐ No

Where is confusion? _____

Score (1-5): ____

Speed & Accuracy

How fast are proposals sent? _____

Where are delays? _____

Score (1-5): ____

Conversion Tracking

Do you track close rates? ☐ Yes ☐ No

Where do deals stall? _____

Score (1-5): ____

30-Day Action

1 improvement: _____

Owner: ____ Deadline: ____

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