

■ FREE GUIDE + 10-SECTION TEMPLATE · 18 PAGES

Write MSP Proposals Buyers Can Approve

Turn your discovery notes into a 10-section proposal the decision-maker can sign off.

By Salesbuildr



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6

discovery mistakes that stall a deal

5

things every approvable proposal shows

10

section template you can copy today

■ A DECISION-READY FRAMEWORK

What's inside

From the problems that lose discovery to a proposal the whole buying team can approve, plus the template to write it.

01 Introduction

Your proposal is the customer's decision pack.

02 Why discovery still loses

Six problems that kill good discovery.

03 The five elements

Context, outcome, scope, transition, consensus.

04 The 10-section template

A repeatable decision structure.

05 Build the business case

Without inventing ROI.

06 Scope, pricing & options

Commercial clarity that gets approved.

07 Sell the transition

The flagship chapter on switching risk.

08 Present, advance & govern

Enable every stakeholder.

09 Proposal operations

Make quality repeatable.

10 About Salesbuildr

How the framework becomes a system.

A1–A2 Toolkit: fill-in template

Ten sections with prompts. Copy it for your next deal.

A3–A5 Toolkit: worked examples

A complete sample proposal and a business case with numbers.

■ INTRODUCTION

Your proposal is the customer's decision pack

It must survive internal circulation and help a group decide.

A winning MSP proposal is a decision-enablement system: it helps several stakeholders understand the risk, value, scope, investment, transition plan, and the next decision required.

WHY THIS MATTERS

61%

of B2B buyers would rather buy without a sales rep at all, so your proposal has to make the case when you're not in the room.

— GARTNER SALES SURVEY, JUNE 2025 · 632 B2B BUYERS

WHO MUST APPROVE

01 Owner / CEO

02 Finance

03 IT / technical

04 Security / compliance

05 Operations

06 Procurement / legal

■ CHAPTER 01

Why Good Discovery Still Loses

Six problems between a strong discovery call and an approvable proposal.

Good discovery still loses when the proposal can't help a group decide.

01**Static quotes**

A PDF can't survive internal circulation.

04**Opaque commercials**

Inclusions, exclusions and variables stay buried.

02**Generic narrative**

Doesn't reflect what discovery revealed.

05**Stakeholder misalignment**

No view for finance, security or procurement.

03**Missing transition plan**

Switching risk goes unaddressed. It is the biggest omission.

06**Weak follow-up**

No mutual action plan after the send.

■ CHAPTER 02

The 5 Elements of a Decision-Ready Proposal

Visual design and personalisation are principles applied across all five.

01 **Decision context**
Why change now, and what happens if nothing changes?

02 **Outcome & recommendation**
The future state you propose, and why it fits.

03 **Scope & commercial clarity**
What's included, excluded, assumed, priced and variable.

04 **Transition confidence**
Onboarding, migration, governance and early-life support.

05 **Consensus & commitment**
Help every stakeholder validate and approve the next step.

■ CHAPTER 03

The 10-Section Proposal Template

A repeatable decision structure, one page per section.

01 Executive decision summary

Recommendation, outcomes, investment range, decision.

02 What we heard

Their priorities, risks, constraints, success criteria.

03 Why act now

The status quo cost: incidents, risk, lost productivity.

04 Target operating model

Service desk, management, governance, cadence.

05 Recommended solution & scope

Stack, quantities, inclusions, exclusions.

06 Implementation & transition

Onboarding, milestones, responsibilities, timeline.

07 Security & assurance

Identity, backup, monitoring, SLAs, reporting.

08 Investment & commercial model

One-time, recurring, variables, assumptions.

09 Proof & differentiation

Relevant evidence, credentials, outcomes.

10 Decision plan & approval

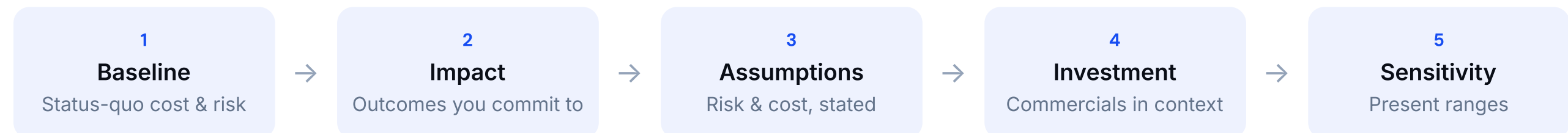
Option, stakeholders, open decisions, next step.

■ CHAPTER 04

Build the Business Case Without Fake ROI

A defensible case beats a dramatic one. State the baseline, assumptions and sensitivity.

