

We only buy when we

(have the **feeling** that we):

Review it / idea overview

Have made the decision

Acceptance from the stakeholder(s)

The resources are present

No or small loss



The effective quotation

It will take **more time** than usual

It will take **more effort** than usual

It will demand that old habits **die**

It will feel **awkward**

It will provoke **fear** in you



Customers use a quotation to **understand**
and **navigate** in making a decision

As a rule a quotation is an attempt to
avoid a **loss**!

It is **loss avation**!



The effective quotation includes:

Giving the customer an **overview**

Enabling the customer to **make a decision**

Encouraging **agreement** from the **stakeholder(s)**

Clarifying which **resources** are **needed**

Quotation design

1. The task:

What the customer wants/needs

2. Price

The investment in achieving the above

3. Content

What the customer gets (in relationship to “The task”)

4. Timeline/implementation

How will the task be implemented?

5. Quotation process

How our cooperation starts or stops!

Title that frames the
subject and shows
that the quotation is
mad for the receiver



A carrot for a screwy installation





Quotation

► **The task**

Price(s) & content

Timeline

Quotation process



1. The task:

Ask the customer to **describe** and **brief** you on the **desired result(s)** of a **purchase**

Use this “brief” as **basis** for a **short** and to-the-**point list** of what you **perceive** the task is - and what the quotation is **designed** to **aim**

Describe the task so that it makes **sense** for **anyone** who reads it, no matter which **level** they are at in the **company**

Make **sure** that you give the **customer** the best **possible overview** of the **task!**





The task

- ▶ The customer's description of the desired results>
- ▶ More...
- ▶ More...
- ▶ More...
- ▶ More...
- ▶ More...
- ▶ More...

The customer's description (brief) of what the solution or result should be. Short, easily read sentences.



Quotation

The task

► **Price(s) & content**

Timeline

Quotation process

2. The price(s):

Always state the **total** price first, and then the segmented prices

You place an economical **anchor** in the (sub)**conscious** mind of the customer

The customer mentally **compares** the **total** price with the **product** content

People remember the **last thing** they are told the **best**

The last information is the **content** of the **investment**

You **ensure** that the customer has an **overview** of the **investment** and what the investment will yield





Prices

€ 3.50
plus X, Y & Z

€ 1.5

€ 1.5

€ 0.5

Product 1
<Short title like: “Indian statue”>



Product 2
<Galvanised screws>



Product 3
<Installation>



3. Content:

In bullet points, describe what the customer **gets** from each product and what the product does

Keep it **below 50** words for **each** product

The customer's (sub)**conscious** mind will now **anchor** the **price** and **outcome** together

You make **sure** that the **customer continues** to have an **overview** of what is **paid** for





Content

\$ 1.5

Description of Product 1

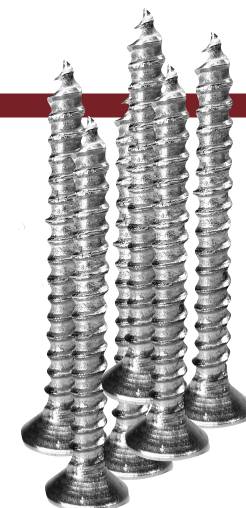
- ▶ Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do
- ▶ Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris
- ▶ Duis aute irure dolor in reprehenderit
- ▶ Excepteur sint occaecat cupidatat non proident



\$ 1.5

Description of Product 2

- ▶ Eiusmod tempor incidunt ut labore et dolore magna
- ▶ Laboris nisi ut aliquip ex ea commodo consequat.
- ▶ In voluptate velit esse cillum dolore eu fugiat nulla
- ▶ Sunt in culpa qui officia deserunt mollit anim id est laborum



\$ 0.5

Description of Product 3

- ▶ Labore et dolore magna aliqua.
- ▶ Ex ea commodo consequat.
- ▶ Dolore eu fugiat nulla pariatur.
- ▶ Officia deserunt mollit anim id est laborum





