

**SEAL THE DEAL**

# **ELEVATING YOUR** *Proposal Presentations*



**Shawn Torres**  
In-Telecom



**Alex Farling**  
ScalePad



**Kyle Christensen**  
K7 Leadership

**WEDNESDAY**  
**JULY 26**  
**2 PM ET**



# Kyle Christensen



- I've been boosting MSPs and MSP Vendors for 20+ years.
- I build systems that use mentorship and accountability to drive growth.
- Got a method to shatter your business's limitations, boost growth, profits, and cool company culture.
- I believe in a community-forward approach for best practices and a brighter future.



[Linkedin.com/in/kylechx/](https://www.linkedin.com/in/kylechx/)  
[YouTube.com/@K7Leadership](https://www.youtube.com/@K7Leadership)

# Alex Farling



- Co-Founder at **Lifecycle Insights**, a **ScalePad** company.
- Over 20 years experience in the MSP industry.
- Focused on optimizing vCIO and Account Manager functions for MSPs.
- Serial entrepreneur with a passion for solving hard problems and building better mouse traps.
- MSP Channel Angel Investor/Advisor



[Linkedin.com/in/alexjfarling/](https://www.linkedin.com/in/alexjfarling/)

# Shawn Torres



**IN-TELECOM**  
INTEGRITY. EXCELLENCE. COMMITMENT.

- Chief Executive officer at **In-Telecom**.
- 20+ years of experience in technology sales.
- Built a Multi-million Dollar MSP from the ground up!
- LOVE fixing problems and providing solutions to people's challenges.
- **BIG THINKER!!!**
- Passionate about Family, Health & Fitness, and Giving back to the community.



[Linkedin.com/in/shawn-torres-7628b542](https://www.linkedin.com/in/shawn-torres-7628b542)

**SEAL THE DEAL:  
MASTERING THE**

*Art of  
Proposal Presentation*

# Key Points:

- The Power of a Compelling Proposal Presentation
- Knowing your Audience
- Tell a Story
- Closing Strong

# THE POWER OF A *Compelling Proposal Presentation*

- Can make or break a deal, setting you apart from competitors.
- Showcases expertise.
- Positively impacts the outcome by establishing credibility and building trust.
- Creates a strong connection.
- Tailoring the presentation to the needs and increases engagement and memorability.





# KNOW YOUR *Audience*

- Know your audience and understand their needs and interests.
- Tailor your message and presentation accordingly.
- Focus on financial benefits for investors and creative aspects for creatives.
- Conduct research beforehand to ensure a successful pitch.

# KNOW HOW TO *Tell a Story*

- Captivate listeners.
- Establish strong and deep connections.
- Use anecdotes to illustrate the benefits of your proposal.
- Real examples create an emotional connection and demonstrate its value effectively.





# CLOSING *Strong!*

- Summarize main points and restate proposal benefits.
- Impress the audience with a strong presentation.
- End with a call to action.
- Request feedback or ask for a commitment.

