



INNOVEST SME
Accelerating Small Business



Writing Effective Formal Proposals

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*All the world
is a laboratory to the
inquiring mind.*

MARTIN H. FISCHER

PREFACE

A good proposal doesn't just outline what product or service you would like to create or deliver. It does so in such a way that the reader feels it is the only logical choice.

This book will take you through each step of the proposal writing process, from understanding why they are writing a proposal; to gathering information; to writing and proofreading; to creating the final, professional product.

*I don't pretend we have
all the answers. But the
questions are certainly
worth thinking about.*

ARTHUR C. CLARKE



UNDERSTANDING PROPOSALS

Proposals are a very unique type of business document. In this chapter, we will explore the proposal writing process, as well as the most common types of proposals. Note that we only provide an overview of the four major types; there are many variations on these types, as well as more specialized categories.

WHAT IS A PROPOSAL?

A proposal is primarily a sales pitch for a product or service that your company offers. It outlines a problem or opportunity that the client has and presents a product or service as a solution.

Proposals can be directed externally (to another organization) or internally (for example, to senior management, in order to gain support for a project or idea). In this book, we will focus on external proposals, but the principles can also be applied to internal proposals.

Proposals can also be solicited or unsolicited. Solicited proposals are written in response to a Request for Proposal (RFP) or Invitation for Proposal (IFP). Unsolicited proposals are those that the organization sends on its own in an attempt to gain new business.

THE PROPOSAL WRITING PROCESS

The proposal writing process has seven major steps.



TYPES OF PROPOSALS

There are four main categories of proposals. Note that these categories can and do overlap – proposals are unique to each situation and each organization.

A **Technical Proposal** is a specific kind of proposal that defines the technical requirements for a project. It also details the approach and complete plan (including time, cost, and resources) for the project. This

proposal is excellent at showing companies how you can easily solve technological problems in their organization, without the need for them to find and hire skilled staff. Although these types of proposals are often read and approved by a technical team, it is important to include an executive summary, introduction, and conclusion that are written for the layman.

As you might imagine, **Sales Proposals** are usually written to convince a new client to purchase a product or service. This is done by building a case for why the client needs that particular product or service, and why you are the best person for the job. These are the types of proposals that we will focus on in this book. Because this type of proposal is essentially a sales pitch, clarity and conciseness are absolutely crucial. Make sure that this proposal focuses on what the solution can do for the customer, rather than the nuts and bolts of the proposed project.

A **Cost Proposal** is an outline of estimated costs. It is usually prepared by a contractor to prepare for project negotiations.

The following items are essential in a cost proposal:

- Solid estimates with backup data
- Detailed breakdown of all foreseeable costs, including material, resources, labor, equipment, travel, administrative expenses, etc.
- Summary of high-level costs for executives
- Professionally prepared disclaimer validating that these are best estimates only

A **Professional Service** proposal is a type of sales proposal that focuses on a professional service offering, such as public relations, marketing, or health care. Because of the focus on service, the following elements are usually included:

- List of the people who will be providing the service and their credentials
- Organization's record of service
- Testimonials and references
- Resources available in the organization

You may also see some elements of the cost proposal, such as a breakdown of labor costs.

ABOUT REQUESTS FOR PROPOSALS

Earlier, we mentioned that the proposal process can be initiated by a Request for Proposals (or RFP). This is a document issued by a company requesting proposals for a particular project. The RFP can be as simple or as detailed as a company likes – it all depends on what they require.

Information commonly requested via an RFP can include:

- Organizational background
- Organization's experience with the requested product or service
- Solution details
- Project timeline and budget
- Customer reference

If you are responding to an RFP always double and triple check that you have included all the information requested. If the RFP details a particular person to submit the proposal to, and a date to submit it by, follow their instructions.

Any RFP requests (such as those pertaining to style, language, format, and/or template) should supersede any company or best-practice policies. If you are not sure which set of rules should take precedence, consult with your manager.

PRACTICAL ILLUSTRATION

Kevin sat in a meeting with his co-worker, Carol. The sales of their product had hit a lull in the last few months, and they were discussing ways to increase sales. Carol said, *“We could offer incentives to our existing customers. That’s also a great way to make the customer feel valued.”*

Kevin said, *“That’s an idea to try. I was thinking that while we do that, we could also send out a sales proposal to Ritcher International to inform them about our new product line.”*

Carol said, *“Have they asked us to put together a proposal?”*

“No,” Kevin said. *“But we could send out an unsolicited proposal, that will focus on what we can do for them, the customer.”*

Kevin and Carol’s team started work on the proposal, and they were rewarded with the company’s time, attention, and interest.

*A writer doesn't
solve problems. He allows
them to emerge.*

FRIEDRICH DÜRRENMATT



BEGINNING THE PROPOSAL WRITING PROCESS

To write a convincing proposal, you must get started on the right foot. This chapter will look at how to determine the purpose of the proposal and gather background information.

