

Best Tools for MSP Proposal Generation

A category-by-category comparison of MSP proposal tools — quoting/CPQ, e-signature document software, and the operating-layer approach — with the questions that actually decide which fits.

The short answer

There's no single "best" proposal tool for every MSP — there are three categories that solve different parts of the problem, and the right answer depends on where your proposals actually break down. If the pain is **quoting and pricing accuracy**, you want CPQ/quoting software (Quoter, ConnectWise CPQ, ScalePad-style asset-to-quote tools). If the pain is **document creation, sending, and e-signature**, you want proposal/document software (PandaDoc, Proposify, Better Proposals). If the pain is **speed and consistency end to end** — getting a margin-correct proposal out the same day, priced the same way every time, with the sent-to-signed loop tracked — that's a workflow problem the point tools don't fully solve, and it's where an operating-layer approach like Catalyst OS module M.03 fits.

This guide compares the categories honestly so you can match the tool to your actual bottleneck.

First, diagnose where proposals break

Tooling only helps if it fixes your real constraint. Before comparing products, find the bottleneck:

- **Pricing takes too long or comes out inconsistent.** Someone has to look up costs, apply margin, and build the numbers — and two salespeople quote the same scope differently. *Your problem is quoting.*
- **The document itself is slow to produce or looks inconsistent.** Pricing is fine, but turning it into a clean, branded, signable proposal eats hours. *Your problem is document creation and e-signature.*
- **Proposals go out days late and you don't know what happens after.** The discovery call was Tuesday; the proposal lands Friday or Monday, and once it's sent it disappears into a black box. *Your problem is end-to-end velocity and tracking.*

Most MSPs have some of all three, but one usually dominates. Name it, then read the category that addresses it.

Category 1 — Quoting / CPQ tools

What they do: Turn products and services into accurate, margin-aware quotes. They maintain pricing catalogs, pull distributor pricing, apply your margin rules, and output a priced quote — often integrated with your PSA so the quote flows into an agreement.

Representative tools: Quoter, ConnectWise CPQ (formerly Sell), and asset-management-driven quoting tools that turn an RMM/asset inventory into hardware-refresh quotes.

Best for: MSPs whose proposals stall on *pricing* — product-heavy quotes, frequent hardware refreshes, distributor price lookups, multi-line configurations where margin errors are expensive.

Watch-outs: CPQ excels at the priced line items and less at the persuasive, plain-language proposal an owner-operator buyer actually reads. A perfect quote isn't a compelling proposal. And CPQ generally doesn't track or improve your sent-to-signed conversion — it stops at producing the number.

Category 2 — Proposal / e-signature document software

What they do: Turn content into polished, branded, interactive proposals you can send and get signed online. Templates, content libraries, e-signature, and open/view tracking are the core. Many integrate with CRMs.

Representative tools: PandaDoc, Proposify, Better Proposals.

Best for: MSPs whose proposals stall on *document production and closing the signature* — teams that have the pricing figured out but lose time formatting documents, and want to know when a prospect opened the proposal and sign it without printing.

Watch-outs: These tools are pricing-agnostic — they format whatever numbers you put in, so they don't enforce margin consistency or generate the pricing for you. They're horizontal (built for every industry, not MSPs), so MSP-specific logic — agreement structures, per-seat managed services, tiered scopes — is something you template yourself. They speed up the document, not the thinking behind it.

Category 3 — The operating-layer approach

What it does: Treats the proposal as the output of a workflow rather than a document you build. It reads the context that should drive the proposal — the discovery, the account, your standard

pricing logic — generates margin-aware scope variants in plain business language the same day, and tracks the sent-to-signed loop with win/loss capture so the system learns what closes.

Representative approach: Catalyst OS Proposal Generation (M.03).

Best for: MSPs whose proposals stall on *end-to-end velocity and consistency* — where the gap between the discovery call and the proposal landing is costing deals, where different people price the same scope differently, and where nobody can say what your proposal win rate actually is.

Watch-outs: It's delivered as a managed service installed on your stack, not a self-serve app you sign up for in an afternoon — which is the point if you want it running on your real data, and the wrong shape if you just need a quick e-signature tool for occasional one-off documents.