**Buyer**

*Personas*



Sam

- 45 y/o
- Small retail business owner
- Tech Savvy: Mid



Irene

- 37 y/o
- IT Manager
- Tech Savvy: High



Carl

- 52 y/o
- Large corp. CFO
- Tech Savvy: Mid



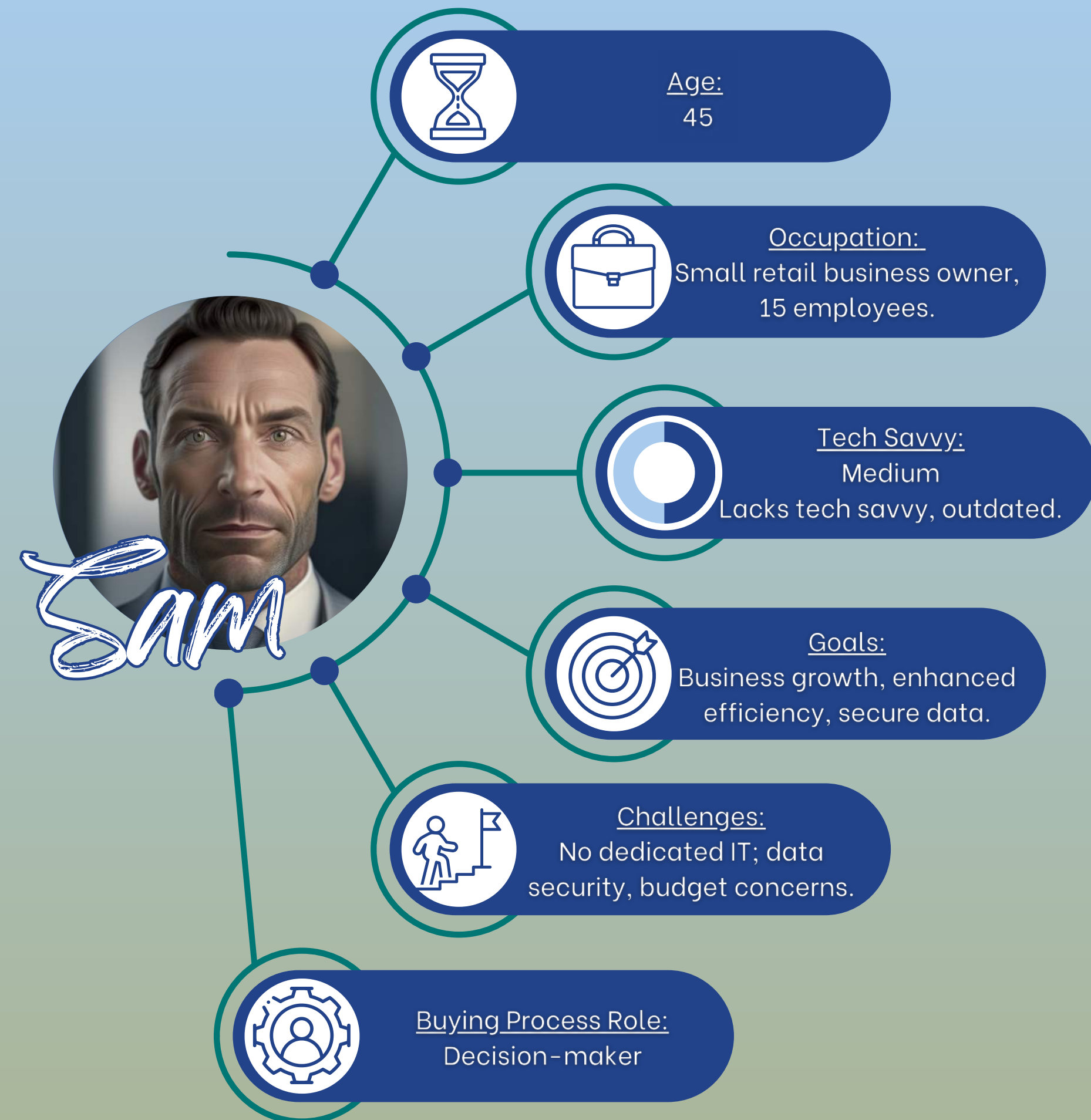
Faye

- 30 y/o
- Tech startup founder
- Tech Savvy: High



Nick

- 40 y/o
- Non-profit Director
- Tech Savvy: Low



“  
**1 I’m not sure we have the budget for outsourced IT services. We usually just handle things ourselves.**  
”

💡 Response:  
**Emphasize that a minor upfront investment can prevent major costs in the future related to downtime or data breaches. Also, point out the potential savings from not needing to maintain a full-time IT staff.**

“  
**2 My business isn’t big enough to be a target for major cyber threats.**  
”