IDENTIFYING YOUR PURPOSE AND YOUR AUDIENCE

Your proposal should have a single goal in mind. What exactly will the proposal do? Some examples:

- Convince a customer to buy the WidgetMaster 3000
- Convince a customer to hire you to demolish a building
- Outline the meal planning services that your company provides

Then, identify who the audience will be. Some continued examples from above:

- Bill Smith of Smith Construction Inc.
- The business team at Acme Hotels Ltd.
- The nutrition team and the business team at a local nursing home

Note: When you write your outline later on, you may want to make a note of sections that may have a different audience, such as the executive summary.

PERFORMING A NEEDS ANALYSIS

A good needs analysis must answer four questions:

- Who are the customers of the proposal?
- What do they want or need?
- What do they currently have as a solution?
- What can we offer?

To start, you should answer the first question. You may want to seek results from stakeholders or other interested parties. (For example, if your senior management team has identified a sales opportunity, they may have some thoughts about possible customers.) Keep an eye out for additional customer opportunities during the needs analysis process.

Next, it is time to gather information about the customers. Stakeholders may be a possible source, as are market research studies, company reports, and organizational biographies. At times, you may be in contact with the customer themselves. Make use of open questions to gather as much information as possible.

During the proposal, keep an eye out for new or changing answers to your needs analysis, and adjust your proposal approach as necessary.

WRITING THE GOAL STATEMENT

Once the needs analysis is complete, it's time to write the goal statement. This will help you understand what you want to achieve.

First, identify the type of proposal. Throughout this book, we will be focusing on a generic proposal. However, having a more defined type in mind will help you create a more successful proposal. You may choose a type discussed in the previous chapter (technical, sales, cost, or professional service), or it may be of a different type altogether (such as a non-profit grant proposal).

Next, add in the purpose of your proposal. Finally, bring it all together into the goal statement. This statement typically takes the form: Our <type of proposal> will convince the reader to <desired end result>.

Example

Our technical proposal will convince the customer to upgrade to Snazzy Web Services 2.5.

PRACTICAL ILLUSTRATION

Sharon called up her customer, Michelle, to discuss the specifics of the solicited sales proposal. Sharon asked, *“Michelle, what’s your main reason for shopping around for another program?”*

Michelle said, *“We were working with Computech, but we experienced too many glitches and crashes with their program.”*

Sharon said, *“In past years, we had the same problem with our database. Our experts quickly solved those problems, and currently, our clients report very few issues. The issues they do report are quickly fixed.”* Sharon asked, *“What can we offer your company at this time?”*

She kept using open questions with the customer and received the information she needed. Sharon then used the information to present a dynamite sales proposal to Michelle’s company.

*I try to leave out the
parts that people skip.*

ELMORE LEONARD



PREPARING AN OUTLINE

Now that we have our background information, it's time to start creating the framework for the proposal. The preparation process that we outline in this chapter may seem detailed and comprehensive – and it is. Why? The more detailed and accurate your outline is the more cohesive and persuasive your proposal will be.

With that being said, the outline should not be set in stone. It must evolve as the proposal is being built.

A GENERAL FORMAT

Proposals vary widely in their size and structure. However, most proposals include the following elements, listed in the order that they typically appear in the proposal:

- **Cover Letter:** Like a resume cover letter, this document outlines what your company is, the basic thrust of the proposal, and any conditions (such as a date of expiry). It should be signed by your senior officers.
- **Title Page:** Every proposal should have a title. The title page should include the title, the client's name, and address, the name

of the person receiving the proposal, your company's name, and address, and the date the proposal will be submitted. If you are responding to a request for proposal, the first line of the title page should say, "Response to Requirements," and the proposal number should be listed below the title.

- **Proprietary Notice:** It is always a good idea to outline how the information in the proposal can and cannot be used, shared, and transmitted. Get your legal team's help with this section.
- **Table of Contents:** A list of all the major sections and sub-sections in your proposal. You can use Arabic or Roman numerals; just be consistent. (Tip: Most word processors can generate this for you automatically.)
- **Executive Summary:** This is the most important selling tool in your proposal. It should be aimed at the executives in the client's organization (hence its name). It should outline the proposed solution, why the solution was chosen, project management details, how the product will be handed off to the organization (if appropriate), major benefits that will be realized, high-level cost and time estimates, and why your organization is the best candidate for the task.
- **Introduction:** An explanation of why you are writing the proposal, and an overview of what to expect.
- **Body:** The meat of the proposal, organized by headings (your major points) and sub-headings (sub-points).

- **Summary and Conclusions:** Summarize the main points covered, the proposed solution, and why your organization is the best candidate for the task.
- **Bibliography:** List of resources used in the proposal.

Note: The level of headings that you use will depend on the complexity of the report. Our suggestion: use a minimum of two and a maximum of five.