FIVE STEPS TO A DEFENSIBLE CASE



Never invent savings. Show the current state, the assumptions behind the impact, and a range the buyer can stress-test.

■ CHAPTER 05

Scope, Pricing & Options

Make the business case first, then make the commercials exceptionally easy to approve.

SEPARATE THESE CLEARLY

One-time charges

Recurring fees

Usage variables

Included vs billable

Third-party & licences

Term & renewals

CHOOSE THE OPTION MODEL DELIBERATELY

Standard offer One recommended service + a few outcome-led options

Distinct risk profiles Three packages framed on outcomes

Complex transformation A phased target-state with decision gates

Existing-client expansion Baseline comparison + opportunity roadmap

Procurement-led Compliant scope, assumptions register, commercial plan

CHAPTER 06

The Proposal Must Sell the Transition

Buyers fear switching providers more than they want your new benefits.

The prospect is choosing a migration, a new operating model, and a period of shared risk. Make that path visible.

THE TRANSITION PLAN: FIVE PHASES

Validate	Confirm estate, users, licences, vendors, risks	Signed discovery output
Prepare	Runbook, access plan, security baseline	Readiness checkpoint
Onboard	Configure, onboard users, establish support	Go-live acceptance
Stabilise	Resolve inherited issues, tune monitoring	30/60/90-day review
Govern	QBR/vCIO cadence, improvement roadmap	Agreed technology roadmap

■ CHAPTER 07

Present, Advance & Govern

Equip the champion to sell the decision to people who weren't in discovery.

WHAT EACH STAKEHOLDER NEEDS TO APPROVE

Owner / CEO

Continuity, outcomes, accountability

Finance

Commercial model, predictability, ROI

IT / technical

Architecture, boundaries, migration

Security / compliance

Identity, incident process, evidence

Operations

Support experience, onboarding, adoption

Procurement / legal

Scope, term, exclusions, SLAs

ADVANCE & GOVERN

Prepare the champion

Arm them to sell internally

Schedule a live review

Present it. Don't just email it.

Signals as hypotheses

Test, don't surveil

Mutual action plan

Agree the next decision

■ CHAPTER 08

Proposal Operations

Make quality repeatable without relying on your best rep.

01

Content blocks

Approved building blocks.

02

Approval rules

Thresholds and chains on every quote.

03

Scope guardrails

Inclusions, exclusions and dependencies enforced.

04

Pricing governance

Catalogue and margin rules, applied consistently.

05

PSA / CRM handoff

Won deals flow into contracts automatically.

06

Win / loss learning

Record why you won or lost, and feed it back.

KEEP A TEMPLATE LIBRARY

Readiness checklist · executive summary · scope & assumptions register · transition plan · stakeholder map · mutual action plan · win/loss review.

How the framework becomes a system

Salesbuildr turns this framework into daily practice: CPQ, portfolio, PSA and whitespace in one system.

WHAT SALESBUILDR OPERATIONALIZES

Smart revenue discovery

Whitespace in your base

CPQ

Configure, price and quote

Native PSA integrations

Autotask, ConnectWise, HaloPSA

50+ distributor feeds

Real-time, accurate costing

Template system

Governed building blocks

30-day guarantee

Zero risk to get started

THE PEOPLE BEHIND SALESBUILDR

Meet the team behind the platform and this framework.



Victor Raessen
Founder



Micha Bos
Sales Director Europe

See the framework in a working example

Book a demo to see a decision-ready proposal built end to end. Used by hundreds of MSPs.

[Book a demo](#)

■ FILL-IN TEMPLATE • PART 1 OF 2

Your 10-section proposal template

Copy these headings into your proposal tool. Fill each section from your discovery notes before you open the price list.

01 Executive decision summary

What do you recommend, what will change for them, what does it cost (range), and what decision do you need by when?

02 What we heard

Their top three priorities, the risks they named, constraints (budget, timing, contracts), and how they will judge success. Use their words.

03 Why act now

What does the current situation cost them? List incidents, hours lost, audit findings or insurer demands. Only facts they gave you.

04 Target operating model

How support will work: service desk hours, response targets, who their contact is, review cadence (monthly, quarterly).

05 Recommended solution & scope

Services and quantities. Then two lists: included and not included. Name what depends on them or a third party.

Your 10-section proposal template

If a section stays empty, you have a discovery gap. Book a short follow-up call before you send.

06 Implementation & transition

Phases, dates, who does what on both sides, and what happens in the first 30, 60 and 90 days.

07 Security & assurance

Identity, backup, monitoring, SLAs and the reports they will receive. Match it to any insurer or audit requirement.

08 Investment & commercial model

One-time, monthly recurring, usage-based items and licences, each on its own line. State assumptions and term.