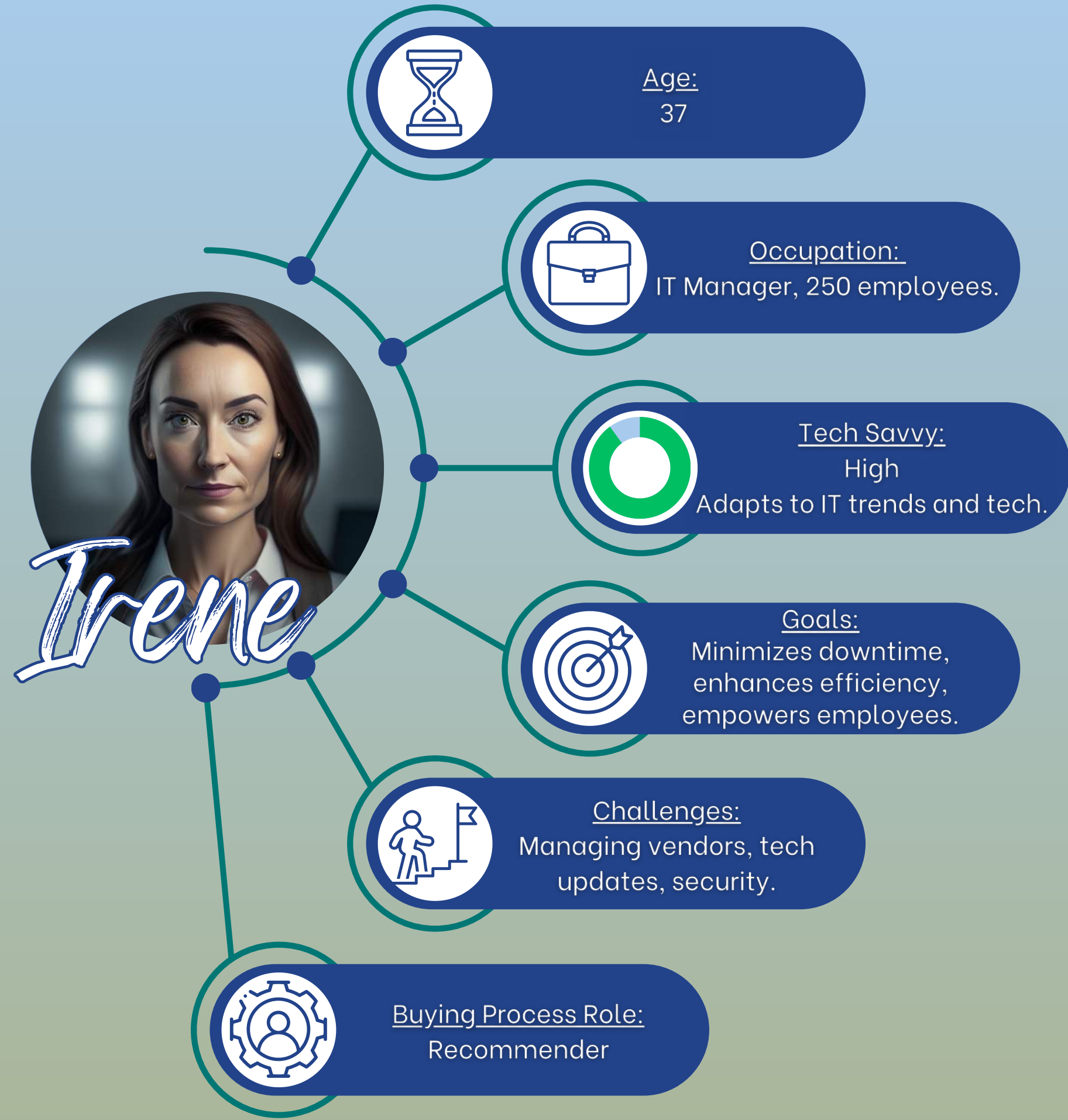
💡 Response:  
**Share statistics about how small businesses are increasingly targeted by cyber-attacks due to their often-weaker security measures. Explain that proactive security measures are a necessity in the modern digital landscape.**

“  
**3 I’m concerned about the transition process. It could disrupt my business operations.**  
”

💡 Response:  
**Assure them of a seamless transition process managed by your team and share examples of successful transitions for businesses of similar size and nature.**



Objection 1: **Early in the conversation, discuss the typical costs of IT mishaps and downtime. This can help the prospect understand the value proposition of MSP services.**  
Objection 2: **In your marketing materials or early discussions, highlight the risks that even small businesses face in terms of cyber threats.**  
Objection 3: **Proactively provide information about how the transition process is managed to minimize disruption.**



“  
**1** We already have an in-house IT team. I’m not sure what value an MSP can add.”