SPECIAL SECTIONS

In addition to the standard components mentioned in the previous topic, here are some optional components that you might see in a proposal:

- Table of Figures (if there are a lot of illustrations in the proposal)
- Statement of understanding
- Organizational history
- Summary of writer's credentials
- Proposed project timeline
- Cost-benefit analysis
- Benefits summary
- Scientific method
- Budget
- Specific project elements, such as proposed product design, marketing plan, schedule, etc.
- Problem analysis
- Glossary of jargon, technical terms, etc.

CREATING A FRAMEWORK

Once the standard components and any special sections are outlined, it is time to build the body of your proposal. To start, outline the major points that your proposal will contain.

Example

1. Cover letter
2. Title page
3. Proprietary Notice
4. Table of Contents
5. Executive Summary
6. Introduction
7. History of Helicopters in North America
8. Local History of Helicopters
9. Helicopters Today
10. An Overview of the Jetking H176
11. Summary and conclusions
12. Bibliography

Remember, this is just a guideline – you can move sections around and add additional points as you perform your research and write the proposal.

GETTING DOWN TO DETAILS

Once you have your main points outlined, add the supporting or sub-points beneath each heading. As we mentioned earlier, we recommend at least two sub-points (and a maximum of nine) per heading. If you can't find two sub-points, you may want to combine that major heading with another one.

Example

1. Cover Letter
2. Title Page
3. Proprietary Notice
4. Table of Contents
5. Executive Summary
6. Introduction
7. History of Helicopters
8. Helicopters Today
 - 8.1. Search and Rescue Functions
 - 8.2. Military Operations
 - 8.3. Training Functions

9. An Overview of the Jetking H176

9.1. Search and Rescue Functions

9.2. Military Operations

9.3. Training Functions

10. Summary and Conclusions

11. Bibliography

PRACTICAL ILLUSTRATION

Steven sat across from his co-worker, Sarah, in her office. After Steven finished the first draft of his outline for her technical proposal, he needed someone he trusted to proofread it.

Sarah said, *“Your cover letter and title page looked great. I couldn’t have written the executive summary better myself. There were a few questions I had about the body of the work, but they are mostly self-explanatory. ...”* She pointed out one particular note. *“It seemed like you tried to write the Proprietary Notice yourself, right?”*

Steven nodded. *“I did. It was difficult to put together.”*

Sarah said, *“I noticed. You’ll want to get our legal team to help you with that.”*

Steven said, *“Thanks for your feedback, Sarah. I definitely needed it.”*

Steven sought out the legal team’s help, and he presented a clean, crisp, proofread outline afterwards.

*Research is to see what
everybody else has seen,
and to think what nobody
else has thought.*

ALBERT SZENT-GYORGYI



FINDING FACTS

Now that we have an outline built, it's time to find facts to support our headings and sub-headings. In this chapter, we will look at what sources you can use and how to organize your information.

IDENTIFYING RESOURCES

Before writing can begin, you must gather facts to support the proposal.

- Observing and interviewing
- Company employees
- Company documents and reports
- Consultants if they are available to you
- Industry experts (with credentials for their expertise)
- Reports from accredited organizations
- Scientific studies
- Publications such as journals and magazines
- Books

Always get the original documentation. For example, if an employee gives you statistics from last year's financial statement gather a copy of the

statement yourself and verify the statistics. Make sure to properly source the documentation in your report.

USING THE INTERNET AS A RESOURCE

The Internet can be an excellent resource for gathering information if it is used properly. You need to make sure that the information you gather is reliable and credible.

Some tips:

- Only use information from accredited, reliable organizations (such as the government, major non-profit organizations, and accredited institutions).
- Always go directly to the source to get your information. For example, if you find a blog that references an interesting study, track down the study and use its information during your proposal.
- Use the Internet to find offline resources. For example, you may need to contact an organization by phone or e-mail to get the report that you need.

Remember that your outline is just a guideline. If you find additional information that you feel is pertinent, review the outline to see where it can be included, and revise as necessary.

ORGANIZING YOUR INFORMATION

Information should, naturally, be organized by heading and sub-heading. Within those groupings, however, there are some other ways to organize information.

The most common choice for a proposal is from problem to solution. This means that a sub-heading section would start with a problem statement, spend several paragraphs outlining the options (making your organization's offering seem the most attractive), and offer a conclusion at the end.

Some other methods include:

- Chronological order (most recent to oldest, or vice versa)
- By level of detail (simplest to most complex, or vice versa)
- By importance
- Separated by pros and cons, with a conclusion at the end
- By offering a question and then an answer

PRACTICAL ILLUSTRATION

Donna finished the first draft of her proposal the night before, and in the morning, she took a copy to her co-worker, Anthony. She was hoping that he might hone in on some areas that needed revising.

Anthony read over the proposal. When it came time to talk about the bibliography, he noted, *"I see that many of your facts and statistics come*

from online resources, which is great. The internet is a fantastic resources for information gathering. However, here you cite an online blog as a resource.”

Donna said, *“Did I not cite it correctly?”*

Anthony said, *“No, you did. But I’d suggest finding the study that the blog is using. That way your information is coming from the most credible source.”*

Donna said, *“Good idea. Thanks, Anthony.”* With a little digging, she found the study and included it in her proposal.