Side-by-side

	Quoting / CPQ	Proposal / e-sign software	Operating-layer (M.03)
Generates accurate, margin-aware pricing	Yes — its strength	No (you supply the numbers)	Yes
Produces the polished, sendable document	Partial	Yes — its strength	Yes
E-signature	Sometimes	Yes	Via the workflow
Enforces pricing consistency across reps	Within the catalog	No	Yes
Same-day turnaround from discovery	Depends on you	Depends on you	The design goal
Tracks sent-to-signed + win/loss	Rarely	View tracking only	Yes
MSP-specific by design	Often	No (horizontal)	Yes
Delivery model	Self-serve SaaS	Self-serve SaaS	Managed service on your stack

How to choose

1. If your bottleneck is pricing accuracy and speed — start with a quoting/CPQ tool, especially if you're product- and hardware-heavy. Get the numbers right and consistent first.

2. **If your bottleneck is document production and getting signatures** — a proposal/e-signature tool is the fastest, lowest-commitment win. You'll be sending cleaner proposals this week.
3. **If your bottleneck is the whole motion** — proposals going out days late, priced inconsistently, with no visibility after they're sent — the point tools each fix one slice and leave the workflow gaps between them. That's the case for an operating-layer approach that runs the end-to-end motion on your existing data.

These aren't mutually exclusive. Plenty of MSPs run a quoting tool for the numbers and a document tool for the send. The operating-layer question is whether you want the *workflow* — discovery to margin-aware proposal to tracked outcome — to run as one consistent motion instead of three tools you stitch together by hand.

Where Catalyst OS fits

Proposal Generation (M.03) is one of the five modules in Catalyst OS, the business-layer operating system for an MSP. It delivers margin-aware proposals the same day as the discovery call — three scope variants priced consistently, with follow-up sequences and win/loss capture built in — running on the PSA and CRM you already use. Like every module, it's published pricing (a one-time setup plus a fixed monthly), delivered as a managed service, with the deliverables defined in writing before you pay. It tends to sell as an expansion after QBR automation, once the data foundation is already in place.

If proposal velocity is your worst bleeding, it can also be where you start.

Frequently asked questions

What's the best tool for MSP proposal generation?

There isn't one universal best — it depends on your bottleneck. For pricing accuracy, a quoting/CPQ tool (Quoter, ConnectWise CPQ) is best. For document creation and e-signature, proposal software (PandaDoc, Proposify, Better Proposals) is best. For end-to-end speed and consistency from discovery to a tracked, signed proposal, an operating-layer approach like Catalyst OS M.03 fits. Diagnose where your proposals break before choosing.

What's the difference between CPQ and proposal software?

CPQ (configure-price-quote) tools generate accurate, margin-aware pricing and product configurations. Proposal/e-signature software turns content into polished, branded, signable documents and tracks when they're opened. CPQ solves the numbers; proposal software solves the document. Many MSPs use both, because neither fully covers the other's job.

Why are MSP proposals so slow to produce?

Usually because the proposal is rebuilt by hand each time — looking up pricing, applying margin, formatting a document, then losing track of it after sending. The delay between a discovery call and the proposal landing is where deals cool off. Speeding it up means either better point tools for the slow step or a workflow that runs the whole motion from discovery to signed.

Do I need MSP-specific proposal software?

Not necessarily, but it helps. Horizontal proposal tools work for any industry and don't enforce MSP-specific logic like per-seat managed-service pricing, agreement structures, or tiered scopes — you template that yourself. MSP-specific or operating-layer approaches build that logic in, which matters more the more standardized you want your pricing to be across the team.

How does Catalyst OS Proposal Generation compare to PandaDoc or Proposify?

PandaDoc and Proposify are excellent at the document and e-signature step and are self-serve. Catalyst OS M.03 is broader and different in shape: it generates the margin-aware pricing and the document, runs same-day from the discovery context, and tracks sent-to-signed with win/loss capture — delivered as a managed service on your existing PSA and CRM rather than a self-serve app. Choose the document tools if the document is your only gap; consider the operating layer if the whole proposal motion is.

Catalyst OS is the business-layer operating system for an MSP — the layer the major MSP vendors have no incentive to build. Proposal Generation (M.03) is one of five modules. The first conversation is a 30-minute listen, not a pitch.

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