Bid & Proposal Writing

Understand the best practices, recent trends, common pitfalls and misconceptions when writing bids and proposals

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Use this section as a study guide for APMP's Bid & Proposal Writing Micro-Certification.

Compliance and Responsiveness

Introduction

Throughout the opportunity process, your customer shares their requirements with you. Identifying those requirements is necessary to ensure that you capture and address them all, including those shared with you prior to the release of the RFP.

Your customer may have even implied or verbalized requirements that don't appear in the solicitation document. Yet, these are still important to your customer. To create a customer-focused response, you need to identify, collect, and organize all requirements in a compliance matrix, whether or not they appear in the solicitation.

Requirements identification is even more crucial when you are preparing an unsolicited proposal. Correctly and thoroughly documenting your customer's requirements and issues is essential to preparing a winnable proposal and can influence your customer's evaluation and feedback. It can also determine whether your unsolicited proposal wins the work.

Compliance is the act of meeting stated customer requirements. A compliant proposal meets the customer's requirements and submittal instructions, answers the customer's questions, and addresses specifications—nothing more, nothing less.

Compliance includes:

- Structuring your proposal per the customer's instructions
- Staying within page limits
- Adhering to formatting guidelines, such as font size, style, and margin size
- Meeting each RFP requirement

A non-compliant proposal will likely be rejected. In any government market, a non-compliant winning proposal may be protested by the competition.

Responsiveness goes beyond compliance. Responsive proposals address your customer's goals, underlying concerns, and key issues and values that might not be spelled out in the solicitation. Responsive proposals help customers achieve their business goals, not just their project or procurement goals.
Responsiveness includes:

- Understanding your customer's stated and implied needs and addressing them in your response. This shows that you are aware of what your customer is trying to achieve and that you are empathetic toward them.
- Demonstrating that you "get it." Responsiveness allows you to show your customer that you know why their requirement is important.
- Describing the benefits your customer will gain from your solution. Tell your customer the advantages and value that your solution will bring to them.
- Editing your writing to speak the customer's language and use their terminology.
- Pricing your proposal within your customer's budget.
- Demonstrating alignment to the customer's beliefs and culture.
- Showing evidence the customer is safe in your hands.

It's possible to be compliant without being responsive, and vice versa. The best proposals are both compliant and responsive.

Why being responsive is key to winning

In today's increasingly competitive marketplace, compliance alone does not win. A bidder must work with the customer before the RFP release to understand their hot buttons and then clearly address them in the proposal.

Compliance can prevent your proposal from being eliminated, but responsiveness gets you ahead of the competition.

For example, if your bid and your competitor's bids are both 100% compliant with the requirements, how does your customer decide whom to go with? If neither are responsive, they will likely decide based on the lowest price (or some externally influenced factor). You want to win because you're the best choice, not because you have the lowest price. Focusing on customer responsiveness gives your proposal an edge other bidders may lack.

Best Practices

1. Cultivate responsiveness before the RFP release.

If you're starting to think about responsiveness after the solicitation has been released, you're too late. Often, your customer's hot buttons won't be stated in the solicitation. To be responsive, you must know your customer beyond the written requirements. The most effective sales professionals build their entire approach and win themes around adequately addressing their customer's hot buttons.

Building a trusting relationship with your customer and understanding their underlying concerns takes time. Start working early in the process to understand your customer's true business needs. Starting early means you can shape your response according to their needs and even help shape their RFP according to your planned response. Continually build your relationship with your customer from early in the business development process through the RFP release.

2. Thoroughly review and understand the customer's bid request.

One of the most common and harmful mistakes proposal teams make is not reading the customer's bid request (typically an RFP). Instead, many teams skim the document, quickly build an outline from the instructions, and dive into writing. How can you ensure full compliance with an RFP if you don't read it in its entirety? Doing so can unveil important connections between requirements, answers to shared questions, and other key nuances. Before the kickoff meeting, find a quiet spot and read the RFP. Ask your team to do the same. Or conduct a page turn as part of one of your early team meetings.

After reading (and rereading) the RFP, ensure that you clearly understand what's required. Identify anything that's unclear and could impact your response. Consider seeking clarification from the customer. If you do, be sure to follow their instructions for submitting RFP questions.

3. Prepare a comprehensive compliance matrix for every bid request.

The compliance matrix is a must-have planning document. Always create a compliance matrix, regardless of the bid size or timeline. For unsolicited proposals, white papers, and RFI responses, use the executive summary, introductions, and section summaries to demonstrate your understanding of requirements and compliance.

Create your compliance matrix early in the planning process, before writing begins. Update it throughout the proposal process, after solicitation amendments, customer responses to clarification questions, and proposal outline changes.

A compliance matrix is a powerful tool that different proposal team members use in different ways:

- For the Bid Manager/Proposal Manager, it's the master proposal content planning document
- For the Volume Lead (if used), it's the checklist to ensure all requirements are addressed

- For writers, the compliance matrix is the guide to what should be written in each proposal section—and, if there is no Volume Lead, it's the writers' checklist to ensure all requirements are addressed
- For reviewers, it's an evaluation tool, clearly defining what should appear in each section
- For management, it's the top-level view of the proposal plan and strategy

4. Submit a response matrix with your proposal.

People in selection and evaluation committees often have many other responsibilities. They also may not be familiar with your proposal's technical subject matter. That's why you must make the proposal evaluation process as easy and efficient as possible. Prepare a clearly organized and written proposal that's easy for evaluators to compare to their RFP requirements.

A response matrix is a derivative of the compliance matrix. It's a roadmap that evaluators can use to quickly locate your compliant response to each requirement. You should submit a response matrix with every proposal. This matrix identifies where in the proposal you've addressed each of the solicitation requirements. If page limits don't allow for a separate response matrix in a proposal, include its content as part of section headings.

5. Address non-compliance.

Customers often receive several proposals to evaluate. During the selection process, they look to eliminate offers until only one remains—the winner. Non-compliance is the easiest way for customers to eliminate your proposal, especially in government bidding.

In any circumstance, non-compliance is risky, even if there are rational reasons for deviating from mandatory requirements and instructions. If you know your proposal is non-compliant, there are ways to address it:

- Use the compliance matrix to document whether your solution is compliant and to indicate how compliant it is. Add a column to the matrix to describe how closely your solution matches the requirement. Crucially, supply a justification of why your solution might be less than 100 percent compliant. Customers like (and need) to understand why their requirement can't be met.
- If there are many areas where your solution is non-compliant or only partially compliant, question why your organization is pursuing the opportunity. It may be appropriate to challenge the decision to bid or to recommend a no-bid.
- Sometimes, requirements change during the proposal development timeline. If this leaves your solution with less than 90 percent compliance, it's reasonable to revisit your bid/no-bid decision.

6. Include statements that clearly show compliance.

How should you demonstrate compliance? Your approach may change based on the type of RFP you're responding to:

- **For Q&A RFP responses:** When writing your proposal and addressing a specific question or requirement, start by demonstrating your compliance. Repeat the customer's requirement or question, saying that you will deliver what they've asked for.
- **For proactive/unsolicited proposals, and those without a fixed set of questions or requirements:** List your understanding of the customer's key requirements and make compliance statements (similar to statements in a Q&Aproposal).
- **For RFP responses with stated requirements:** Use a compliance and response matrix.

Regardless of whether requirements come from the customer or from your experience and expertise, be sure to list them and add responsive statements.

For example, your customer might state the following requirement: "You must provide yellow cardboard boxes."

Your compliant statement could be as simple as: "We provide yellow cardboard boxes."

You have clearly stated that you will deliver what the customer requires. You are being compliant.

However, we also want to demonstrate value. This is being responsive.

Imagine your competitor is also able to provide yellow cardboard boxes; in this case, responsiveness will differentiate you from your competitor. The responsive version of your answer should go into more detail:

"Having yellow cardboard boxes is important because you use them to store the valuable items you manufacture. We have learned from other customers who also need durable and protective boxes that the boxes should be lightweight and easy for their employees to carry. Our boxes, which use high-quality materials, deliver on all these important needs. The grade of our cardboard regularly outperforms typical boxes in the industry; see Annex 1 for recent independent third-party test results."

This example demonstrates empathy with your customer's needs and provides relevant, provable benefits, on top of a response to the requirement.

Adding substantiating details can help you differentiate between your offer and those of your competitors. Building on the previous example, you could:

- Provide more specific details on your solution's benefits: "We use ultra-bright yellow dye to color the boxes, increasing their visibility in dark warehouses."
- Include a quote from a current customer: "Thanks to your easy-to-carry yellow boxes, our workers have reported fewer injuries and filed fewer worker's compensation claims."
- Make a statement that includes tangible value: "The higher-grade cardboard we use lasts 25% longer than the typical grade of cardboard used for similar applications." By adding a responsive element to the answer, you've shown you are compliant and have provided additional evidence the evaluator can use to determine that you have the best solution.

7. Maintain a customer focus.

When you understand all the relevant facets of your customer, the hot buttons of their stakeholders, and the project or service you are pursuing, you'll be ready to write a customer-focused proposal. Demonstrate that you understand the customer by citing their vision, project goals, objectives, and hot buttons in your executive summary. Then, weave corresponding theme statements throughout your proposal. After all, if you don't understand what the customer wants, why should they trust you to fulfill their needs?

If you are a customer-focused bidder, you:

- Name the customer first (i.e., before your organization) in each volume, section, or paragraph
- Name the customer more often than yourself
- Clearly say the customer's vision and hot buttons
- Address these issues by presenting benefits before features

Features are relevant only if they offer a true benefit to the customer. Among car shoppers, a powerful engine or a compact design might be considered good features. But what if you're an environmentally conscious, safety-minded parent of four children? A feature that doesn't matter to your target customer is not a feature worth selling in your proposal.

Application in Diverse Environments

Compliance across government and commercial markets

Compliance issues can be more detrimental in the government market than in the commercial market. Government buyers are spending taxpayer dollars and, as a result, are bound by national law and acquisition regulations. If government buyers fail to follow these guidelines, they open themselves up to protest, delays, or procurement cancellation.

In the commercial market, buyers are bound by their entity's own rules and processes. Interpretation of these guidelines and whether or not they have been violated is at the buyer's discretion. While compliance is extremely important to all customers, commercial buyers often have more leeway in what is acceptable.

Responsiveness across different markets, groups, and cultures

Responsiveness can vary across different markets, groups, and cultures. It is important to understand the customs and nuances of your target audience early in the procurement process and clearly reflect this understanding throughout your proposal.

Speak the customer's language—keep in mind:

- Different dialects and spellings
- Jargon across different industries, countries, or military branches
- Military rank abbreviations across military branches

Be sensitive to cultural differences—consider:

- Use of color (e.g., white signifies purity in the United States but death in China)
- Cross-cultural views of gender, age, race, etc.
- Economic climate

Understand your market (government versus commercial)—remember these differences:

- Fiscal constraints
- Interpretation of elaborate graphics, high-quality binding materials, etc.
- Acceptable level of risk
- Laws and regulations

Recent Trends

Increased bid protests in the U.S. federal marketplace

Bid protests regularly occur in the United States, typically due to:

- Larger, consolidated, more complex contracts (more at stake)
- Increased competition (more companies fighting for fewer contracts)
- Inexperienced government contracting personnel (baby boomers retiring)

With the number of bid protests on the rise, government customers have become highly vigilant about solicitation compliance. Complete compliance is a necessity for government bids. Do not let non-compliance be a reason for a potential customer to eliminate your bid, no matter how minor.

Summary

- In today's market, winning proposals are not only compliant, but also responsive to the customer's underlying issues. Compliance and responsiveness are two different but equally important elements.
- It's possible to be compliant without being responsive, and vice versa. Winning bidders are both.
- Fully identifying requirements is a critical step in creating compliant and responsive proposals. Before beginning any work, you should thoroughly review and clearly understand the customer's requirements and bid request.
- Important requirements might not be included in the solicitation
- For every proposal, regardless of size or timeline, you should prepare a compliance matrix that contains requirements
- Make it clear that your proposal is compliant by submitting a response matrix with your proposal. This will also make your proposal easier to evaluate.
- If requirements change, consider revisiting your bid/no-bid decision, especially if you have less than 90 percent compliance across all requirements
- Developing responsiveness begins in the early stages of the business development lifecycle and continues throughout
- Responsiveness can vary greatly across different markets, groups, and cultures

Terms to Know

- Benefit
- Clarification
- Compliance Matrix
- Compliant versus Responsive
- Customer Focus
- Customer Issues
- Customer Requirements
- Feature
- Hot Buttons
- Non-Compliant Bids
- Protest
- Response Matrix

Tools and Templates

- [Compliance-Matrix.xlsx]
- [Response-Matrix.xlsx]

Content Plans

Winning proposal content is planned before it is created. How—and how much—planning you do will vary from proposal to proposal, but the underlying principle is always the same: your team should not start writing until there's a clear and shared view of what the finished product will look like. Without a specific vision of what needs to be created, the finished product will be inconsistent and possibly incoherent. Correcting poor quality late in the process requires rework, causing risk of a late or over-budget proposal.