*The role of a writer
is not to say what we all
can say, but what we are
unable to say.*

ANAÏS NIN



WRITING SKILLS (I)

The research is done, the outline is complete, and you're ready to write, right? Hold on just a moment! Before you dive into your word processor, let's review some basic writing skills.

SPELLING AND GRAMMAR

Paying attention to proper spelling and grammar is general good practice, and it will make your editing process a lot easier. Although you don't need to worry about perfection at this point, it is worthwhile to keep some basic spelling and grammar tips in mind.

- Remember basic rules, such as, *"I before e, except after c, and when sounded like a, as in neighbor and weigh."*
- Proposals should usually use the third person (it, they), or rarely the second person (we). Never use the first person (I, me, she, and he).
- Acronyms and texting slang do not belong in a proposal (or in any business document, for that matter).
- Watch for correct spelling but incorrect usage, such as, *"Their were too many ponies in the stall."* This is one of the biggest

things that spell check misses (although Microsoft Office is now capable of checking for it).

- Know what errors you commonly make so that you can make an effort to correct them.
- Writing well takes practice. Read and write often!
- Invest in at least one good grammar reference book. Strunk and White's The Elements of Style is a classic, while Lauren Kessler's When Words Collide is a more recent, accessible desktop reference. A good dictionary and thesaurus are an essential purchase.
- Make use of available tools, such as spell check, dictionaries, thesauri, and people directories. (Note that we said spell check is a tool, not a solution – it can be wrong, too!)
- If you are stuck on a sentence, try reading it out loud. Or, highlight it and come back to it later.
- Always re-read your work. Have someone else read it too, if possible.

WORKING WITH WORDS

Choosing the correct word can make the difference between comprehension and confusion. Take the time to make sure your words reflect what you really want to say.

Some things to watch out for:

- Proposals should be objective rather than subjective. This means leave your opinions out! For example, instead of saying, “*Last year’s numbers were abysmal,*” give the exact statistic and let the reader draw their own conclusion.
- Include the appropriate level of detail in each sentence and paragraph. Too little detail will leave the reader confused; too much detail and they may become bored. (This is where a good understanding of your audience comes in handy.)
- Check to see if you have said the same thing in different ways. This will help make your writing as concise as possible.
- To see if you have used the right word, try substituting synonyms for your chosen word. For example, what does each of these sentences mean to you?
 - The ruling was fair.
 - The ruling was reasonable.
 - The ruling was just.
- Be very careful when using jargon, slang, and acronyms. Provide a glossary if necessary.
- As we mentioned earlier, watch out for instances where you have spelled the word correctly, but used it incorrectly. This is a very common mistake.

CONSTRUCTING SENTENCES

There are three main types of sentences:

- Simple: A single idea expressed with one subject and one verb. (Jim went to the store to get ice cream.)
- Compound: Two ideas expressed together. (Jim went to the store to get ice cream and got lost on the way.)
- Complex: A single idea, with a dependent idea. (Jim went to the store to get ice cream after he ate supper.)

Note that in the compound sentence, the secondary part ([he] got lost on the way) would make sense on its own. In the complex sentence, the dependent idea (after he ate supper) cannot stand on its own.

Sometimes, you will also see compound-complex sentences. (Example: Jim went to the store to get ice cream after he ate supper, but got lost on his way.)

In general, keep your sentences as short as possible; ten to fifteen words is the optimum length. If you have used “and” or “but,” or punctuation such as a comma or semicolon, see if you can break the sentence up. Peoples’ attention spans are getting shorter every day, meaning they are more likely to read short paragraphs with short, easy to read sentences.

Another trick to maximize comprehension is to use parallel construction. This means that if you are using several verbs, make them the same tense.

Which sentence is easier to read?

1. *Some common ways of losing weight including joining the gym, walk every day, and having worked out with your family.*
2. *Some common ways of losing weight including joining the gym, walking every day, and working out with your family.*

As you might guess, the second sentence uses parallel construction.

PERSUASIVE WRITING

Did you know that there are some things that everyone responds to? Include these six items in your proposal wherever possible, and you're guaranteed a "yes" on at least some of your points.

- **Consistency:** Make sure your proposal is sending a clear, consistent message. (This is where your goal statement can come in handy.) It is also helpful if your organization is sending the same message.
- **Reciprocity:** Give your clients something – they will feel compelled to give back.
- **Social Validation:** People tend to follow the crowd. If possible, show how elements in your proposal were successful for people known to the proposal audience.
- **Likability:** Be friendly in your proposal. You will not win by badgering, bullying, or insulting.

- **Authority:** Establish why you are the experts in this area, and why you are the right people to be making this proposal.
- **Scarcity:** Special offer! While supplies last! Limited time only! Create a unique element and, if possible, a sense of urgency and importance in your proposal.