💡 Response:  
**Highlight how your MSP services can complement their existing IT team, freeing them up for strategic, higher-value work. Also, demonstrate how your service provides access to broader expertise and the latest technologies.**

“  
**2** I’ve heard that outsourcing IT can lead to loss of control over our systems and data.”

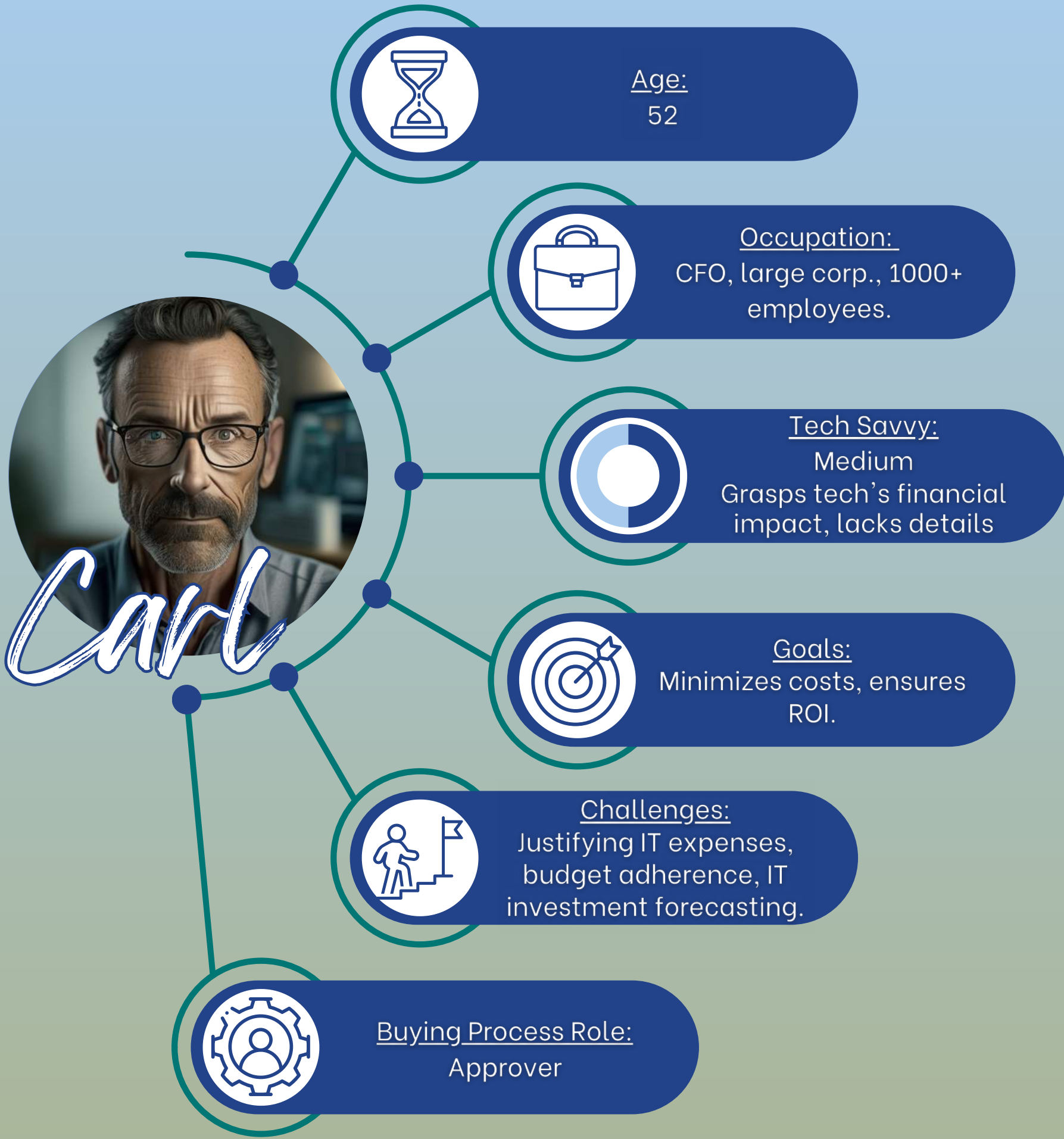
💡 Response:  
**Provide transparency about your operational procedures, data access policies, and how you uphold client autonomy and data sovereignty.**

“  
**3** What if the service isn’t flexible enough to cater to our specific needs?”