09 Proof & differentiation

One or two relevant examples (same size or industry), certifications, and what you do that their current provider does not.

10 Decision plan & approval

Options they can choose, who signs off (owner, finance, IT), open questions, and the next meeting with a date.

■ WORKED SAMPLE • PART 1 OF 2

Sample proposal: a 60-user accounting firm

FICTIONAL EXAMPLE

Harbourline IT and its client are fictional. The figures show how a filled-in section reads; they are not benchmarks.

01 Executive decision summary

We recommend Harbourline Managed Workplace for all 60 users, starting 1 March. It replaces ad-hoc support with a fixed monthly fee and a named team. Investment: €5,280 a month plus €6,000 onboarding. We ask for a decision by 14 February so onboarding finishes before tax season.

02 What we heard

Fewer outages during filing deadlines. A predictable IT bill instead of surprise invoices. Proof of backup and MFA for the cyber insurer's renewal in April. Their office manager wants to stop being the IT help desk.

03 Why act now

Last year they logged 14 outages that stopped work, mostly in peak weeks (their own ticket history). The insurer requires MFA and tested backups at renewal. Their current break-fix invoices totalled €28,000.

04 Target operating model

Service desk 08:00–18:00 on weekdays, 1-hour response for urgent tickets. Named account manager. Monthly service report, quarterly review with the managing partner.

05 Recommended solution & scope

Included: help desk, device management for 60 laptops, Microsoft 365 administration, MFA, backup with monthly restore test, patching. Not included: new hardware, the practice-software upgrade (quoted separately), after-hours work unless selected.

■ WORKED SAMPLE · PART 2 OF 2

Sample proposal: a 60-user accounting firm

FICTIONAL EXAMPLE

Each section answers one question the finance partner or the IT lead will ask after the meeting.

06 Implementation & transition

Weeks 1–2: audit devices, accounts and licences. Weeks 3–4: MFA and backup live, users onboarded in two groups. Day 30: go-live review. Day 60: inherited issues fixed. Day 90: first quarterly review.

07 Security & assurance

MFA on all accounts, daily backup with a monthly restore test, endpoint monitoring. A one-page evidence pack for the insurer before the April renewal.

08 Investment & commercial model

€88 per user per month × 60 = €5,280 a month, 24-month term. Onboarding €6,000 one-time. Microsoft licences billed at cost on a separate line. Assumes no more than 5% user growth per quarter.

09 Proof & differentiation

We support other accounting firms of 40–80 users through tax season. Insurer evidence pack included as standard. Fixed fee covers everything in section 05.

10 Decision plan & approval

Option A: full scope (recommended). Option B: help desk and security only, no device management. Sign-off: managing partner and finance partner. Open question: start date for group 2. Next step: review call on 10 February.

WORKED BUSINESS CASE

A business case with real arithmetic

FICTIONAL EXAMPLE

The same fictional client, built with the five steps from chapter 4. No invented savings: every input comes from the client or is stated as an assumption.

STEP	WHAT GOES IN	FICTIONAL EXAMPLE
1 · Baseline	Status-quo cost, from the client's own records	14 outages × 3 hours × 20 affected users × €45 loaded hourly cost = €37,800 lost time. Break-fix invoices: €28,000 . Total: €65,800 a year .
2 · Impact	What you commit to change	Break-fix invoices replaced by the fixed fee. Outage hours reduced (the range is in step 5).
3 · Assumptions	Every number you could be wrong about	Outage reduction between 30% and 70%. Loaded cost €45/hour (client's figure). Headcount stays at 60.
4 · Investment	Commercials in context	Year 1: €5,280 × 12 + €6,000 onboarding = €69,360 .
5 · Sensitivity	A range they can stress-test	See the table on the right.

OUTAGE REDUCTION	LOST TIME AVOIDED	+ BREAK-FIX REPLACED	YEAR-1 NET COST
30%	€11,340	€28,000	€30,020
50% (plan)	€18,900	€28,000	€22,460
70%	€26,460	€28,000	€14,900

What the case says

Year 1 costs the client more than today in every scenario. The case for buying rests on fewer outages in peak weeks, insurer-ready security and a fixed bill. Write that down plainly; finance will trust the rest of the proposal more.

Net cost = investment – lost time avoided – break-fix replaced. All inputs are fictional.

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PRODUCTISATION

Turn Your MSP Services into Products You Can Price

The P.R.O.M.I.S.E. framework, templates and pricing worksheet.

SALES

The MSP Sales Playbook: From 2 Reps to 10

How to hire, train and run a growing sales team.

MARKETING

The 8-Step MSP Marketing Plan

A step-by-step plan for acquisition and expansion.

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