MASTERING VOICE

There are two voices in writing:

- Active voice, where the writer is doing something. (Example: I bounced the ball.)
- Passive voice, where something is being done. (Example: The ball was bounced.)

Generally, the active voice is stronger, crisper, and more persuasive. It should be used whenever possible. However, the passive voice is useful when you are delivering bad news, or when you are not sure who performed an action.

PRACTICAL ILLUSTRATION

William presented the first draft of his proposal to his manager, Elizabeth. He had an excellent working relationship with Elizabeth, and she had offered to give him feedback.

At one point, Elizabeth stopped and said, *“I can see here that you’re trying to convince your customer that they need your product, which is exactly*

what you should be doing. However, you use the words ‘Last quarter productivity dropped, and this is unacceptable for your company.’”

William asked, *“Does that come off too negative? I was trying to be direct.”*

Elizabeth said, *“Instead of giving your opinion, give them the statistic and leave it at that. That way they have the objective information, and they can draw that conclusion themselves.”*

William changed the wording, which improved his proposal. This small change, along with many others, led to his proposal’s success.

*The worst enemy to
creativity is self-doubt.*

SYLVIA PLATH



WRITING SKILLS (II)

Now that we've got the basics of words and sentences down, let's move on to creating paragraphs and linking them together. We'll also look at some ways to check your writing for clarity and readability.

CREATING PARAGRAPHS

A basic paragraph is simply a collection of sentences. A good paragraph, however, is much more than that.

- It has a beginning, middle, and an end.
- It focuses on one theme or idea.
- It ties to the paragraphs before and after it to help build to a logical conclusion.

Typically, paragraphs are structured like this:

- The beginning should state the key theme in one sentence.
- The middle should provide support for the key theme in three to five sentences.
- The end should summarize the key theme in one sentence. It can also provide solutions, give answers, or transition to the next paragraph.

The length guidelines that we have provided here are just that – guidelines. To keep the reader’s interest, you should vary the length of your sentences and your paragraphs.

CREATING STRONG TRANSITIONS

Creating smooth transitions between paragraphs can be a tough task, but it will make your proposal much more effective and much easier to read. It will also help the reader draw a logical path between your points, to your conclusion.

To transition a paragraph, find a common theme between the first paragraph and the second. Then, use that theme as the paragraph’s opening sentence. To cement things together, start your sentence with a transitional word or phrase. Some examples:

- However
- Also
- Likewise
- Consequently
- Previously
- On the other hand
- In conclusion
- To illustrate
- In contrast

Remember, good transitions take time and practice. The payoff will be a stronger proposal and a more convinced reader.

BUILDING TO CONCLUSIONS

There should be several levels of conclusions in your proposal.

- Mini-conclusion at the end of each paragraph, tying the main points together, and transitioning to the next paragraph (if appropriate).
- Conclusion paragraph at the end of each part of a section (sub-section, sub-sub section, etc.), tying all the paragraphs in that section together.
- Conclusion paragraph at the end of each major section, tying all the sections together.

When writing a conclusion, try asking yourself, “*So what?*” to help build a strong case. Example:

- In this paragraph, I am saying that the WidgetMaster can improve assembly line consistency by 45%.
- So what?
- Assembly line problems account for 95% of product defects.
- So what?
- The WidgetMaster can help reduce product defects by improving consistency in the assembly line by up to 45%.

Make sure that each conclusion supports your main proposal goal. If it doesn't, that section may need to be revised or eliminated.

PRACTICAL ILLUSTRATION

Edward and Mark sat down to look at Mark's second draft of his proposal.

Edward said, *"There's still something that's still bothering you about it, isn't it?"*

Mark said, *"There is! And I just figured it out. It's the conclusion paragraph at the end of this section. It feels like when you wrote it, you just were running out of steam."*

"I was," Edward admitted. *"What do you think it needs?"*

Mark said, *"Whenever I get stuck at the conclusion, I ask myself a question. In this case, it would be, 'The EasySell can improve line efficiency by 55%. So what?' Say why it can help. Say why it solves the problem."*

Edward grinned. *"That's perfect. That's just what it needs."*

Later that month when Edward delivered the proposal, he was confident that it would catch the attention his customer.

*How do I know
what I think until
I see what I say?*

E. M. FORSTER



WRITING THE PROPOSAL

It's finally time for the real purpose of our journey: writing the actual proposal. This chapter will look at some tools to help you write your first draft.

EDUCATING THE EVALUATOR

While writing your proposal, always ask yourself: what will the person reading this proposal receive from this sentence/paragraph/section? After all, your audience must be able to understand your proposal to approve it! Here are some key tools to help you educate your evaluator.

Statement of Understanding: This is an optional section of the proposal, but it is very useful if you are presenting a proposal to solve a client's problem. This section contains a statement reflecting your understanding of the problem. This is a great opportunity to show that you have done your research about the client's business and that you understand their needs.