Proposal planning—like planning for any project—has several established best practices.

Best Practices

1. Implement a systematic approach to designing content.

First and foremost, follow a clear, requirements-driven process for designing your proposal content (see Figure 1). Document the process and support it with guidelines. Provide tools and templates to support the process and training in how to use those tools and templates.

Your process should be flexible enough to accommodate different types of proposal content and presentation as determined by the customer's evaluation process.

Figure 1. Content Development Process. *Content development should be driven by the requirements of the prospect's evaluation process.*

As part of your process, be sure to define all relevant terms. The term content plan embraces a wide range of items, such as:

- Proposal outlines
- Annotated outlines

- Section content plans
- Content plans
- Mock-ups

These terms can mean different things based on individual experience and training. Your process documentation should define the terms and techniques to clarify the intent and planned use in your proposals.

2. Adjust the level of planning if necessary.

Tailor the detail of your content plan according to the time available, the nature and importance of the opportunity, and the experience and size of your writing team. Then, be ready to adjust the level of detail.

The time you invest in content planning should match the likely return on investment. There should be a surplus of benefits over costs. Content planning offers many benefits. It helps writers structure their thinking to better communicate win themes. It improves the consistency of your messages, minimizes overlaps, prevents gaps, and helps ensure compliance.

No benefits are achieved without costs. The main costs of content planning are the time and effort that the Bid Manager or Proposal Manager and the core team spend creating plans before the kickoff meeting. If the returns won't match the time and effort you're investing, or time is restricted, then you must adapt the amount of planning accordingly. For example, if you're working under a tight deadline, you may simply identify the customer's key questions and requirements and develop a content plan for these and the executive summary.

Sometimes, the appropriate amount of planning will be determined by the nature of the proposal solicitation and the required response. In other situations, the return from detailed planning is determined by the sales situation, as shown in Figure 2.

PROPOSAL TYPE	Q&A PROPOSALS	REQUIREMENTS-STYLE PROPOSALS
Description	The proposal request is framed as a series of questions or detailed compliance points. The required response comprises answers to the questions or a statement of compliance. The structure of the response is highly constrained.	The proposal request defines top-level requirements or desired outcomes. The required response is a description of how the outcomes will be achieved. The prospect allows bidders wide discretion in structuring the response

Added value of detailed content planning	Low for more generic, compliance-based and standard company information requests Medium where answers can be based on reusable content but are important to the customer and need customization High for bespoke, high evaluation scoring, client-specific questions, especially where there are restrictive word and character count instructions High for executive summary	High
Advice	Confine planning to the more bespoke and high evaluation scoring elements of the proposal.	Use plans to provide detailed guidance to authors. Plan the content section by section, describing the overall message to be conveyed and specific win themes to be emphasized in each section. Prepare to interview subject matter experts (SMEs) for additional insights.

Figure 2. Determining the Level of Planning Needed. *Organizations should spend the most time planning responses to bid for new customers in need of new products and services*.

Keep in mind, if you have an experienced team that already knows the customer and is writing about existing products and services, then creating detailed content plans won't provide the best return on your time investment. Conversely, when the customer or the products and services offered are new, or the solution and supporting story is complex, detailed content planning is recommended to enable the team to work effectively. Similarly, a high-value, "must-win" opportunity will justify additional investment in detailed content plans.

Content plans communicate roles within the writing team. If the writing team is small, less communication is required. At a minimum, a plan should have enough detail to check that you've covered all the requirements and enable the team to understand who is writing what.

3. Build and manage a requirements baseline for each proposal.

Document the customer requirements and communicate them to the entire team. To document requirements, use a requirements analysis matrix or requirements checklist.

For formal requests, the core team should thoroughly review the customer request. As part of pre-kickoff planning, do the following:

- Strip relevant items within the request that state or imply specific requirements (see Figure 3)
- Ask SMEs to analyze technical and solution requirements and formulate any solicitation questions for the customer
- Pay particular attention to proposalrequirements, including the required:
  - Type of response (e-procurement versus traditional printed response)
  - Format
  - Structure
  - Numbering plan
  - Page limitations
- Design your plan so that it follows the sequence and numbering of the request

3 Project Plan

For the purposes of responding to this RFP the bidder must provide a high level project plan. The plan must be comprehensive enough in scope and detail to convey the bidder's ability to manage this project as specified in this RFP. The plan should also reflect the bidder's mechanism to manage processes interdependencies as well as the sign-off process.
The bidder must indicate in his plan how the status and visibility of project progress will be monitored. Bidders must describe their approach to project management during the implementation and operational phases as well as managing and coordinating different phases and activities of the project.

3.1 Project Change Management Plan

The Bidder shall adhere to the change control procedures of Customer PMT. The bidde must clearly notify Customer officially of any change to the approved project plan in general and its impact with respect to scope, time, cost and resource.

3.2 Project Organization Plan and Stakeholder Analysis

The Bidder shall provide an organization and staffing plan that includes the organization for the management and execution of the project.
Bidders shall develop a stakeholder analysis document that shows all the stakeholders and their requirements, interests and expectations.

3.3 Project Issues & Risk Management Plan

Bidder shall describe their approach to managing risk and issues on the project. The processes and procedures used for managing issues & Risks should align with Customer PMT where appropriate. The logging and tracking of issues and risks will be done using the Electronic Project Management Platform at Customer.

3.4 Project Communications Management Plan

Bidder must describe how project communications will be managed making reference t project status reporting and other communications events.

3.5 Project Quality Management

The Bidder shall provide a quality assurance plan to insure that all deliverables meet the stated requirements of this RFP.

#	Requirement text	Reqt Type	Comply
	3.0 Project Plan		
128.	For the purposes of responding to this RFP the bidder must provide a high level project plan.	Response	Y
129.	The plan must be comprehensive enough in scope and detail to convey the bidder's ability to manage this project as specified in this RFP.	Response	Y
130.	The plan should also reflect the bidder's mechanism to manage processes interdependencies as well as the sign-off process.	Response	Y
131.	The bidder must indicate in his plan how the status and visibility of project progress will be monitored.	Response	Y
132.	Bidders must describe their approach to project management during the implementation phases	Response	Y
133.	Bidders must describe their approach to project management during the operational phases.	Response	Y
134.	Bidders must describe their approach to managing and coordinating different phases and activities of the project.	Response	Y
	3.1 Project Change Management Plan		
135.	The Bidder shall adhere to the change control procedures of Customer PMT.	Solution	
136.	The bidder must clearly notify Customer officially of any change to the approved project plan in general.	Solution	Y
137.	The bidder must clearly notify Customer officially of any change impact with respect to scope, time, cost and resource.	Solution	Y
	3.2 Project Organization Plan and Stakeholder Analysis		
138.	The Bidder shall provide an organization and staffing plan that includes the organization for the management and execution of the project.	Response	Y
139.	Bidders shall develop a stakeholder analysis document that shows all the stakeholders and their requirements, interests and expectations.	Solution	Y
	3.3 Project Issues & Risk Management Plan		
140.	Bidder shall describe their approach to managing risk and issues on the project.	Response	Y
141.	The processes and procedures used for managing issues & Risks should align with Customer PMT where appropriate.	Solution	Y
142.	The logging and tracking of issues and risks will be done using the Electronic Project Management Platform at Customer.	Solution	Y
	3.4 Project Communications Management Plan		
143.	Bidder must describe how project communications will be managed making reference to project status reporting and other communications events.	Response	Y
	3.5 Project Quality Management		
144.	The Bidder shall provide a quality assurance plan to insure that all deliverables meet the stated requirements of this RFP.	Response	Y

Figure 3. Stripping Requirements from an RFP. *Follow the sequence of the request. Number each item as a separate requirement. Distinguish between solution requirements and response requirements.*

For informal requests, use your knowledge of the customer and understanding of the requirement from sources such as meeting records, verbal and written communications, and the account plan. To build your requirements list:

- List known requirements
- Group requirements by category and priority
- Identify conflicts between requirements or with other known issues relating to the request
- Consolidate requirements into a requirements checklist/requirements analysis matrix

Informal proposals could be shaped by the above against the typical starting outline of:

- Executive summary
- Understanding your requirements
- Our recommendations
- Customer examples
- Next steps

Use your requirements checklist to help define your proposal's organization and appropriate content. To trace requirements between the customer request and your written offer, for both formal and informal responses, you can use compliance and response matrices. To create a compliance matrix, add a statement of your compliance or noncompliance with each requirement to your requirements checklist. To create a response matrix, add a reference to your proposal where the requirement is addressed.

4. Create a robust topical outline

Start the content planning process by building a robust topical outline for the proposal. An outline is a list of topics or headings to be covered. Robust means that the outline will support the many demands placed on it and remain stable throughout proposal development.

An outline can take many forms (see Figure 4), from a simple indented list to a detailed computer-based model. Choose an approach that best fits your way of working, the proposal and team environment, and the proposal's demands.

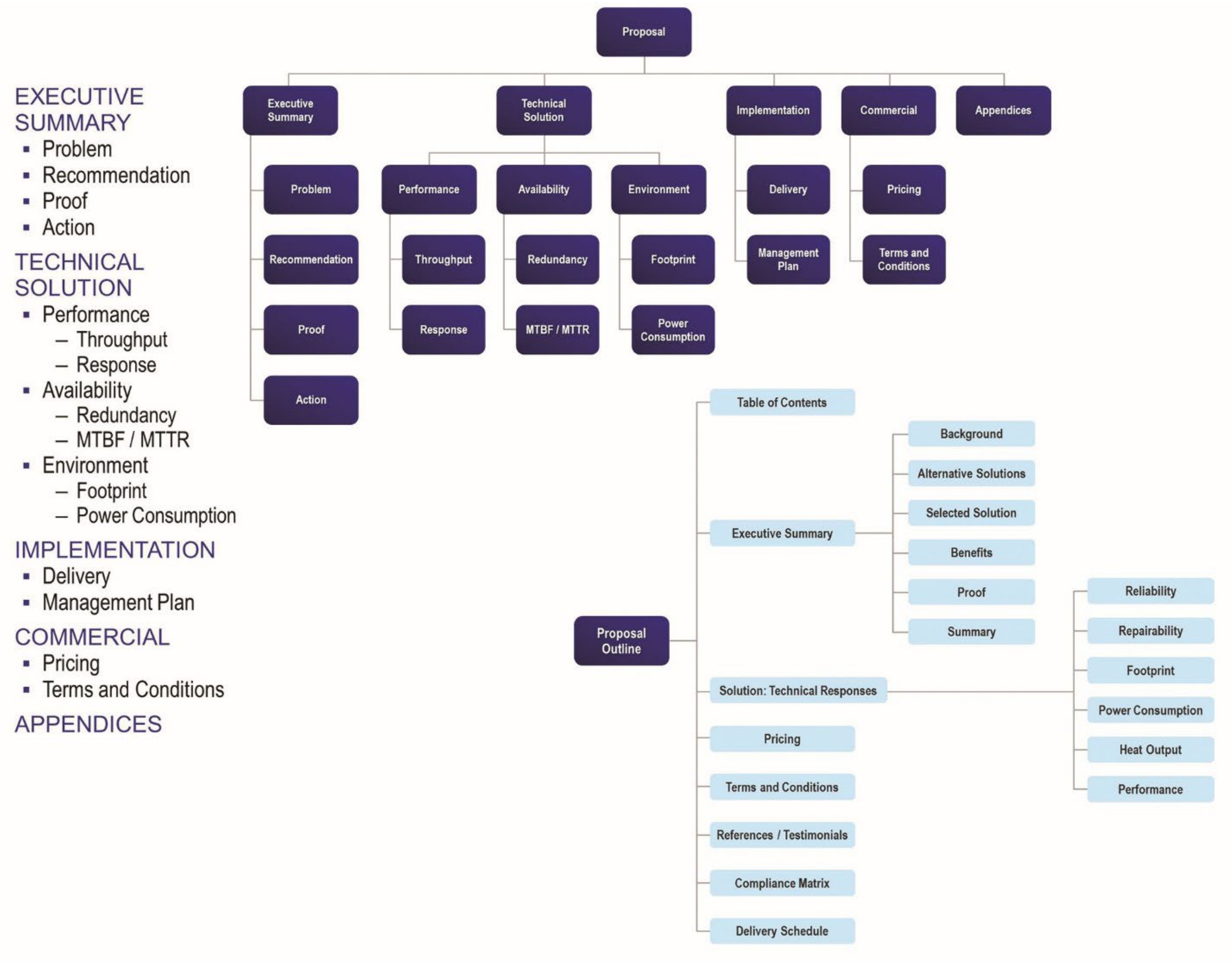


Figure 4. Types of Outlines. *An indented list, hierarchy, or mind map are all valid ways to represent an outline.*

Modern word processing, presentation, and mind mapping tools provide ways to manipulate data in both outline and detailed view. These can later be exported into other formats, such as spreadsheets or databases.