💡 Response:  
**Showcase your company’s history of creating personalized IT solutions and demonstrate how you tailor your services to the unique needs of each client.**



Objection 1: **When qualifying leads, ask about the prospect’s current IT team and their workload. This can open a conversation about how MSP services could complement their existing team.**  
Objection 2: **Early in the sales process, address the issue of control when outsourcing IT, giving reassurances about the client’s autonomy and security.**  
Objection 3: **During the discovery call, ask about their unique needs to gauge whether your MSP services can be tailored to meet them.**



1 “The ROI on this kind of investment isn’t clear to me.”

2 “We’re already over budget this year, I don’t think we can afford another IT expense.”

3 “What if the cost of MSP services goes up over time? We need predictable expenses.”

Response:  
Use case studies to illustrate the tangible returns on investment that other companies have seen. Also, highlight the potential cost savings from reduced downtime, improved efficiency, and predictable monthly costs.

Response:  
Discuss the flexible payment plans your company may offer. Reiterate that proactive IT investments can save money in the long run by preventing costly issues.

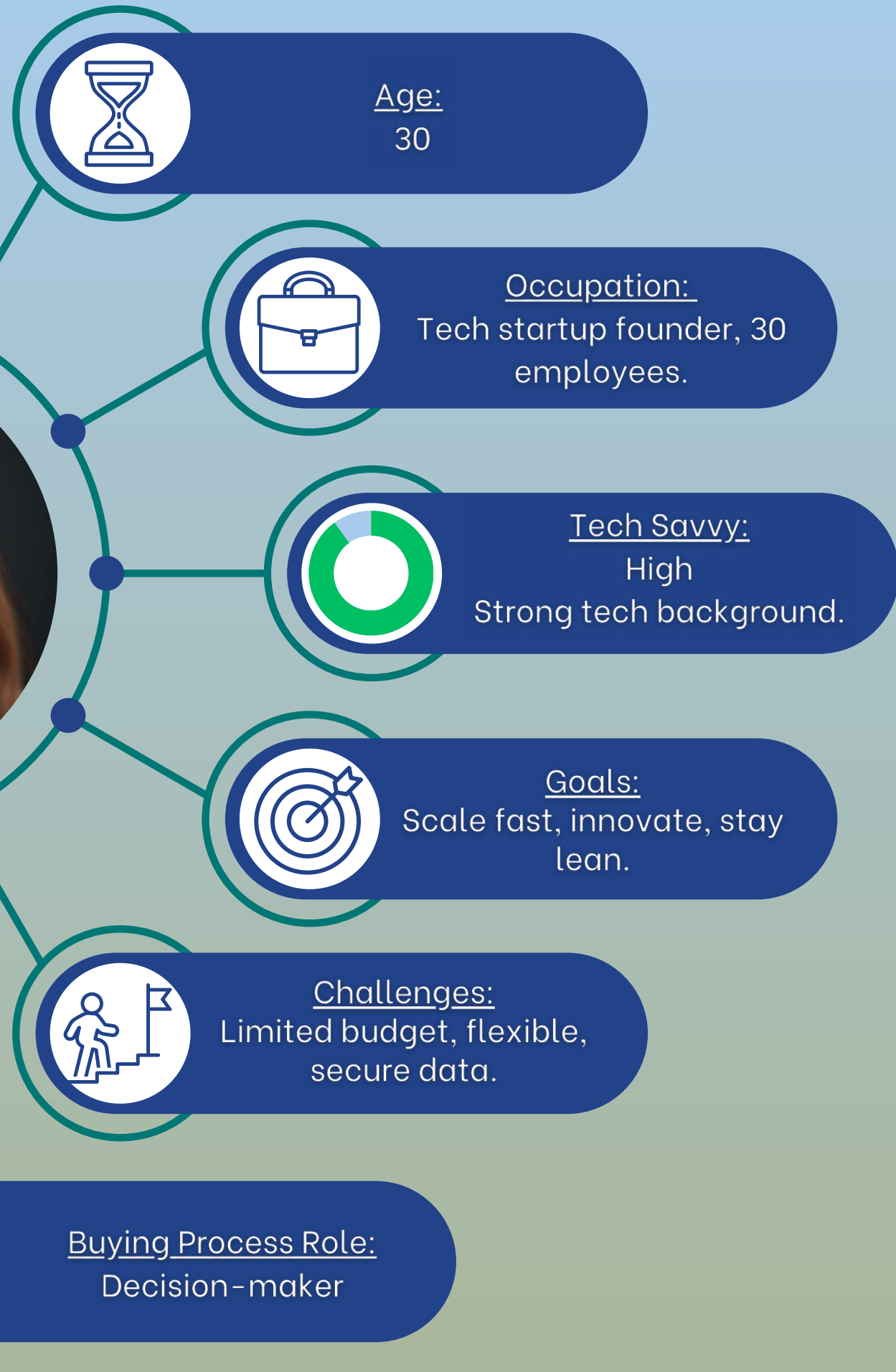
Response:  
Provide details about your pricing structure and assure the CFO that contracts can be designed to ensure cost predictability.



