STANDARD OPERATING PROCEDURE

Sales Quote and Proposal SOP

Document no.	SOP-SLS-003
Revision	1.0
Owner	Sales Manager
Effective date	September 15, 2026
Review cycle	Every 12 months

1. Purpose

To produce accurate, approved quotes and proposals quickly, so deals aren't slowed down or put at risk by pricing errors or missed approvals.

2. Scope

Applies to creating, approving, and sending quotes and proposals for new and renewal business. Contract redlines and legal negotiation are covered by a separate SOP.

Definitions

Discount approval matrix	A table defining which discount levels can be approved by a rep, manager, or finance based on deal size or percentage.
CPQ	Configure, price, quote. Software used to build accurate quotes from approved pricing and product rules.

3. Responsibilities

Account Executive	Configures the quote, requests approvals, and sends the final proposal to the prospect.
Sales Manager	Approves discounts within their authority and escalates larger requests to finance.
Deal Desk Analyst	Checks quotes for pricing and contract term accuracy before they go out.

RACI matrix

Activity	Account Executive	Sales Manager	Deal Desk Analyst
Configure the quote	R/A	I	C
Approve a standard discount	C	R/A	I
Approve a non-standard discount or term	C	R	R/A
Check the quote for accuracy	C	I	R/A
Send the proposal to the prospect	R/A	I	-

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- CPQ or quoting software
- Current price list and discount approval matrix
- Proposal or contract template
- E-signature platform
- CRM opportunity record

5. Procedure

Step	Task	Owner	Done
5.1	**Confirm the agreed scope** Confirm the products, quantities, and terms discussed with the prospect before building the quote, so the draft reflects what was actually agreed.	Account Executive	☐
5.2	**Build the quote in the CPQ** Build the quote using the CPQ or quoting software rather than a manual document, so pricing and product rules are applied automatically.	Account Executive	☐
5.3	**Apply the correct list pricing** Apply current list pricing from the approved price list, checking that no outdated or unauthorized pricing is carried over from an old template. **Checkpoint:** Quote pricing matches the current approved price list before any discount is applied.	Account Executive	☐
5.4	**Request approval for a discount** If a discount is needed, check it against the discount approval matrix and request approval from the sales manager if it exceeds the rep's own authority.	Sales Manager	☐
5.5	**Escalate a non-standard request** Escalate a discount, custom term, or unusual payment schedule beyond the sales manager's authority to the deal desk analyst for review. **Checkpoint:** Every discount or term outside the standard approval matrix has a recorded approval before the quote is sent.	Deal Desk Analyst	☐
5.6	**Check the quote for accuracy** Review the quote line by line for correct products, quantities, pricing, and contract term length before it moves to the proposal document.	Deal Desk Analyst	☐
5.7	**Assemble the proposal document** Assemble the proposal using the approved template, inserting the prospect's specific scope, pricing, and any agreed customizations from the discovery notes.	Account Executive	☐
5.8	**Do an internal review pass** Have a second person, such as the sales manager, review the proposal for typos, inconsistent numbers, or missing sections before it's sent externally.	Sales Manager	☐
5.9	**Send the proposal for e-signature** Send the finished proposal through the e-signature platform with the correct signer contacts, rather than emailing an unsecured document for manual signing.	Account Executive	☐
5.10	**Track the proposal status** Track whether the proposal has been viewed and signed in the e-signature platform, and follow up if there's no activity within a few business days.	Account Executive	☐

Step	Task	Owner	Done
5.11	**Update the CRM opportunity** Update the CRM opportunity stage and record the sent quote, discount approvals, and any changes made during negotiation.	Account Executive	☐
5.12	**Hand off the signed agreement** Once signed, route the completed agreement to the appropriate team for account setup and billing, and confirm the opportunity is marked closed-won.	Account Executive	☐

6. Quality checks

- Every quote reflects current approved pricing before any discount is applied.
- Discounts and non-standard terms have a recorded approval matching the approval matrix.
- Proposals go through an internal accuracy review before being sent.
- Closed-won opportunities have a signed agreement on file.

7. Records

- CPQ quote history
- Discount and exception approvals
- Signed proposals from the e-signature platform
- CRM opportunity and stage history

8. KPIs

- Average time from quote request to sent proposal
- Percentage of quotes requiring a pricing correction after sending
- Quote-to-close conversion rate

9. Common mistakes

- Sending a quote with outdated pricing copied from an old template.
- Applying a discount above the rep's authority without approval.
- Skipping the internal review pass before sending to the prospect.
- Forgetting to update the CRM opportunity after the proposal is sent.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Alexa Uskova

Approval

Prepared by	Approved by	Date

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