Organic carrots

€ 1,500

Description of product 1

- ▶ Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do
- ▶ Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris
- ▶ Duis aute irure dolor in reprehenderit
- ▶ Excepteur sint occaecat cupidatat non proident



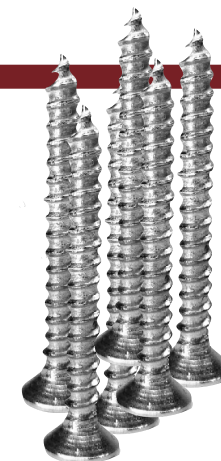


Galvanised screws

€ 1,000

Desription of product 2

- ▶Eiusmod tempor incidunt ut labore et dolore magna
- ▶Laboris nisi ut aliquip ex ea commodo consequat.
- ▶In voluptate velit esse cillum dolore eu fugiat nulla
- ▶Sunt in culpa qui officia deserunt mollit anim id est laborum





Installation

€ 500

Description of product 3

- ▶ Labore et dolore magna aliqua.
- ▶ Ex ea commodo consequat.
- ▶ Dolore eu fugiat nulla pariatur.
- ▶ Officia deserunt mollit anim id est laborum



4. Time line/implementation:

Illustrate how and when the products are delivered and implemented

Draw a time line. When is what done by whom. Help the customer to navigate in the decision and keep a feeling of overview

End the quotation with a graphic overview of the investment

You are helping the customer to keep the greater perspective, confirm the decision, enable stakeholders to see and understand the quotation and show what resources are needed for the implementation



Quotation

The task

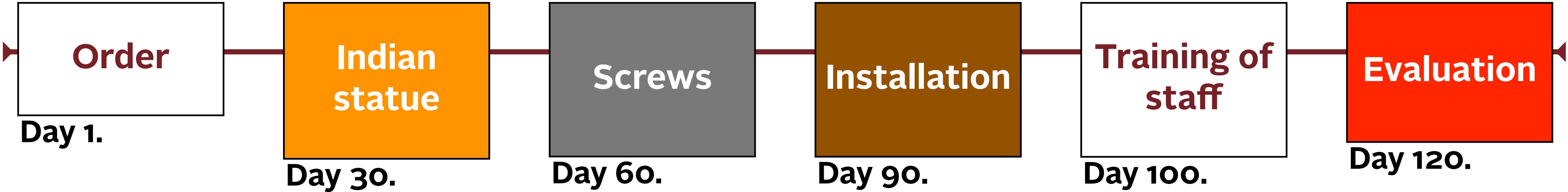
Price(s) & content

 **Timeline**

Quotation process



Time line





Total investment

€ 1.50

Product 1
<Indian statue>

€ 1.50

Product 2
<Galvanised screws>

€ 0.5

Product 3
<Installation>

€ 3.50

Including A & B, plus X,Y & Z



5. Quotation process:

Take control of the agenda from the delivery of the quotation to the final decision

You have invested time in making the quotation - now you make the customer do the same!

By clarifying the process you are helping the customer to make a decision (faster)

Always **present** the quotation **personally** or
as a locked You**Tube** video

Demand that the customer **invests time**
and **energy** in the quotation

The more **time** and **effort** the customer
invests - the more **likely** it is that they
will **choose faster**



Quotation

The task

Price(s) & content

Timeline

 **Quotation process**



Quotation process

- 1. (Video)Presentation**
- 2. Reception of quotation as PDF**
- 3. Establishment of interest or not by x. of June**
- 4. Meeting between <customer> and <your company>**
- 5. Decision to buy or not**

Final title, relevant to
the specific customer



A carrot for a screwy installation





The method is **very** efficient

The customer **invests time** in **you** and
your quotation

You **prove** you are **serious**

90% of your **competitors** design
quotations that are **easy to generate**
and could be mistaken for quotations
made in 1972





The effective quotation & decision facilitation

7-8 orders per 10 quotations

Leaves a heavy anchor in the customer

**Differentiates you from your
competitors**

Very efficient for you!