Proposal Writing:
The Art of Staying in Business
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Agenda

• What is a proposal
• Common scenario
• Proposal evaluation
• Good proposals
• Tips

A Proposal is...

• A sales document, written to persuade someone to follow a plan
• NOT
  – A bill of materials
  – Technical specification
  – Price quote
  – Company history
  – Project plan

Types of Proposals

• Internal
  – Changes
  – Recognition of a need
• Sales
  – Services and Products
  – Response to various invitations

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Jargon Simplified

• LOI = Letter of Intent / Inquiry
• RFI = Request for Information
• RFP = Request for Proposal
• EOI = Expression of Interest
• SOW = Statement of Work
• SOR = Statement of Requirement
• ITT = Invitation to Tender
• ...

A Proposal Contains...

• Executive summary
• Problem description
• Solution
• Conclusion
• Appendices
• Navigational aids

Proposals are Typically Written...

• By people who hate to write them
• To impress by sheer weight
• To showcase a product or service

Pitfalls

• Client’s business problems overlooked
• Structure not persuasive
• Differentiation non-existent
• Value proposition not compelling
• Key points hidden well
• Filled with jargon
• Editing and presentation paucity
• It’s all about ME
Proposals are Judged by...

- Your response to the client’s needs
- Your level of competency
- ROI (Return on Investment)

Making Decisions

- Rational, logical
- Complex, confusing
- Information overload
- Conflicting evidence
- Time!

What do you think?

- People decide to look at a proposal in detail within
  - 5 minutes
  - 10 – 15 minutes
  - 30 minutes

Evaluators Look for Quick Routes...

- Least amount of evidence
- Process of elimination
  - Checklist
  - Last successful factor
  - ROI
An Effective Proposal…

- Is one that wins!
- Shows your clear understanding of the client’s issues
- Recommends a specific solution
- Demonstrates your competency
- Provides a compelling reason to choose your recommendation

First Impressions Count

- The first proposal sets expectations
- Provide compliance matrix
- Highlight key points

A Good Proposal

- Presents facts
- Persuades
- Avoids pitfalls
- Is client-centric

Persuasion

- Plato – “Persuasion is the key to power”
- Aristotle – “persuasive appeals”
  - Logos = fact
  - Pathos = emotion
  - Ethos = credibility
- Cicero – “If you wish to persuade me, you must think my thoughts, feel my feelings, and speak my words”
Persuade...

- Demonstrate understanding of client's needs
- Recommend a specific solution
- Provide evidence of competency
- Identify qualitative and quantitative ROI

Facts and Persuasion

- An oxymoron?
- Many layers
- Intermingled
- No minimalism
- No verbosity
- Just enough

Tips – Avoid Pitfalls

- Identify the audience
- Identify client’s business problems
- Provide fact
- Design a reasonable structure
- Highlight key points
- Use client’s jargon
- Persuade
- Polish

Client – Centric

**User – centric**
- Focus on client's needs
- Present solutions to business problems
- Long-term partnership
- Qualitative and quantitative ROI
- Value-added offerings

**Product – centric**
- Focus on product / service / technology
- Presents information
- Short-term supplier–buyer
- Profit margin
- Checklist of line items
Client – Centric Through…

- Hot buttons – client’s key issues
- Problem analysis
- Alternate solutions
- Recommended solution
- ROI

Client – Centric Demonstrated…

- Cover letter
  - Concise
  - Key point
  - High-level solution
  - Key competitive advantage
  - Ask for business
- Case studies
  - Business problem
  - Your action taken
  - Results and benefits
- Title page
  - Benefit
  - Action verb
  - Client’s name
  - Reduce your logo
- Executive summary
  - Simple
  - Clear
  - Bottom-line
  - Short

Dealing with Competition

![Diagram showing strength and weakness]

Proposal Life – Cycle

- Assess needs
- Gather material
- Write drafts
- Edit and review
- Package and deliver

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Technical Communicators

- Facts
- Visuals
- Storyboard
- User–centered
- Mine for information
- Develop persuasion skills

A Proposal Writer Wears Many Hats…

- Project manager
- Analyst
- Consultant
- Writer
- Team player
- Change agent
- ...

Learn More…

- STC
- TechWr-L
- About.Com
- The Foundation Center
- Your own organization

Thank You