Project management practitioners will recognize that the outline is a product breakdown structure for the planned document. Product-based approaches translate readily into the content planning process.

Making your outline consistent and compliant

Modern word processing, presentation, and mind mapping tools provide ways to manipulate data in outline and detailed view. These can later be exported into other formats, such as spreadsheets or databases.

Making your outline consistent and compliant

To start your outline, follow the instructions contained in the proposal request. This includes:

- Required sections and structure
- Required numbering plan (if one is not given, follow the customer's conventions over your in-house style)
- Required headings and terminology

RFP instructions will typically specify an outline down to the first or second level of numbering. Develop additional detail and structure down to third and fourth levels, taking care not to break the required number plan. Unless the instructions direct otherwise, numbered headings should be restricted to three levels. Fourth-level headings and below should not be numbered, as shown in Figure 5.

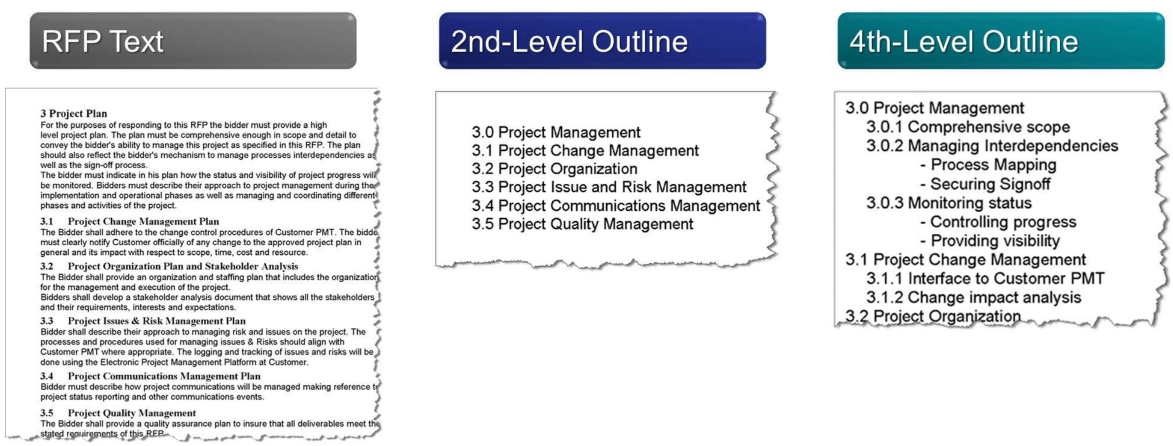


Figure 5. Extending an Outline. *Use the third and fourth levels to add detail to your outline. Add more detail where the evaluation weightings are greatest.*

Follow the customer's requested structure and naming conventions, even if they seem illogical. Non-compliance risks disqualification. If you do deviate from the customer's imposed structure for any reason, explain the deviation and the reason for it in the text. For example, you may want to reduce redundancy or make the content easier for evaluators to read.

Where no structure or numbering plan is imposed, follow the order and numbering of the bid request. The goal of all document design is ease of evaluation. It's easier for the evaluators to score and compare similarly structured responses.

Add detail where the evaluation weightings are highest. The customer may provide evaluation weightings in the tender instructions or the RFP's supporting documentation. If not, use your judgment and knowledge of the customer to determine how the evaluation weightings will be allocated.

Pay attention to page and word count limits, allocating the most space where the available marks are greatest or where you have identified evaluation criteria as critical to the customer. Also address potential customer concerns that may not appear in the RFP, such as your ability to deliver projects on time and within budget. Where the customer does not impose a page limit, establish one. Evaluators do not want to receive proposals that are longer than necessary.

Making your outline robust

When a compliant outline has been developed, it should be further refined to satisfy the following conditions: items in the outline should be mutually exclusive, complete, and exhaustive (MECE) and uniquely assignable.

Is it MECE?

- Are all the topics mutually exclusive? Have all overlaps and duplications been removed?
- Is the outline complete and exhaustive? Have all the requirements been covered?
- Does anything else need to be added? Add any other required content within the topical outline

Is it uniquely assignable?

As part of the planning process, you will assign parts of your outline to specific authors. Could you assign responsibility for each topic or section in your outline to a single author in your team, or does the work need to be subdivided further? If further subdivision is required, can that safely be delegated to one person or team leader?

Review the outline with your team until you're satisfied that these tests of robustness, shown in Figure 6, are met. An outline that has to be changed or responsibilities that have to be reassigned as a result of further analysis or discovery during the development process is not robust. Lack of robustness will lead to confusion, duplication of effort, rework, and potential non-compliance.

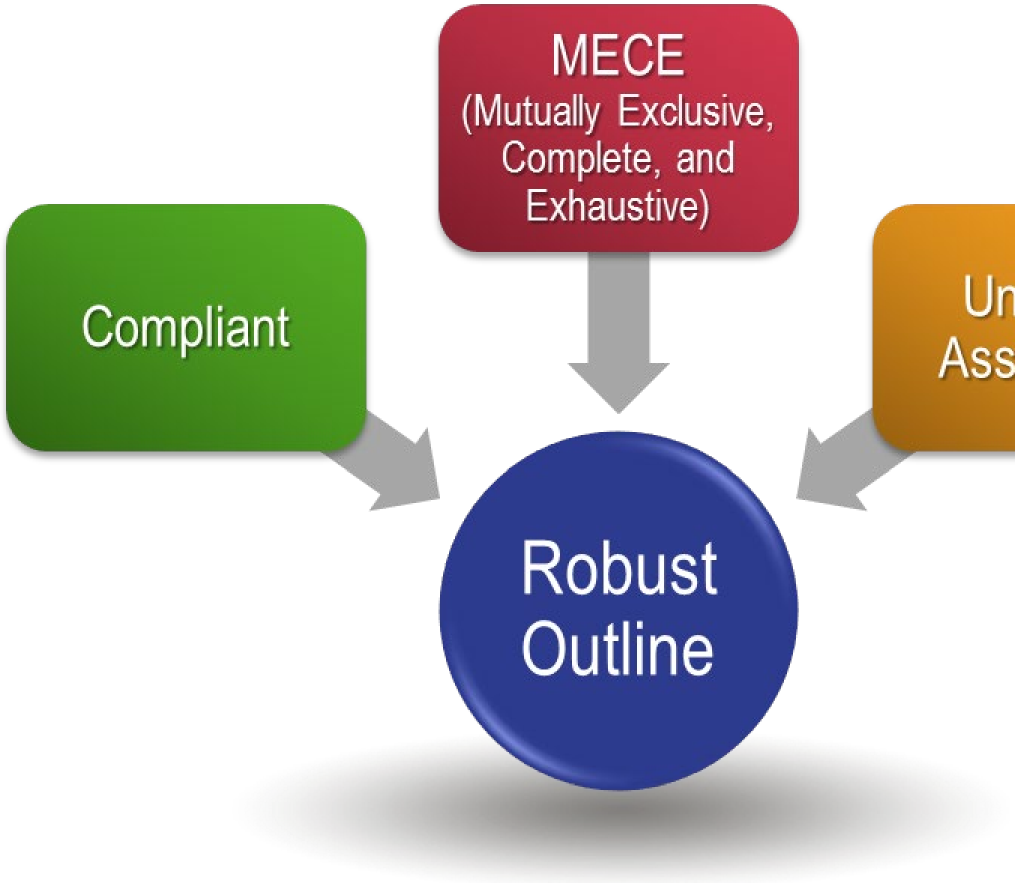


Figure 6. A Robust Outline. *The proposal outline can be robust only if it is compliant, MECE, and uniquely assignable.*

5. Annotate the outline to provide guidance to authors.

At this stage, the topical outline is still just a list of headings. Provide guidance to contributors by annotating the outline. Annotation can be added in-line to text or in a list. For tabular outlines, annotation can be added in new columns.

Annotation should include:

- Graphics to be used, including action captions
- Boilerplate to be used
- RFP requirements to be addressed
- Page and word count limits

- Themes and strategies for the section
- Customer terminology/style and usage to be used
- The answer to the question for each section—for all their planning, many writers fail to answer the question the customer asks
- Proof points to support claims

6. Develop detailed content plans for important sections

Apply the *just enough planning* principle. Too much planning unduly constrains the SME. Too little planning opens the door to non-compliance and poor quality.

The test of a good content plan is to ask, "Could I give this to the responsible author and expect him or her, using only what is in the plan and the kickoff briefing, to create compliant, responsive, focused content?"

If the answer is yes, you have done enough.

In many environments, an annotated outline satisfies the just enough planning principle and will provide an adequate basis for development. For some proposals or key proposal sections, it's often appropriate to develop the content plan in more detail.

In many environments, an annotated outline satisfies the "just enough" planning principle. For some proposals or key proposal sections, it's often appropriate to develop the content plan in more detail. There are many ways to plan detailed content, including section content plans and mock-ups.

Section content plans

Often referred to as storyboards or frames, section content plans provide additional specification for a document section. Section content plans are suited to a sequential development approach. Each step builds on what went before, so you need to know requirements in detail early in the process.

To create section content plans, use a template like the one in Figure 7. A template is essentially a list of headings stating what information or instructions are required. Adapt the template to cover the level of detail required for each proposal. Suitable headings to include in a section content plan template include:

- Customer and proposal name or reference
- Graphics to use
- Reference number and title of the section
- Boilerplate to use

- Section purpose
- Case studies and proofs to use
- Requirements to address
- Customer terms and language to use
- Win themes
- Page and word count limits
- Outline and headings for section content

Section Content Plan

Bid to Win
Bids, Proposals, Tenders

Proposal	Gulf Area Process Transformation	**Volume**	Management Volume
Section	3.0 Project Management	**Author**	A Murray

<u>BRIEF</u> SUMMARY of the Section – What's the purpose of this chapter/section
To demonstrate our ability to manage the project and specifically:

- Address the whole scope of the project
- Track and manage interdependencies in the process mapping
- Manage progress and provide visibility

<u>Requirements/ RFP</u> Sections covered.
Section 3 Project Management. (paras 3.0)
Requirements Checklist: Requirements 128 to 134

CUSTOMER ISSUES AND CONCERNS SPECIFIC TO THIS SECTION
Managing process interdependencies between departments
Securing sign-off by multiple stakeholders

WIN THEMES APPLICABLE TO THIS SECTION
Change in safe hands
Keeping progress visible

PROOFS, EVIDENCE, CASE STUDIES
Metropolis Change Programme
Capital Ambition project
Engage methodology endorsement (Aaron C Reskew)

MAIN BODY OUTLINE (Main headings, content notes)
3.0 Project Management
3.0.1 Comprehensive scope
Use PBS to show that we have covered everything
3.0.2 Managing Interdependencies
- Process Mapping
- Securing Signoff
3.0.3 Monitoring status
- Controlling progress
- Providing visibility

GRAPHICS / BOILERPLATE TO RE-USE
Benefits Map (Re-use and adapt the UAE project map)
Project top-level PBS (New) shows complete coverage of scope
Product Flow Diagram (New) tracks interdependencies
Capital Ambition Case Study

NB: Sketch any new graphics to be created on the reverse of this form

Figure 7. Sample Section Content Plan Template. *Using a template provides an aid to analysis and helps ensure that everything is covered. Templates should be adapted to each proposal's needs*.

Mock-ups

Mock-ups are a page-by-page visualization of the finished document laid out in its planned final form. They take a top-down approach in which each version is a progressively evolving prototype of the finished product. Mock-ups require interactive development, where the team and key users work together to refine each version.

In addition to the design implicit in a content plan, mock-ups contain layout information and page space constraints. If a hard copy proposal is required, mock-ups offer additional benefits to the printing process. They give the printer advance notice of what to expect, and for large proposals, they allow you to plan the number of folders and the printing timeline. They also help with planning for landscape enclosures and oversized attachments like project plans.

Mock-ups, shown in Figure 8, involve an extra level of design and provide greater visualization of the finished proposal. This requires extra initial effort, but that effort is spent on creating something that will evolve into the finished proposal.