Benefits Analysis: A benefits analysis should be included in all proposals. This section will highlight the advantages to the reader if they approve your proposal. If appropriate, costs for each benefit can be included. Just

make sure you have some solid numbers to offer, and communicate that this is an analysis only and not a guarantee of results.

Organizational Impact Statement: This section can be used to outline the impact on the client's organization. This is an excellent section to outline "soft" benefits (those without a hard dollar value) if you have included a cost-benefit analysis.

Some examples could include:

- Improved customer confidence
- Alignment with industry standards
- Process standardization and improvement

GHOSTING THE COMPETITION

When writing the proposal, make sure to include alternate solutions, and to show why they are not appropriate. Whenever possible, highlight the deficiencies in other approaches to the problem, and how your proposed solution does not have those areas of weakness. For maximum impact, structure this analysis in terms of risk mitigation and maximum benefit for the client reading the proposal.

While you are ghosting, do not forget to include your own company. Point out where possible weaknesses or problems can occur (especially if they are well known) and why these issues will not be a concern for the client.

Example

We offer off-site data backup because we realize that many companies, including your own, operate in areas with volatile weather systems, making total facility destruction a real possibility. Off-site data backup ensures that the risk of data loss is fully mitigated. No other data storage offering combines off-site data backup with 24-hour remote maintenance and the option of a tertiary satellite backup.

USING ILLUSTRATIONS

A picture is worth a thousand words... if it is done correctly. Let's look at some tips.

Some overall tips for diagrams:

- Only use an illustration if it helps to convey your point.
- Make sure to use the proper type of illustration, particularly if you are using a chart.
- Each illustration should convey one major point.
- Where possible, construct diagrams using a computer.

If your proposal includes many illustrations, number each sequentially and include a Table of Figures at the beginning of your proposal. (Many word processors can do this for you automatically.)

| Type | Description | Example(s) | Tips |
|--------------------|---|--|--|
| Charts / Graphs | A visual display of numerical data. | Pie charts, line graphs | Use clear colors and consistent formatting. Make sure that clear legends and labels are included. Only include pertinent data. |
| Diagram | A visual display of non-numerical data. | Process flows, matrices, organizational charts | See tips for “Charts and Graphs.” |
| Snapshot | A photographic picture. | Picture of the product you are proposing | Make sure that the photograph looks professional, has good lighting, and clearly depicts what you want to illustrate. |

PRACTICAL ILLUSTRATION

Jennifer went over her proposal with Jeff. She wanted to make sure that it made sense and sounded logical to someone much like her customer.

When she asked Jeff for feedback, he said, *“I think you did a great job of outlining the problems your customer will run into if they choose to go with your competitors. That part was very clear to me.”*

Jennifer asked, *“Was there anything that you would change or add to that part?”*

Jeff said, *“You know, you focus so much on why this customer shouldn’t go with your competitors that you forget to talk about your own company. Be sure to talk about the problems they might face and why your company won’t be a concern.”*

Jennifer took notes and added in Jeff’s suggestion. When her customer received her proposal, she received positive feedback.

*Never use a 50-cent
word when a 10-cent
word will do.*

ANONYMOUS



CHECKING FOR READABILITY

Once your proposal is written, it's time to check it for clarity and readability. This chapter will offer you some tools to do just that.

CHECKING FOR CLARITY

Use the following checklist to help make sure your writing will be clear to your readers.

- Have I used words with their correct meaning and in their correct context?
- Have I used punctuation appropriately?
- Have I used jargon or slang? Should I explain myself?
- Have I used the active voice wherever possible?
- Are my sentences clearly constructed?
- Do my paragraphs transition well?
- Have I primarily used the third person?
- Does each paragraph have a logical beginning, middle, and end, focused around one idea?

- Does each paragraph, sub-section, and section tie back to the goal statement?

READING FOR YOUR AUDIENCE

As a final check for clarity, try to anticipate any questions that your audience may have. Things to check for include:

- Have you used jargon that needs to be explained?
- Have you written at an appropriate level?
- Are all sections written for the correct audience? (For example, if you have written a technical proposal, the body may be written for a technical audience, while the executive summary may be written at a higher level.)
- Have you provided enough background information?
- Do your supporting points clearly lead to a conclusion?

If at all possible, have someone similar to your audience read your proposal and highlight areas that need clarification.

USING THE READABILITY INDEX

Another tool for checking the clarity of your writing is the Gunning Fog Index. The index takes a sample of writing, performs calculations on it, and outputs the level of education (for example, Grade 9) that a person will theoretically need to read it.

Most business documents, including proposals, should be written at a grade eight or nine level.

Here's how to use the index. First, mark out a full passage of about 100 words. (Don't cut sentences off.) Then perform the following calculations:

1. Count the number of words.
2. Count the number of sentences.
3. Divide the number of words by the number of sentences. This will give you the average sentence length.
4. Count the number of words with three or more syllables (also known as polysyllabic words). Exclude the following words: proper names, jargon, compound words, and words with a suffix (such as ing, es, ed, and etc.).
5. Divide the number of polysyllabic words by the number of words in the passage. Multiply by 100. This is the percentage of complex words in the passage.
6. Add the average sentence length to the percentage of complex words.
7. Multiply this total by 0.4 to get your fog factor.