Objection 1: **Provide case studies and ROI data early in the sales process to help financial decision-makers see the potential value.**  
Objection 2: **During the lead qualification process, get a sense of their budget and financial concerns. This can guide your sales pitch and help you highlight flexible payment options, if available.**  
Objection 3: **Address pricing and cost predictability upfront, explaining the cost structure and how prices are adjusted over time.**



Faye



“  
**1 We have a lean startup model and prefer to have our own small but versatile IT team.**  
”

💡 Response:  
*Describe how using an MSP can make their IT costs more predictable and scalable, which is key for a growing startup. Also, emphasize how the MSP can take over routine tasks, allowing their team to focus on innovation.*

“  
**2 I worry that an external service wouldn't be able to keep up with our pace of innovation.**  
”

💡 Response:  
*Highlight your experience with other fast-growing companies and how your MSP keeps up with industry trends and can adapt as their technology needs evolve.*

“  
**3 Our needs are rapidly evolving. How can I be sure your service will scale with us?**  
”

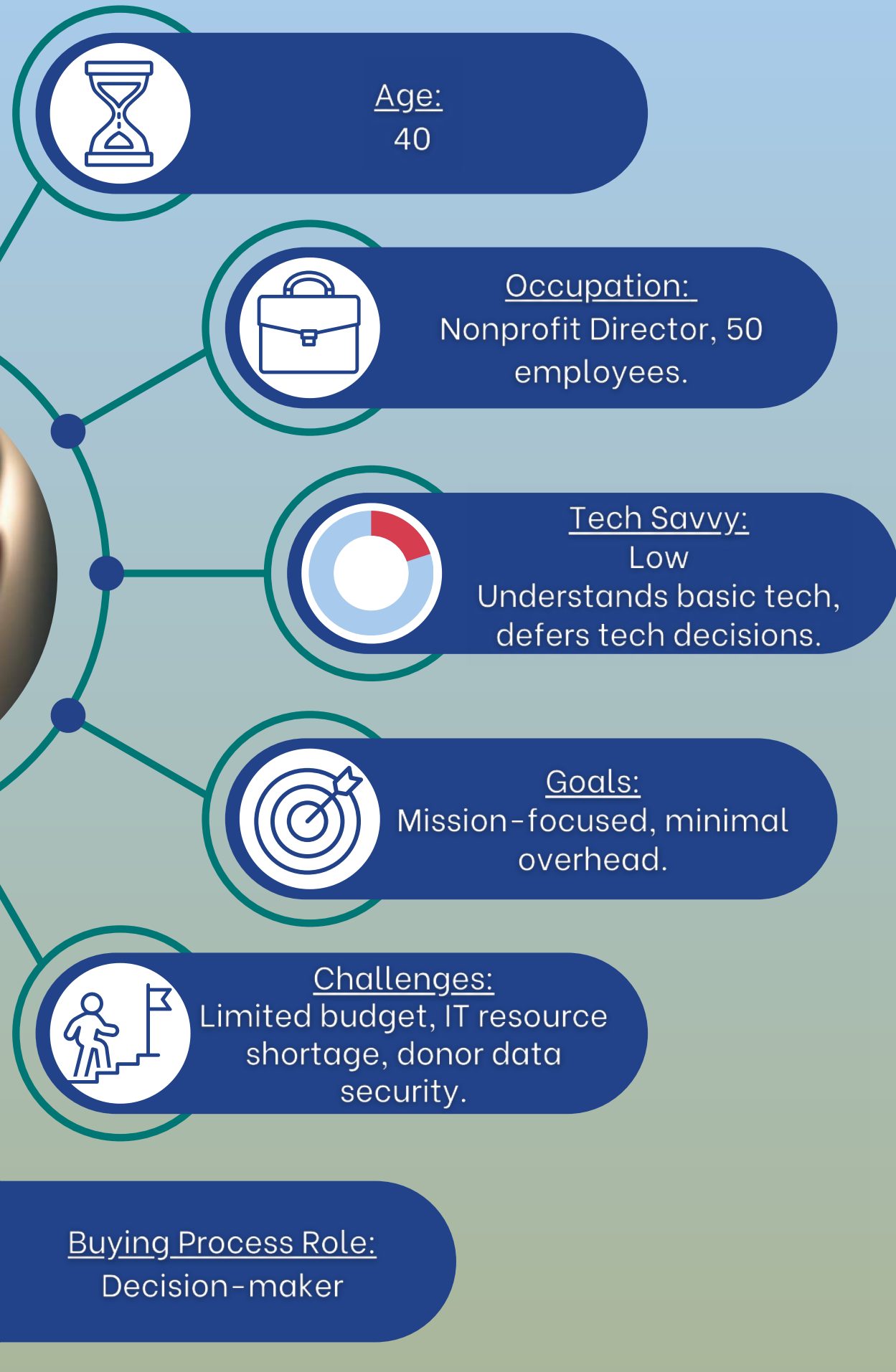
💡 Response:  
*Share examples of how you've helped other companies scale and evolved with them. Also, explain the scalability of your services and how you anticipate and plan for growth.*



Objection 1: **When qualifying leads, ask about their business model and growth plans. You can then explain how your MSP services can scale with them.**  
Objection 2: **Early on, discuss your company's track record with innovative companies and your ability to adapt to changing technology needs.**  