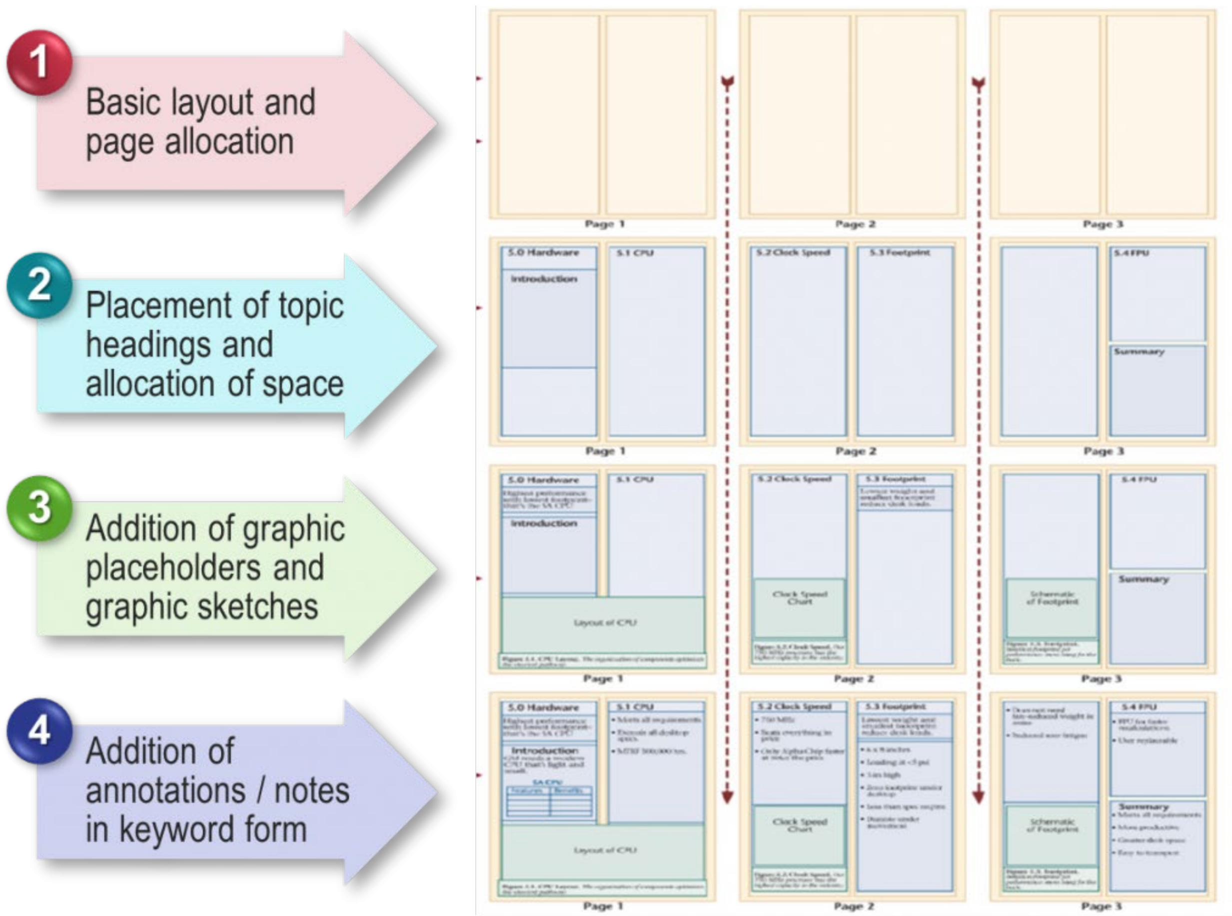


Figure 8. Using Mock-Ups. Mock-ups provide a visualization of the finished document. *Iterative development enables greater refinement as writing progresses. Mock-ups are typically used only for the most important sections or those that are expensive to produce.*

7. Involve your writing team in content plan creation.

If you are using section content plans, the Bid Manager or Proposal Manager, with the support of the proposal team, should develop initial section content plans before kickoff. Then, they distribute initial section content plans at the kickoff for further development by writers.

Proposal writers may be unfamiliar with the techniques of content planning. Direct them to any guidance available in your organization. Provide a sample completed plan as an example. Like outline annotations, sample content plans provide quality criteria for acceptance of all finished content.

The Bid Manager or Proposal Manager should agree to and sign off on content plans before writing starts. The completed section content plan will act as a contract between the Bid Manager/Proposal Manager and the writer that defines what is to be developed.

8. Review content plans before starting to write.

When time and budget allow, schedule a review of the completed section content plans before writing starts. The content plan review should include proposal contributors and writers, senior managers who have an interest in the proposal, members of the final document review team, and members of the core team. This step will help communicate strategy, align thinking, and enhance compliance. Use a combination of horizontal and vertical review.

Horizontal review examines the sequence of section content plans and the consistency and flow of the planned proposal at the top level. It asks:

- Is the sequence logical and easy to follow?
- Is it compliant with the customer's instructions?
- Does it tell a consistent story?

Vertical review is a deep dive into an individual section content plan. It asks:

- Does the plan meet the purpose for the section?
- Does it cover all the requirements for the section?
- Do the graphics support the story? Are they clear?

Together, horizontal and vertical approaches, shown in Figure 9, enable the team to test the consistency of the entire proposal.

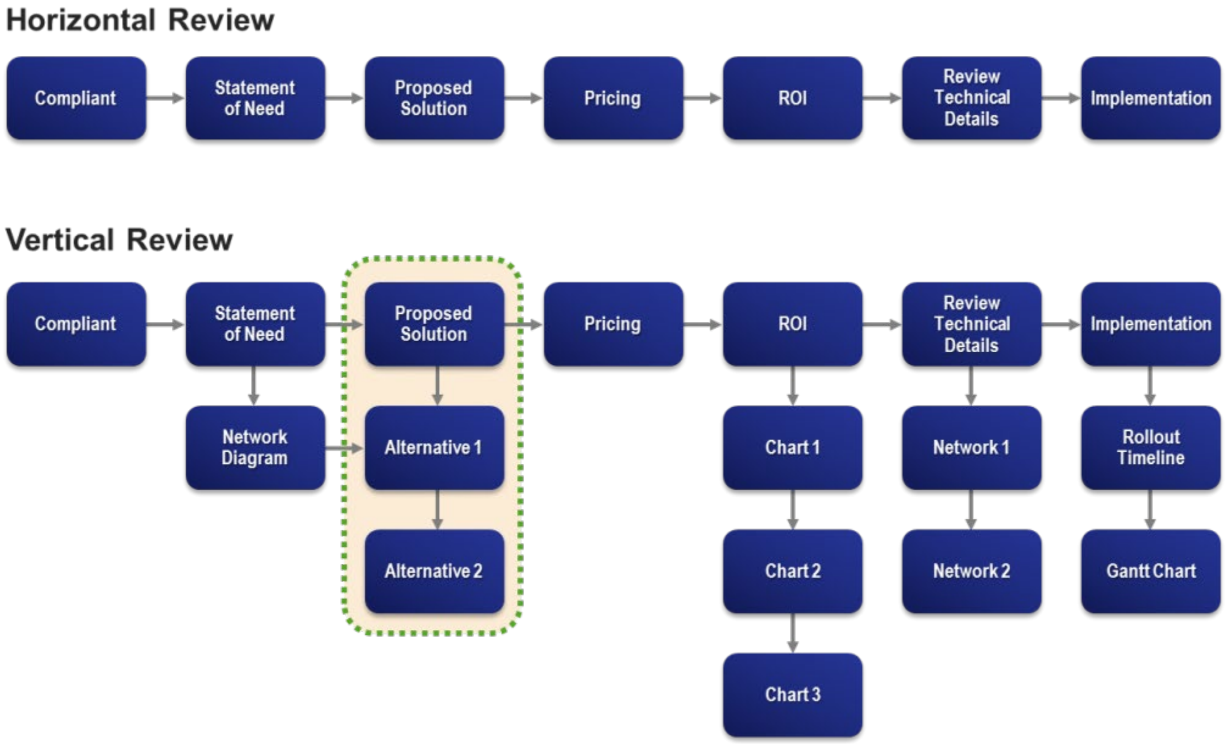


Figure 9. Review Approaches. *Horizontal reviews examine all content at the top level, whereas vertical reviews are a deep dive into section content plans.*

Consolidate review comments before ending the review meeting so that participants are clear what changes, if any, they should make to their plans.

The content plan review process may introduce departures from the strategies defined in the opportunity/capture plan. To resolve this, you'll need to change either the content plan or the strategies. Keep copies of early versions of content plans so that you can track changes and identify the sources of strategy departures.

9. Integrate content plans into the proposal development plan.

The outline is the basis for planning proposal development activities. Extend the outline to create a proposal responsibility matrix. For each uniquely assignable item in the outline, allocate a responsible developer. The responsibility should be unique so that there is one accountable person for each section. If you haven't done so already, provide training to SMEs in proposal writing and use a company-standard style guide to ensure consistency across all writers.

From the outline and page budget, decide how many pages and graphics each outline item requires. Identify how much of the content can be created by adapting reusable (boilerplate) content. Use historic metrics from your organization's previous pursuits to estimate the time and effort required.

The following development metrics were collected as part of the APMP 2002 Benchmarking Survey and are averages drawn from a wide range of industries and organizations:

- Simple graphic: 1–2 hours
- Complex graphic: 2–6 hours
- New material: Four pages per day
- Adapting boilerplate: 20–40 pages per day

Add due dates for each outline item and schedule any planned reviews. Incorporate the resulting proposal responsibility matrix and schedule into the proposal management plan.

10. Create content with evaluators in mind.

When it's time to create the content, remember that proposal evaluators may be "skimming" your proposal rather reading it word for word as they search for the answers they need. For this reason, your proposals should be well organized, making information easy to locate.

A well-organized proposal can lead to higher evaluation scores and improved customer confidence in your ability to deliver. A well-organized proposal is also easier to write.

Proposals that are well organized and easy to understand have the following attributes:

- They provide a roadmap of how the proposal is organized
- They make key points easy for evaluators to identify and understand
- They are written from the customer's point of view
- They tell customers what is important to them
- They use multiple highlighting techniques (tables of contents, headings, graphics) so evaluators can scan the document and locate the information they need

Organize your bid or proposal according to the customer's instructions

Prepare a top-level, topical outline that follows the customer's instructions. If the customer does not provide explicit instructions, follow the outline of the request. Either way, use the exact headings from the bid request, and include all sections that the customer requires. Mimic the numbering system, naming conventions, and order listed in the bid request. If your colleagues want to digress from the client's instructions or format, remind them that doing so may lower your score.

Make information easy for evaluators to find

The introduction to the proposal and all subsequent sections should provide a roadmap for what follows. Plan summaries at all levels of the proposal to reinforce key information.

The executive summary is particularly important. Use the executive summary to connect with the customer, demonstrate an understanding of their key issues, provide a solution for each key issue, and summarize. The executive summary should remain brief and high level so decision makers can review the highlights of your proposal. Write the executive summary first—this way, it provides a clear guide to the proposal writers and other contributors.

Use headings and subheadings to direct evaluators to information

Headings and subheadings clearly mark when you are moving to the next key point. Use headings and subheadings to organize and announce content. Be sure headings and subheadings at the same level are parallel in format.

Generally, headings organize content into major sections but do not provide specific descriptions. A subheading is usually a short, informative phrase that is more specific. A heading could be "Software"; subheadings could be "Software We Use Regularly" and "How This Software Will Benefit Your Company."

Use a structure that layers information for the reader

Some solicitations may require that you structure information in a particular way. Others may allow you to use the structure you think is best. When you choose the structure, be sure to organize your information in layers—moving from general to specific, and then summarizing.

Begin by introducing a topic (e.g., your solution) and explaining it at a high level. Gradually add to your explanation with supporting facts and claims (these could be the features and benefits of your solution). Ask yourself the "so what?" question to see how your features offer relevant benefits. Next, give proof for your claims with examples, case studies, and other details (e.g., past performance). Address any potential drawbacks so that no questions are left unanswered. Finally, write a conclusion that summarizes your main points and reinforces your position.

Put the most important points first

Whether you are writing a proposal section, a paragraph, or a simple bulleted list, put your most important points first. This helps busy proposal reviewers, who want to get to the heart of your solution as quickly as they can. The faster you can give them a compliant response, the faster they can score the question and move on.

Additionally, make key messages pop by using bold text, callout boxes, and graphics. See Persuasive Writing for additional information on structure.

Group similar ideas and avoid redundancy

Often, a bid request will scatter similar questions throughout multiple volumes of an RFP. This creates confusion for both proposal developers and reviewers. Multiple authors may unknowingly answer the same question two different ways, and customers may be left with an unclear understanding of your solution.