PRACTICAL ILLUSTRATION

Larry met with Nina, who had read over the first draft of his sales proposal. From her compliments, it appeared that most of his proposal was well-

written and answered the questions that his audience would want answered. Nina said, *“May I offer some constructive criticism?”*

“Sure,” Larry said. *“I don’t see how the proposal can improve without some criticism.”*

Nina said, *“I remember that you told me that you come from a background in technical proposal writing. While that definitely prepared you for writing a sales proposal, some of the jargon you used might be great for a technical proposal, but definitely stood out on this proposal.”*

“What do you think I should do?” Larry asked.

Nina said, *“My advice? Either explain the jargon well enough that your customer understands, or just replace it altogether with sales terms.”*

Larry took Nina’s advice, and it improved his sales proposal.

*There is no great writing,
only great rewriting.*

JUSTICE LOUIS BRANDEIS



PROOFREADING AND EDITING

With all the hard work you've put into your proposal, the last thing you want is for it to be tossed into a corner because of problems with the presentation or spelling and grammar errors.

Even if someone else will be editing your work, you should always proofread and edit your writing before handing it off. This way, you can make sure that you said what you really meant to say.

Remember: A good editor is like a good plastic surgeon – after they're done, you should be able to tell that things are better, although you can't tell exactly what has changed.

PROOFREADING LIKE A PRO

When we read a document, we don't read every word. Instead, our mind scans each sentence to gain overall comprehension. This makes it tough to spot and correct errors.

Here are some tips to proofread like a pro:

- Set up an environment conducive to editing, with good lighting, minimal distractions, and all the tools you need.

- Make a conscious effort to read slowly.
- Read the document several times.
- Try reading out loud.
- Make a checklist of errors that you will be looking for.
- Try reading in the opposite order: from the bottom to the top of the page, and from the end to the beginning of a paragraph.
- If you're not sure what a word means, or if it has been used correctly, look it up.
- Expect to find mistakes.

EDITING TECHNIQUES

Editing is different from proofreading in that proofreading mainly focuses on spelling and grammar, while editing looks at the clarity, accuracy, and consistency of the document as a whole. Therefore, it is important to understand exactly why you are editing the document:

- For spelling and grammar (and therefore focusing on proofreading)?
- For general writing elements (such as ensuring that sections each prove a specific point, that all points lead to the conclusion, and that the document is clear and concise)?
- For specific proposal elements (such as the introduction, statement of understanding, and executive summary)?
- For layout, formatting, and presentation?
- For factual accuracy?
- For illustrations?
- For all of the above elements?

In a peer review setting, the editor notes recommended changes and then hands the document back to the writer for revision, so make sure your editing marks are clear. Electronic review may be particularly useful if there are multiple reviewers.

CHECKING THE FACTS

Fact-checking is an important part of the proposal editing process. The fact checker's sole goal is to review the information in the proposal and make sure that it is factually correct.

Key items to check include:

- Validity of quotes from people
- Mathematical calculations
- Presentation, analysis, and interpretation of studies
- Phrasing of statistics (for example, use of words like always, exactly, never)

The fact checker must also ensure that first-hand information is available. For example, if a scientific study is quoted, that study must be available, not another item (such as a newspaper article) quoting it.

THE POWER OF PEER REVIEW

Peer review should be a mandatory component of any proposal writing process. Typically, your peer editor reviews the document, and then gives you feedback to incorporate into the proposal.

Why is peer review so important? First, because of the way the human brain works, it is physically impossible for you to see many of your own errors. Second, having someone else read your work will help ensure that you have included all points to make a logical, clear case. Third, everyone has their personal areas of writing weaknesses, and peer review will help compensate for those weaknesses.

PRACTICAL ILLUSTRATION

John sat in his study, looking over the sales proposal that he'd just finished writing. In the past, he had gotten feedback from co-workers and supervisors that his work often needed more proofreading. This often led team members and supervisors to find more errors in his writing than he would prefer. John knew that he didn't want to get the same feedback once again, so he tried something different this time.

John made sure that he was in a quiet, well-lit area. He read through the document several times, and then he read the document out loud, to catch wording and phrases that needed to sound smoother. Finally, he took out a list of errors that he often made and double-checked the proposal.

Once John proofread the document using his new skills, he felt confident sending out the first draft as a .pdf file to his supervisor.

*For me, writing is
hard work. I always look
forward to drawing
the pictures.*

MARC BROWN



ADDING THE FINAL TOUCHES

Your proposal has been thoroughly researched, brilliantly written, and carefully edited. But if it's in an eight point font, all of your hard work will likely go unnoticed. This chapter will show you how to present your proposal in a professional way.