Objection 3: **From the beginning, discuss the scalability of your services and provide examples of how you've helped other companies grow.**



Nick



“  
**1 Our budget is primarily dedicated to our mission work. We can’t afford extra IT services.**  
”

“  
**2 Donors trust us with their data. How can we be sure it’ll be safe with an external provider?**  
”

“  
**3 We have volunteers who help with our IT. Isn’t that enough?**  
”

💡 Response:  
*Discuss any nonprofit discounts or special pricing you offer. Show how outsourcing IT can lead to cost savings and free up more resources for mission-related work.*

💡 Response:  
*Explain your stringent data protection measures, compliance with relevant regulations, and your record of maintaining client data security.*

💡 Response:  
*Point out the limitations of relying on volunteers for crucial IT tasks. Explain that professional MSP services ensure consistency, reliability, and superior security.*



Objection 1: **Early in the process, ask about their budget and financial constraints. If you offer special pricing for nonprofits, be sure to mention it upfront.**  
Objection 2: **Proactively provide information about your security measures and track record with maintaining client data security.**  
Objection 3: **When discussing their current IT situation, ask about the reliability and expertise of their current resources. Use this to highlight the benefits of professional IT services.**

# Check out our upcoming webinar!

## *Setting Sail*

Navigating the Honeymoon  
Phase with Your New MSP Client

**TUESDAY  
AUGUST 8  
2 PM ET**

SCAN  
ME



Alex Farling



Kyle Christensen

**Want a topic for us to talk about?**

*Let us know!*



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# Thank you for attending!



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