To limit confusion, read the RFP before writing and use your content plan to help writers identify and group similar ideas. If the RFP does not require a particular structure, group similar ideas together and eliminate redundancies. If the RFP's instructions don't allow you to do that, use the following guidelines:

- If the same question is asked in two different volumes or sections, repeat the answer, checking if there's any different context that should be added based on the volume or section. Tell reviewers that it's repeated so they know the repetition wasn't an error. Cross-check to ensure the answer has a consistent message.
- If the same question is asked more than once in the same volume or section, then answer the question fully in the first instance. In later instances, summarize your answer and direct the reader to the full answer's location.
- Consider using a compliance matrix, which can help the client identify where in the document you've answered each question.

11. Use content plans to monitor quality and progress.

Extend the proposal responsibility matrix to show additional details, such as planned finish, current status, and planned review dates. Use the resulting product status register to monitor progress and status, as shown in Figure 10 (you can also use a stoplight chart).

Use the quality criteria defined in the annotated outline or section content plans as the basis for quality activities and reviews.

Ref	Title	Assigned to	Due Date	Status / Forecast	Rev Stat
3.0	Project Management	A Murray	Jun 6	Jun 6	N/A
3.1	Project Change Management	N Taylor	Jun 6	Jun 6	N/A
3.2	Project Organization	M Ward	Jun 6	Finished	Gre
3.3	Project Issue and Risk Management	B Abbott	Jun 9	Jun 8	N/A
3.4	Project Communications Management	J Stapleton	Jun 3	Finished	Gre
3.5	Project Quality Management	B Woodle	Jun 6	Finished	An

Figure 10. Tracking Progress. The outline forms the basis for the proposal responsibility matrix. *Adding date and status fields creates a product status register for the deliverables from your writing team. Use the product status register to monitor progress*.

To monitor quality and give structure to reviews, use the quality criteria defined in the annotated outline or section content plans.

Application in Diverse Environments

Additional guidelines in U.S. federal acquisitions

U.S. federal bid requests issued under the Federal Acquisition Regulation (FAR) Part 15 must comply with detailed instructions on how the bid request and bid response should be structured. Requirements for the structure and presentation of the proposal are contained in Section L of the bid request. Evaluation factors for the award are provided in Section M of the bid request.

Requests not subject to FAR Part 15 will not be so prescriptive, but will still usually provide some level of instruction on required proposal structure and evaluation criteria.

Standardization among other formal procurements

Non-U.S. procurements, including public sector and large commercial organizations that frequently make large purchases, also follow a rules-driven process. All buyers share the objective of making the evaluation process easier. Standardizing responses contributes to this goal.

Bid requests issued as part of a formal, rules-driven purchasing process will normally provide advice and guidance on the required structure of the offer. Some are industry-specific. For example, PAS 75 provides detailed lists of headings for prequalification questions for construction industry bidders in the United Kingdom and Europe.

Rules are not standardized or prescriptive across legislatures, but there is a generalized expectation that procurement will be transparent and fair. Accordingly, some type of bidder instructions are usually provided. Some UK government tenders now offer detailed guidance that makes forming a content plan easy but meeting page counts difficult.

Constraints presented by electronic submissions

Electronic submission portals, particularly those where evaluation is supported by automated tools, frequently impose rigid structures on proposal content. When content is limited to text answers pasted into a questionnaire tool, your focus during content planning must be on compliance and responsiveness in the text.

Sales enablement solutions and content libraries

Many small proposals are created using automated document creation tools. Such automation reduces the turnaround time on proposals, reduces effort, and can improve quality and consistency. However, it risks creating standardized proposals that have as much customer focus as a generic brochure. You also risk missing specific request requirements.

Sales enablement tools and supporting reuse libraries should be carefully selected so that they have sufficient design and customization features to adapt to each bid request. Users should be given training and support in the principles of content design so that they can use the tools' features to create compliant, responsive proposals. If you decide to use such a tool, edit carefully and use search techniques to ensure all references to previous customers are removed.

Recent Trends

Collaborative review solutions

Online tools to support collaborative development and review typically integrate with popular office software suites. These use the outline view of documents to allocate responsibility and manage access to the shared document.

Collaborative approaches to document design using these types of tools are likely to lean on annotated outlining as a design approach, rather than external aids such section content plans.

Proposal management software

Many proposal management software solutions include RFP analysis tools. These can be used to generate both the requirements checklist and to develop the outline of the proposal.

While most RFP analysis tools are very domain specific and cope better with standardized requests, such as complying with FAR Section 15 rules, their sophistication and adaptability to other domains will likely continue to improve.

Structured writing approaches

Bidders who regularly create standard sections for proposals frequently find that the same considerations arise repeatedly in designing content. One way to speed the design approach is to embed the advice to writers that is normally captured in annotations in a structured writing outline.

The Proposal Manager or Knowledge Manager defines what is to be prepared in the outline, identifies the specific content to be created, and adapts the writing outline as necessary. Writers work through the instructions following the outline provided, using the embedded guidance to create custom content.

Common Pitfalls and Misconceptions

Not enough planning

Content planning happens when the Bid or Proposal Manager is under the most time pressure. The temptation is to dedicate less time to planning and review before the kickoff. The penalty for this, however, is poor-quality content and increased rework later in the proposal cycle.

A distinctly bad practice is to distribute the top-level outline to contributors with instructions to refer to the RFP and add any other requirements they may identify. This will lead to orphan requirements and duplications. An online collaboration tool or file sharing system can help contributors view and comment on each other's work in real time. In addition, shredding an RFP and assigning responsibility for requirements early on can help teams cover their bases.

Introducing new techniques without training and support

Using any detailed planning technique requires support and adoption by those who have to use it. SMEs will react badly to any unfamiliar approach if the benefits to them are not clear. Writing proposals is not most people's day job. Giving team members additional tasks without demonstrating their benefits may lead them to reject new tools.

Summary

- Compliant, responsive, focused proposals do not happen by accident. Proposal content must be specified before it is created, and a wide range of techniques is available to support the specification process.
- Bid Managers and Proposal Managers should use techniques appropriate to their proposal environments. At a minimum, you should create a robust topical

outline as a basis for checking compliance and planning writing tasks. Use more detailed approaches when the opportunity is complex or more important.
- Focus on complying with customer instructions and achieving a clear brief for proposal contributors so that they don't miss or duplicate requirements. Set clear writing criteria for authors so they can create winning, customer-ready content.

Terms to Know

- Annotated Outline
- Content Plan
- Kickoff Meeting
- Mock-Up
- Proposal Outline
- Win Themes

Tools and Templates

- Content-Plan-Template.docx

Customer-Focused Proposal Writing

Introduction

By engaging the reader on their issues, goals, and how they will achieve success by working with you, the proposal writer demonstrates active listening – a key attribute to winning work. This section goes over simple techniques to write a persuasive, customer-focused proposal.

Best practices

There are 6 techniques here to help proposal writers focus on being customer focused.

1. Start with the customer

Where possible, start your paragraphs with your customer's name, "you," or "your." This simple technique helps instill customer focus throughout your proposal. Weave in how you will help them resolve their problems only after demonstrating that you understand the pain points they are experiencing.

For example:

We understand your challenge is balancing value for money, investment affordability, and solution deliverability.

Switch around the order to make it start with the customer…

Your challenge is balancing value for money, investment affordability, and solution deliverability.

2. Talk about them, not you.

No one enjoys a conversation that's all one way. You can't get a word in edgeways, and it's all about them. We don't want our proposals to do the same, so unsurprisingly, in customer-focused writing, we refer to the customer more times than your organization. It's crucial to situate ourselves as helpers – not as the stars of the show. Start with this principle in mind, but then check back at the content you've just created and test whether you are referencing them more than you. If you're not, edit your content.

For example:

Our dedicated in-house team are experienced experts at estimating and benchmarking across the lifecycle of a project. We have an unrivaled suite of models that we use to estimate and benchmark solutions.

Change to:

You will benefit from our dedicated, in-house estimating and benchmarking experts. Your project lifecycle will be checked using our unrivaled suite of models.

3. Show empathy and understanding

Show empathy and understanding of the project and needs to build trust – you need to read the customer documents/background, get a download from your sales lead/people with a relationship with the customer, research the customer yourself, and put yourself in their shoes. Ensure that everything you say is filtered for your audience. If you are unsure of how to show empathy, ask yourself:

- Why has this question been asked?
- What are the real underlying issues and concerns?
- Which stakeholder will be particularly interested in this question?
- How important is this question to them?
- What are the client's long-term business goals? How will working with you help them achieve these goals?

That should help spark some ideas to help make it personal and show empathy. When in doubt, pay close attention to the verbs that you use in the proposal. Verbs like "support," "help," "achieve," and "accomplish" demonstrate empathy, as well as spark interest. Be as specific as you can in your language. Your aim is to demonstrate that you thoroughly understand their problem and then build on that to show you have the best solution.

4. Tailor any re-used or boilerplate content

Tailored, not boilerplate: top & tail, get specific (references to the project name, people names, site names, etc.) – mirror their language. If your re-used content says program management and they are asking for project management, regardless if they are slightly wrong with the technical phrasing, copy their language. Additionally, look for ways to incorporate anecdotes into the proposal; for example, include an example of a time you helped another client solve similar problems; or, if you are writing a retention/renewal/re-proposal, remind the client of problems you have helped them through. Tailoring the proposal clearly shows that you care about more than just winning the work – you care about the client and helping them solve their problems.

5. Ask yourself the "So What?" question

To keep the readers engaged, each of your answers needs to be clear on the benefits to the customer...ask "so what does it mean to the customer?" Clearly state the benefit; don't leave it to them to work it out. The more tangible the benefit is, the more impactful and memorable it will be for the customer. If it makes sense in the document, consider bolding, highlighting, or creating call-out boxes for the benefits. This, once again, puts the focus back on the customer and what they will gain through working with you.

6. Review and edit with customer focus in mind

Step back after writing your content and perform a self-review. Ask yourself: If you were the reader have we answered the question, have we made it all about them, and have we addressed underlying issues and concerns? Could we personalize it more?

Writing to the evaluation criteria

While it's important to be compliant with the RFP, be sure to demonstrate that your proposal is not merely an exercise in answering questions. Treat the evaluation criteria as a standardized test you need to pass; treat the proposal as the college essay that will make you stand out above the rest.

Application in Diverse Environments

Be mindful of the tone of your proposal. Different readers will be looking for a specific tone that resonates with them, and that tone can vary widely among individuals. While customer focus should always be the organizing principle of your proposal, be aware that you will need to hit a tone in each proposal that speaks to diverse audiences.

Recent Trends

There is evidence in some jurisdictions of buyers asking for more details from bidders earlier in their procurement processes. This is leading to more customer-centric and specific requests at the RFP stage. They may ask for solutions to specific problems or how you'd handle a certain situation. Very specific scenario-based requests that force bidders to produce content that is all about what you'll do for that customer is not customer-focused. This trend may be a result of bidders not producing customer-focused proposals in the past.

Common pitfalls and misconceptions

Less experienced proposal teams tend to write proposals that are focused on their own capabilities rather than tailoring their content to their customer. Often by the time the customer issues their RFP, they already have a good idea of your capabilities. So repeating your capabilities again won't be telling them anything new. Creating a proposal that is more customer-centric changes the perspective of your proposal and makes it much more relevant and powerful for the reader.

Summary

- Keeping the customer at the center of the narrative demonstrates empathy and understanding – two underrated qualities that can make a difference in winning work.
- Using simple writing techniques to keep the focus on the customer while still distinguishing what your company brings to their journey are effective ways to maintain the focus on the customer throughout the proposal.

Terms to know

- Persuasive Writing
- Writing Clearly
- Tone
- Narrative

Developing and Delivering Effective Presentations

The most effective presentations impact and influence their audience. Every aspect of the presentation, like the presentation medium, should therefore be audience focused. Most people create presentations to help themselves as presenters, not the audience. For instance, when preparing presentations, most presenters think:

- I want a security blanket, so I'll use slides as speaker prompts, not audience aids.
- I don't have much time, so I'll see what slides I've got and base my content on them.
- I don't have time to practice, so I'll put extra words on the slides to remind me what to say.

Or, when tasked with creating a presentation, presenters may open PowerPoint and think, "I'll start by writing headlines, then bullets, group common topics in boxes, add a bit of shading, a bit of clip art …" This approach rarely works, and it means that:

- PowerPoint or visual aid media becomes the way the presenter thinks rather than a tool to convey thinking
- The audience (and what the presenter wants them to do after the presentation) is ignored.

Since nearly everyone prepares presentations this way, nearly every PowerPoint looks the same—a cover slide; table of contents; table of contents with the first topic highlighted; text-heavy, complicated slides, table of contents with the second topic highlighted; and so on.

But this is a mistake. In fact, the best way to use visual aid media is the opposite of the common practices listed above:

- Start by thinking about what you want to happen *after* the presentation, not what your content should be—and let this govern your entire presentation.
- Think about what's best for the audience, not what's easiest for you to talk about.
- Go to PowerPoint or other visual aid media last, not first. In other words, create your content and transfer the relevant elements to your media.