OUR TOP TYPESETTING TIPS

It should go without saying that all proposals should be prepared electronically. With that being said, most word processing programs offer hundreds of fonts, plus the ability to apply a myriad of effects and add many enhancements.

When preparing your proposal, remember that less is more. For maximum readability, follow these guidelines:

- First and foremost, respect company policies and any requirements set out by the client. Their rules supersede anything you may read here.
- Use a maximum of two font faces: one for headings and one for the body.

- Establish a consistent formatting scheme throughout the document.
- Use common fonts, such as Times New Roman, Calibri, Arial, or Verdana.
- If you use font effects, use them sparingly, and stick to the basic effects (bold, italic, and underline).
- If your word processor offers a consistent way to use formatting (such as styles or themes), make use of it.

ACHIEVING A PROFESSIONAL LOOK AND FEEL

In addition to clean, consistent fonts, there are a few other things that you can do to give your proposal that extra touch.

- Use plenty of white space.
- Give your proposal a title and create a title page.
- If the document contains signatures, get everyone to sign in the same color ink. Use the same pen if possible.
- Use consistent headers and footers that include page numbers.
- Ensure all components (headers, footers, illustrations, text, cover pages, etc.) match.
- Remember, less is more!

CREATING THE FINAL PACKAGE

If the proposal is to be printed, you will want to make sure that its appearance reflects all the hard work put into it. Some tips:

- Print the proposal in color.
- Use good quality white paper, with dark blue or black type.
- Make sure that all sections are present and that all pages are in order.
- Include a blank page at the end.
- Simple, professional binding, such as spiral binding or an elegant three-ring binder can make a big impact.
- A disc that includes an electronic copy of the proposal and any key documents can be added to the paper copy (for example, in a pouch at the back of the binder).
- Keep printed copies clean and dry.
- If corrections need to be made, make them in the word processor and print new copies. You can also create an errata sheet and add it to the beginning of the proposal.

If you are mailing the proposal, use a manila or padded envelope big enough to contain the proposal, without folding it. Spend the extra money to courier it, rather than tossing it in the mail.

If it is to be e-mailed, choose a commonly used format, such as PDF. Make sure the file is small enough to be transmitted to all parties. Be sure

to include a subject line and brief note, or even the cover letter, in the body.

PRACTICAL ILLUSTRATION

Lisa let out a breath of relief. Mary, her supervisor, had helped her proofread and edit her proposal. It was due to be presented in the next week, and the two of them had worked hard to complete the proposal.

Lisa said, *“Well. It looks like it’s a finished project. Wouldn’t you say?”*

“I would!” Mary said. *“However, now is not the time to relax. Now is the time to package our proposal perfectly.”*

Lisa smiled. *“What would you suggest?”*

Mary opened up her laptop. *“Let’s go to an office supply store website. They have some excellent binders and good quality paper that will show off all the hard work you’ve done.”*

They chose special items, and they printed out the proposal in color to really make it pop.

*Management is doing
things right; leadership is
doing the right things.*

PETER DRUCKER

CLOSING THOUGHTS

- **Olin Miller:** Writing is the hardest way of earning a living, with the possible exception of wrestling alligators.
- **Stephen King:** I believe the road to hell is paved with adverbs.
- **Jules Renard:** Writing is the best way to talk without being interrupted.



Rick Chisholm made history when he single-handedly changed the professional Audio Visual industry by breaking all the rules and capitalised over 50% market share in Australia with very little capital, no partners, mergers or lenders and set up the first franchise operation of its kind in the world in the late 1990's and early 2000's.

As a 7x founder of companies and 30x businesses such as Innovest, AI Machine, Lightsounds, LSW, Light Emotion with revenue in excess of \$300 million and having employed more than 1,000 staff over the last 35 years. Rick is known as the Start-Up and SME Guru and is Author of a number of books including Business Success for Life. Unlike many mentors, he actually walks the talk and has a number of businesses under management in such areas as Automation, Events management, Importing, Distribution, Retailing and E-commerce.

His BIG passion is Business Education empowering Businesses Owners through knowledge and skills. Whilst Rick has experienced great success, he has also endured many failures. Rick has faced and overcome the exact same challenges you are facing now.



Tala Chisholm is an SME specialist who has owned and managed several small to medium sized businesses in the last 20 years, several of which were eventually sold. She has extensive experience in the fields of retail, franchising, licensing, dealerships, education, importing, distribution and consulting.

Her expertise lies in building and implementing customised cross-platform database and software solutions for businesses, automation, IT, web marketing, advertising, graphic design, business administration, process refinement and implementation. Her business experience ranges from bricks-and-mortar Giftware retailing to highly technical fields such as Security, CCTV, Entertainment Lighting and Audio sales, hire and installations as well as e-commerce.

Throughout her career she also trained and mentored Franchise business owners as well as internal division managers. Some areas of training included retail operations, management practices, business strategy, accounting, cash-flow, marketing, customer service and IT. She has also headed up the drafting of Operating Compliance Manuals for Franchise operations and implementation of all the elements involved.

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