> The presenter's role is to communicate with the audience and control the presentation, including audience interaction.

As mentioned in the section on orals, note that presenters may need support from proposal writers to develop scripts that support the visual aids used in their presentations. It is important that writers performing this role understand the best practices described here.

Best Practices

1. Think about your audience first

Before preparing material for a presentation, consider and understand your audience so you can tailor your content to what will best interest those listening. The audience will receive your message, filtered through and affected by their own experience, knowledge, and personal values.

Your audience's reaction, and therefore the success of your presentation, will largely depend on whether you effectively communicated your message and whether it met their expectations. As a presenter, you don't control the audience's expectations. What you can do is find out what they have been told about you or your organization and what they are expecting or want to hear.

2. Use a customer-focused structure to develop presentations

Follow a logical presentation structure to ensure that your audience retains as much of the information as possible. People find it difficult to maintain concentration for long periods of time, so any presentation to any audience should be succinct, well-structured, and interesting.

Before you begin developing your presentation, ask yourself the following questions:

- What is the purpose of the presentation?
- What is my objective?
- What outcomes or next steps do I want to achieve, and what outcomes or next steps do the customers or senior managers expect?

Regardless of whether your presentation will be delivered formally or informally, you should always aim to give a clear, well-structured delivery. That is, you should know exactly what you want to say and the order in which to say it that will be of most interest to the audience. There are a number of recognized structured methods to organize presentation content:

Harnessing the power of three

In public speaking and rhetorical debate, as well as in much communication, three is the magic number. The human brain finds it relatively easy to grasp three points at a time; people find three points, ideas, or numbers easy to understand and remember. You could therefore structure your presentation around the number three.

For example, your presentation could have three main elements: the introduction, middle, and conclusion. Within the main body of your presentation, divide your key message into three elements and then expand each of these points into three subpoints. If you are using a visual aid, limit the number of bullet points to three, and expand on each of these as you go along.

What, why, and how?

You could structure your presentation by addressing the questions “What?”, “Why?” and “How?”

“*What*?” identifies the key message you wish to communicate from the audience perspective. What will they gain, what can they do with the information, and what will the benefit be?

“*Why*?” addresses the next obvious question that arises in the audience. Having been told “what,” the audience will naturally start to think, “Why should I do that?” “Why should I think that?” or “Why should that be the case?” Directly addressing the “Why?” in the next stage of your presentation means that you are answering these questions and your presentation is following what the audience perceives to be a natural route through the material.

“*How*?” is the next question that naturally arises in the audience’s mind. How are they going to achieve what you have just suggested? Try not to be too prescriptive here; instead of telling people exactly how they should act on your message, offer suggestions. You should also finish by proving what you have just said by providing evidence that your argument is beyond dispute.

Tell them what you are going to tell them, tell them, and tell them what you’ve told them

Compelling message (beginning). State why the subject is important to the audience and the key elements of the subject.

Main content (middle). Arrange the key elements in a logical order and one that places the most important items for the audience first. Then expand on each point, providing supporting material—discussion, argument, analysis, and appeal. If you are hoping to persuade people, you should address potential objections within the presentation so that you present a reasoned, well-balanced view.

Conclusion (end). Tell the audience what you have just told them (by summarizing the key points, concluding with the main subject again). The conclusion should repeat the main points, but try to use different words and summarize the main point and argument. End decisively so no one is in any doubt that your presentation is finished. This is also the time to ask the audience whether they have any questions, if you have not taken them during the presentation.

Delete

Tip

Current best practice is not to finish the presentation at the questions stage. Rather, you should present your audience with a topic for discussion—for example, “Would you like me to provide further details on any of the topics presented today, or have you got enough information?”

3. PowerPoint and visual aids are for visual media—use them for visuals, not words

Your slides should accompany, not duplicate you. They must not tell the whole story, or there's no point in you being there. Consider if your audience were to see your slides before your presentation; would they know what you were going to say just by reading them? If so, you have too much information on them. Only put simple, digestible keywords and relevant visuals on your slides, and then it's up to you to elaborate on them.

Audiences will equate the quality of your slides and visuals with the quality of you and your message. It's incongruous to talk about your "best-practice methodology" when presenting alongside worst-practice, poorly designed, text-heavy, unclear slides. If you don't have the right level of visual media design skills, delegate slide creation to someone who does.

More than 80 percent of people prefer to receive information visually. A picture really can paint a thousand words. PowerPoint and visual aids are excellent tools for communicating visual messages such as graphics, charts, flow diagrams, graphs, and images. However, they are not good ways to communicate full sentences and reasoned arguments. You, the presenter, are better at doing that.

So, either create visual, text-light presentations or wordy, text-heavy documents. Don't create something that is both and, thus, neither. Consider using images as an alternative, to make the most impact.

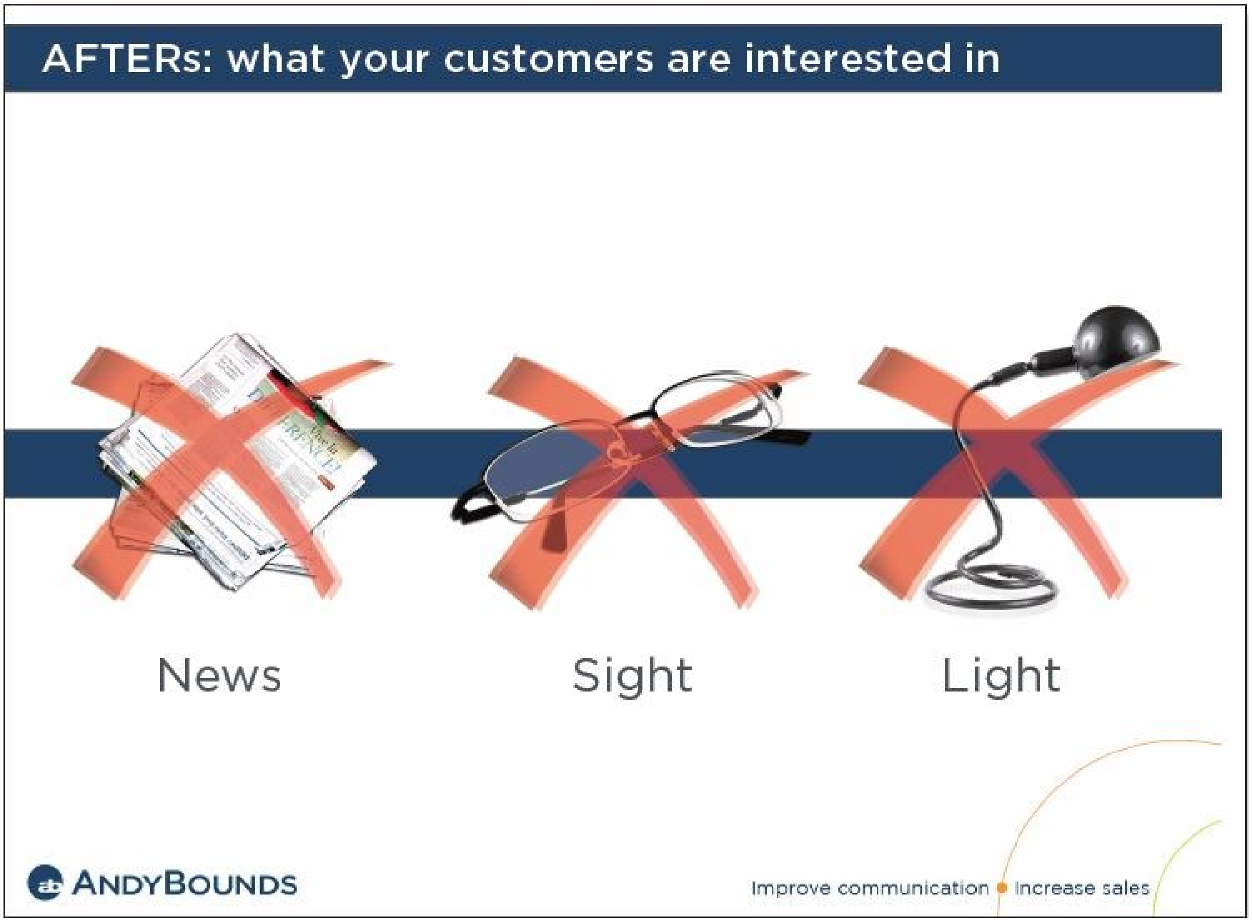


Figure 1. Identifying Common Presentation Mistakes. *The vast majority of presentations contain slides riddled with full sentences and bullet points because they are the easiest to create. Audiences find bullet points uninspiring and—after seeing the 10th presentation in a row—dull. So, avoid using bullet points*.

4. Be as rigorous with slide headings as you are with proposal headings

You would never submit a proposal with the headings "About us," "Our process," or "Summary," and nor should you with slides. Best-practice slide titles are interesting, clear, and—where appropriate—benefits-rich. For example, replace "About us" with "Why we are uniquely placed to help you" and replace "Summary" with "The three areas where we will bring the most value."

Use animation appropriately. If your visual media shows six points, your audience will read ahead. You know this is true—just think about what you do when you're in the audience. This means that while you're discussing point 1, the audience is reading points 2 through 6, and they won't be fully focused on any of them. So animate your slides and click to bring up each new point. Avoid having points flying in from the left or right, as many audiences will find this distracting. Make the point just appear.

5. Review and rehearse presentation content

Remember to have your presentation and any additional materials reviewed in good time. Your reviewers can follow this simple checklist:

- Ensure that the language used is appropriate for the audience
- Ensure that words used are accessible and easily understood (such as those used in a conversation) rather than technical or obscure words—particularly important if the presentation has an audience with diverse native languages
- Ensure that short, succinct bullets are used rather than long sentences; sentences invite the audience to read rather than listen
- Ensure that metaphors are used to aid understanding and retention
- Identify ways of raising the audience's attention, and suggest additional visual materials that could be included to illustrate key points
- Ensure that slides, illustrations, titles, captions, and handouts are free from spelling mistakes

6. Know when and how the presentation will be delivered

Presentations are usually delivered directly to an audience. However, there may be occasions where they are delivered from a distance over the Internet using video conferencing systems, such as Teams. In choosing your presentation method, you have to consider several key aspects. These include:

- The facilities available to you
- The occasion
- The audience, both in terms of size and familiarity with you and the topic
- Your experience in giving presentations
- Your familiarity with the topic

Presentation methods range from very formal to very informal.

	VERY FORMAL	FORMAL	INFORMAL	VERY INFORMAL
SUITABLE OCCASION	Large conference	Smaller conference or group where	Smallish group, probably internal, but not	Small team meeting where you know the

		you don't know the audience	all are known to you	other participants
PURPOSE	Provide information to a large number of people	Provide information, but also get a reaction	Provide information, hear reaction, respond; possibly discuss	Provide information or generate discussion
STAND OR SIT?	Stand	Stand	Stand or sit	Probably sit
PRESENT FROM WHERE?	A lectern	The front of the room	Either within the group or from the front	Your place at a table, or within the group
VISUAL AIDS	Slides controlled from the lectern; can also use video or other multimedia	Fairly simple slides	Some visual aids, but kept to a minimum	Perhaps a one-page summary of key points
SOUND SYSTEM OR MICROPHONE?	Yes	Yes	Probably not	No
TYPE OF ROOM	Large conference hall	Large conference meeting room	Meeting room or office	Meeting room or office
PROVIDED IN ADVANCE	Copy of slides	Copy of slides	Handout	Nothing expected
AUDIENCE INTERACTION	Formal question session typically following the presentation	Formal questions, but may get interruptions during the presentation	Fairly interactive; presenter handles questions or discussion during the session	Likely to be very interactive

Figure 2. Choosing a Presentation Method According to the Occasion and Its Formality. *Very formal occasions tend to go with a larger audience, whose members you do not*

know well. Your role is likely to be more providing information and less discussing the information.

7. Use presentation notes

You also have a choice how you manage your text, in terms of notes. Whether you're confident enough to speak with very brief notes or you need full text, consider how you record your notes to remind you what you're going to say. There are various ways you might choose to manage your text; the following table shows the most well-known methods and their advantages and disadvantages.

METHOD	HOW TO USE	ADVANTAGES	DISADVANTAGES
Full-text script	Read	Unlikely to forget anything	• Less attention on the audience • Sounds stilted • Harder to change what is said dynamically
Notes pages from a slide package	• Detailed reminders in relation to every slide • At the end of each point, write a link statement to lead you into the next one	Words tailored to slides	• Cannot highlight sections or play with the font size easily • Difficulty quickly and visually identifying the most important points • Will have a sheaf of papers, which can be hard to handle
Cue cards	• Write main points on separate index cards with	Speaking directly to the audience, which increases your rapport	• Small index cards are more professional than large

	concise supporting material written underneath • Ensure familiarity with the main points and the links between one idea and the next to become less reliant on the cards		sheets of paper, which may prove difficult to handle • Have to write by hand
Keywords on cards	Simplify the information using keywords that prompt key points	Using keywords increases spontaneity and rapport with the audience	Easy to lose your place if sidetracked
Mind maps	Develop diagrams to represent words, ideas, tasks, or other items linked to and arranged around a central key word or idea	• Similar to using keywords on cue cards, but easier to illustrate complex relationships than with keywords • Helpful for interacting with audience	Difficult to keep track of progress
Whiteboards and interactive whiteboards	• Record interaction with and comments from the audience during brainstorming sessions • Know how an interactive whiteboard	Good for developing an explanation, diagrams, and simple headings	• Takes time • Back is turned from the audience when writing • Handwriting has to be legible, aligned horizontally, and large enough to be

	works, and practice using it.		seen by all of the audience • Interactive whiteboard technology may be problematic
Flip charts	Collect ideas and responses from the audience and create spontaneous summaries	• Popular, low-cost, low-tech solution to recording interactive meetings and brainstorming sessions • Can be prepared in advance and is portable • Requires no power source and no technical expertise	If the audience is large, a flip chart will be too small to be seen by everyone

Figure 3. Choosing Between Options for Presentation Notes. *Handouts summarizing or including the presentation's main points are an excellent addition but must be relevant. You may also consider emailing copies of handouts to participants after the event. If your talk includes questions or discussion, summarize this and communicate it back to the attendees.*

8. Create rapport with the audience

If the presentation is a formal or semiformal customer event, begin with introductions. Take your time to get into position, make eye contact with the audience, and remember to smile. When introduced, always acknowledge the introduction with thanks. Unless it is a very small group or informal occasion, always stand to give a presentation or talk. Remember to keep your head up and maintain eye contact with the audience throughout. Be alert to the audience's mood and reaction.

Maintaining interest throughout depends not only on the content but on your vocal delivery as well. Remember that the following aspects of voice control are important:

- Volume — to be heard
- Clarity — to be understood
- Variety — to add interest

Don't speak too fast, and remember to pause occasionally to let the audience assimilate the information. Use easily comprehensible language and avoid clichés and jargon. If you are sincere and enthusiastic, you will quickly develop a rapport with the audience.

9. Know how to deal with questions

Dealing with questions in a presentation is a skill that anyone can master. As a general rule, if people ask you questions—even hostile ones—it's not to trip you up but because they genuinely want the answer. Most people dread the question session because they fear losing control. A little thought and some early planning can avoid this risk. Any presentation is an information exchange—it's as much for you to hear what people want to know as it is for them to hear from you. However, if your presentation starts to get diverted, try saying something like:

"I think we're getting a bit off topic here. Let's put that to one side, and you and I can chat about it later. Come and find me at the end, and we'll exchange contact details."

You could even say:

"I'd really like to get on with the presentation, otherwise I may not have time to finish. But let's talk about this later."

At the start of your presentation, you should make it clear whether and when you would prefer to deal with questions—as you go along or at the end of the presentation.

Some presenters prefer for audience members to ask questions as they arise during the presentation. The advantage of this approach is that you can deal with any misunderstandings immediately. However, there is also a danger that the question will disrupt or distract the presentation, or that questions will be raised that would have been covered later.

Other presenters prefer to deal with questions at the end of the presentation. If you prefer this approach, ensure that you set aside sufficient time for questions, but limit the amount of time available. The amount of time will depend on the type of presentation you are giving, but typically 10 minutes is sufficient. The advantage of this approach is that if you talk too quickly, you will simply have a longer question session.

When you have finished answering questions, make sure that you have the last word with a strong assertion of your main message. In other words, thank the audience for their questions and summarize again the main points of your presentation.

The main rule of question sessions is to treat your audience with the respect you would like to have shown to you, and answer their questions directly and honestly.

- If they have asked a question, it is because they want to know the answer.
- It is very unlikely that anyone will ask a question solely to trip you up, although this does happen.
- If a question is provocative, answer it directly. Never be rude or show you are upset. Do not compromise yourself but maintain your point of view and never lose your temper.

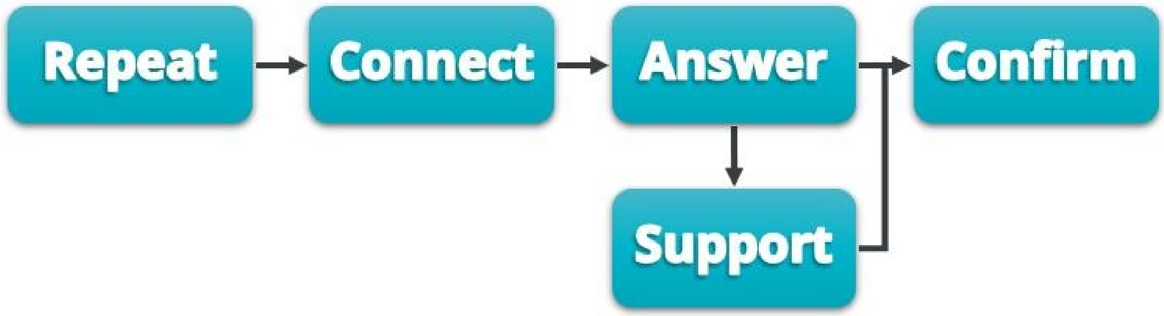


Figure 4. Answering Audience Questions. *Listen carefully to the question and, if the audience is large, repeat it to ensure everyone in the audience has heard. If you're not sure you understood correctly, paraphrase it back to the questioner and check that you have it right. Answer briefly, and to the point.*

If you do not know the answer, simply say so and offer to find out. Then ensure that you follow up. To be able to respond, you will need the questioner's name and email address, so make sure that you speak to them before they or you leave.

"I don't know" is an acceptable answer to some difficult questions, and it is much more acceptable than stumbling through an answer or making something up. "I don't know, but I'll find out and let you know" is even better.

Relax and don't feel as if you have to know everything. If you don't know, it's better to be honest than to try to pretend. Trust takes a long time to build up, but it can be lost in just a moment, and audiences will almost always know when you are not being genuine.

Application in Diverse Environments

Geography, industry, and market should drive presentation media

The presentation media chosen should be appropriate for the audience, whether senior stakeholders or customers, and for the geography, industry, and market. These are all important considerations and should inform which presentation media is appropriate to use. For example, it may be appropriate for a manufacturing organization to create a 3D model for a customer presentation, rather than a set of Microsoft PowerPoint slides, to prompt discussion and feedback.

Teaming partners should build and rehearse presentations together

When teaming partners are preparing for a customer presentation, they must rehearse together before meeting with the customer. The aim is to present the most cohesive presentation possible in front of the customer. Therefore, presentation media development should be carried out collaboratively, not separately, and include using the same:

- Templates
- Development guidelines
- Colors and styles
- Messaging

The Opportunity/Capture Manager or the Bid Manager should also schedule time for the team to collectively consider questions the customer might have, along with the answers. It is also a good idea to consider the difficult questions that the customer might ask and how to deal with those questions. Rehearsing will familiarize each individual in the team with how to hand off the presentation to the next presenter and which questions they will be expected to answer during the customer presentation.

Common Pitfalls and Misconceptions

Any member of the team can present

Some people are natural presenters, and others will be uncomfortable. It's important to know the strengths of the team and prepare each individual for their part in any presentation. All team members should have a thorough understanding of how they will be introduced, the slides they will be responsible for presenting, the key messages of the slides and the amount of detail required, and how they should hand off to the next team member to present. During the question session, everyone should know and have rehearsed the answers to customers' expected questions, including difficult questions.

Presentations can be developed the night before and delivered without preparation

This approach generally will deliver a presentation that is focused on the organization, its history, and the features of the solution—"It's all about us"—rather than what is of most interest to the customer.

You should close the presentation with the question-and-answer session

When you have finished answering questions, make sure that you have the last word. Thank the audience for their questions, then summarize again the main points (key selling messages) that your presentation was designed to communicate and your understanding of the next steps.

Summary

Presentations need to be considered in relation to the audience and the key messages that need to be conveyed. Content should meet the audience expectations first, rather than be driven by what the presenter is comfortable saying. Preparation and rehearsal are key to a successful presentation, whether it's an internal pitch or to a customer. Always find out how long you have to present, and check if this includes time for questions.

Executive Summaries

Investing in an impressive executive summary is worth it. This proposal section lets you communicate with the customer in a concentrated, especially persuasive way. When you write a compelling executive summary, you make it easier for evaluators to digest the key messages in your proposal. And improve your chances of winning.

While the section's name implies that senior leaders read it, it's usually read by the customer's whole evaluation team. Management reads it only very rarely. Still, this is the most important, and most read part of your proposal document.

To write a strong executive summary, your opportunity/capture or sales teams needs to provide input early. Because the executive summary clearly articulates your main proposal strategy themes for meeting the customer's needs, it's an excellent tool for providing guidance to the proposal team. It can provide a roadmap for the rest of the opportunity/capture plan. As your solution evolves and matures, you can gradually develop and improve the executive summary throughout the proposal process.

Executive summaries should be the first section (or a separate document) of any proposal longer than ten pages (if not prohibited by customer instructions). Adding strong key messages, engaging graphics, and punchy text can all make an executive summary stronger. A simple five-box structure is an effective way to build a truly compelling executive summary.

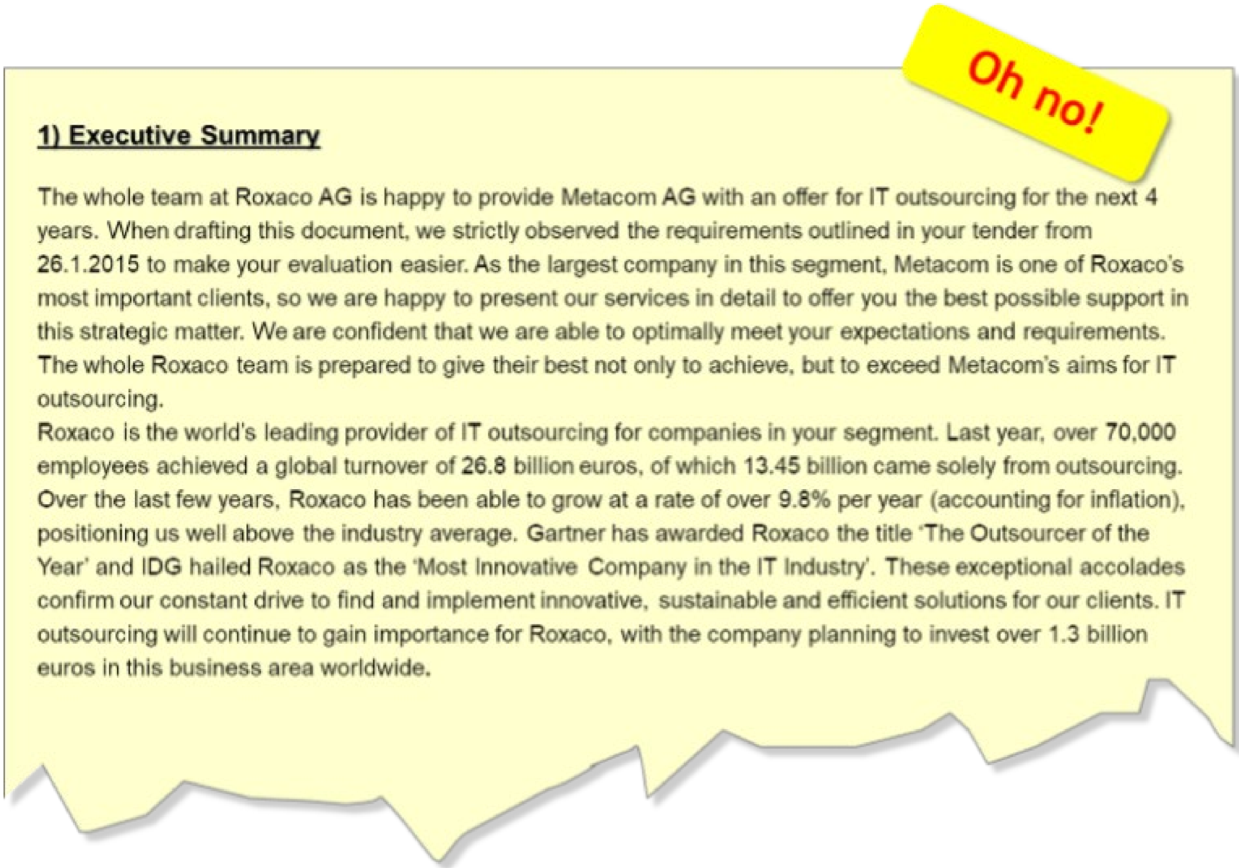
If your executive summary is professional and persuasive, reviewers are likely to expect the same from the rest of your proposal. So, crafting a strong executive summary sets the stage for a winning proposal.

Main aim: Communicate “Why us?”

As its name suggests, an executive summary should be a summary. Its main aim is to convince a reader to pick you, your team, and your solution. The executive summary must answer the question “why us?” So, instead of a summary of the technical aspects of your solution, you should think of it as a summary of the reasons the customer should choose you.

Executive summaries are valuable in all proposals, but especially so in question-and-answer (Q&A) solicitations. In Q&A solicitations, you are often limited to submitting predefined answers and there’s little room to differentiate your offer, leaving the executive summary as your only chance to communicate these key points.

It’s not uncommon for people to struggle with writing executive summaries. Too often, they end with text full of sales speak, marketing clichés, and pointless statements that do more harm than good, like the example provided in Figure 1.



Oh no!

1) Executive Summary

The whole team at Roxaco AG is happy to provide Metacom AG with an offer for IT outsourcing for the next 4 years. When drafting this document, we strictly observed the requirements outlined in your tender from 26.1.2015 to make your evaluation easier. As the largest company in this segment, Metacom is one of Roxaco's most important clients, so we are happy to present our services in detail to offer you the best possible support in this strategic matter. We are confident that we are able to optimally meet your expectations and requirements. The whole Roxaco team is prepared to give their best not only to achieve, but to exceed Metacom's aims for IT outsourcing.
Roxaco is the world's leading provider of IT outsourcing for companies in your segment. Last year, over 70,000 employees achieved a global turnover of 26.8 billion euros, of which 13.45 billion came solely from outsourcing. Over the last few years, Roxaco has been able to grow at a rate of over 9.8% per year (accounting for inflation), positioning us well above the industry average. Gartner has awarded Roxaco the title 'The Outsourcer of the Year' and IDG hailed Roxaco as the 'Most Innovative Company in the IT Industry'. These exceptional accolades confirm our constant drive to find and implement innovative, sustainable and efficient solutions for our clients. IT outsourcing will continue to gain importance for Roxaco, with the company planning to invest over 1.3 billion euros in this business area worldwide.

Figure 1: Widespread practice, but not best practice: Many executive summaries are a jumble of polite nothings and marketing clichés.

Effective executive summaries make an evaluator's job easier. Evaluation teams are happy to find pre-written arguments they can simply take to their managers (i.e., the decision makers) when they recommend you as the selected bidder. Those who read your executive summary must clearly understand your technical or conceptual solution, and more importantly, its benefits. Enable your evaluators to justify recommending your solution over competing solutions.

Written for decision-makers? — not really

As the words "executive" and "management" suggest, many people expect that the executive summary is read by executives. But this is rarely true. Often, top managers are too busy to read proposals, or even just portions of them like the executive summary. These decision makers commonly rely on their evaluation team to provide recommendations about which bidder to choose and why, supported by evaluation reports and matrices.

One question remains: who reads the executive summary? Answer: everyone else!

- **The evaluation team reads the executive summary.** Proposals are generally evaluated by a team of people. Each member of the team is responsible for evaluating a certain aspect of the proposal. They have neither the time nor the inclination to read each bidder's entire proposal. However, each evaluator also needs to establish an overall understanding of the bid. That's why most evaluation team members read the executive summary.
  With a compelling executive summary, you can give the evaluator a positive image of your proposal at the very beginning of the evaluation.
- **Employees in your own organization read the executive summary.** In its earliest draft forms, your executive summary is an excellent briefing tool. You can use it to inform your team and management about your proposal's most important points. If your proposal team has a close relationship with the customer, they may even be able to help you come up with some of the content.

Regardless of who reads it, the executive summary should be written as if for executives: short, clear and to the point. Because the executive summary is read by many different people, investing time in writing your executive summary pays off more than any other section of the document.

Use summaries throughout your proposal

Summary-style content doesn't have to appear only in your executive summary.

Begin each section of your proposal with a section summary in the form of a theme statement. You can use focus boxes to draw the client's attention to unique benefits of your solution and back up your claims with proof points within the section.

To improve consistency throughout your document, plan your executive summary and section summaries first. This helps create a consistent storyline through your proposal, no matter the length or number of contributors.

Mirror your executive summary themes in the proposal cover, title, and cover letter.

The proposal title, packaging, cover letter, and executive summary are highly visible parts of your proposal package. Each of these components makes a strong contribution to the persuasiveness of your offer and your customer's first impression of the bid, so it is critical that your message and visuals are compelling and consistent throughout your proposal document.

Best Practices

1. Follow the client's instructions

If applicable, strictly adhere to your client's specifications.

If the customer gives specific instructions for the executive summary's content or location in a proposal, follow those instructions. If you don't follow them, you risk your customer thinking that you don't listen to them. That's not a great place to start from when the executive summary is typically seen early in a proposal.

If your customer specifies the content, position, or form of the executive summary, weave the key points of these best practices into the framework the customer provides. If there's a conflict between best practice and your customer's requirement, your customer's requirement overrides best practice guidelines.

2. Always write an executive summary (especially for proposals over ten pages).

In principle, any large proposal needs an executive summary.

Its recommended that any proposal over ten pages has an executive summary. If the customer does not specifically ask for an executive summary, include one anyway. Unless explicitly forbidden by the customer (which happens from time to time), you should always write an executive summary. Always.

3. Strategically assign writing and review responsibilities.

Who should write the executive summary? Its common that many people with different skills (e.g., writing and editing), competitor knowledge, and customer expertise cooperate to craft the perfect executive summary:

- **Sales/opportunity/capture team members are key contributors.** Sales and/or opportunity/capture staff should know what the customer wants to read. That's why the sales team's contribution to the executive summary is undoubtedly important and never up for discussion. Sales staff must be able to deliver key points before the kick-off meeting.

  In this stage, the writing doesn't need to be perfect. A structured writing approach can help coalesce ideas. Most importantly, sales/opportunity/capture team members should provide the customer's business drivers, aims, or hot buttons.

- **The opportunity/capture manager/executive should take a lead role in writing.** Ideally, the opportunity/capture executive writes the whole executive summary with support from the proposal manager. However, it's often enough for the sales executive to define the customer's business drivers and challenges, support the proposal team in the development of key messages, then review the finished executive summary for customer relevance. This is the minimum-recommended level of support from the sales/capture executive.

- **Use writers, designers, and editors to polish the executive summary.** When a draft is written, a skilled writer can refine the wording and a graphic artist can create the visual imagery. Use a Proposal Editor to carefully eliminate potentially deadly typos and grammatical errors.
  Depending on the size of your team and organization, these roles may be filled by the bid manager, proposal manager, or an editorial specialist on the proposal team.

Review your executive summary regularly through the proposal process. When choosing reviewers for your executive summary, make sure you have a good mix of client knowledge, competitor knowledge, solution capabilities, past performance, and writing skills.

4. Make sure the section has a name.

Identify the executive summary by whatever name the customer uses in its instructions. Common names include proposal overview, management summary, and management overview.

You can also extend the heading to make it informative. For example, if the customer's RFP asks for a "Management Summary," your heading could be "Management Summary – saving 23% of shipment costs with ABC." This way, you have complied with the customer's instructions, and made it easy for them to navigate since it bears their own wording. And you have included a benefit to add some appeal.

5. Draft and review early.

The executive summary is the most scrutinised part of your proposal so you should make it especially good. An executive summary thrown together at the last minute is rarely compelling. You'll likely never have a finished and compelling executive summary before the kick-off meeting, but you should get used to writing a rough draft of the executive summary very early and improving it over time.

Draft the executive summary early in the bid process (starting with bullet points, for example) and develop, improve, and build on it over time. Ideally, the Opportunity/Capture Manager presents a first draft of the executive summary at the bid/no-bid decision gate review.

You might find that your workload is too high during kick-off preparations to draft a complete executive summary. It may also be the case that the solution strategy isn't complete, so you can't describe it clearly enough in your executive summary. In these and similar cases, it makes sense to begin drafting after the kick-off meeting. This is still better than rushing to write the executive summary shortly before submission.

A realistic executive summary development process is:

1. During opportunity/capture analysis: Gather necessary inputs during the opportunity/capture analysis phase (or as early as possible).

Build your first draft around the answers to these key questions:

- What are the customer's issues? (i.e., hot buttons, pain points, or business drivers)
- Why did these issues arise?
- What results do they want to achieve by solving these problems?
- Which outcome or result is the most important?
- What solutions can you or your competitors offer?
- What results will each solution produce?
- Which is the best solution and why?

Traditional strategy tools like a strengths, weaknesses, opportunities, and threats (SWOT) analysis or a bidder comparison matrix can be good starting places for creating your first draft.

2. Between RFP analysis and kickoff: Shortly after the RFP analysis (or before if possible) and before the kick off meeting, prepare a first draft. Plan before writing. Prepare a content plan for your executive summary before you start writing. At this stage, your draft summary is a powerful internal tool to gain senior management endorsement. It can also serve as a briefing or alignment tool to get fundamental information across to the entire proposal team. At this stage, your executive summary should contain:

- **A re-phrasing of business drivers and challenges.** This is critical to demonstrating your understanding of the customer's needs. Answer these questions: What does the customer want to achieve? What's important to the customer? What are their hot buttons?
- **Key messages / theme statements**. Your key messages should answer "Why us?" and describe discriminators.
- **Rough draft solution.** Include your proposed solution. This may be in bullet points at this state (i.e., no full text yet), but should already include benefits.

3. During the proposal process: Make ongoing updates and edit the draft (by editor/proof-reader if possible).

4. During proposal reviews: Test, review, and finally approve the draft.

5. Shortly before submission: Add final prices and other last-minute touches.

Allow time for changes in the executive summary as your proposal effort progresses. Be sure to do a final proofread after any last-minute changes to preserve the quality. Keep production schedules in mind when editing to make sure there's enough time for layout, graphics, and printing.

6. Find the appropriate length.

There is no set length for an executive summary. The typical executive summary has about two pages, regardless of proposal length. Factors to consider when determining executive summary length:

- **The length of the executive summary should be relative to the size of the overall proposal.** The length of the executive summary often depends on the length of the proposal. For example, a two-page executive summary is a good size for a 30-page proposal. For extremely large bids (with thousands of pages), even a 10-page summary may be too short.
- **Follow your customer's instructions.** The customer's requirements supersede best practices. So, if the customer stipulates a two-page summary, provide a two-page summary.
- **Don't prioritize brevity over including the information you need to convey.** The "one-page executive summary" is often cited as the gold standard. In practice, a one-page summary is often not possible without compromising readability, graphics, or valuable information.

In general, keep your executive summary as short as possible. For any executive summary longer than two pages, use subheadings to ease navigation and understanding.

7. Position your executive summary first.

Think of the executive summary as an independent document, read separately from the other chapters. Formulate your summary to reflect this, and place it first in your proposal package. Other factors to consider:

- In most cases, the executive summary is a separate chapter at the beginning of the document (uppermost in the folder/binder/file, for example).
- In extremely large bids that span multiple folders/binders/files, you tend to see the summary presented separately (i.e., in its own folder/binder/file).
- Creating the executive summary as a separate document (i.e., a separate file or included behind a separate tab in a binder/folder) or "just" as a separate chapter/section is a matter of taste or opinion.

Any customer specifications contradicting these best practices take top priority.

8. Use a customer-first structure.

Use a structured approach for your executive summary. There are many options for building a persuasive executive summary. One effective approach is the five-box structure. This easy-to-use tool consists of five sections or "boxes:"

- **Section 1: State the customer's business drivers, goals, and challenges.**
  People buy from people they trust. Use the first section of the executive summary to win your customer's trust by simply and concisely stating why your customer wants to make a purchase/requisition and what their business drivers and/or challenges are.

  This isn't about the technical requirements. Rather, consider the customer's perspective on why they're asking for a solicitation for this project. These business drivers are often called "hot buttons" or "pain points." This is your opportunity to connect with the customer first.

  This section articulates your understanding of the customer's hot buttons. Prioritize them according to what is most important to the customer. If you are an incumbent, show that you understand that needs have changed. You can also use this section to describe the characteristics a success partner needs. Ideally, later you will echo those sentiments in your own capabilities.

  Important: in this section, only refer to the customer's goals and challenges. Don't mention your organization or even your solution (yet)! You want to make sure the reader nods after reading the first paragraph (this is a valuable, and first, "yes" from your customer).

  Example (fictitious):

  'Customex Inc.'s current machinery has reached the end of its 12-year lifespan. Maintenance costs have increased significantly. Frequent disruptions to service don't just lead to annoyed customers, but also expensive and morale-destroying overtime for employees. At the same time, Customex must deal with increased pricing pressure from the competition, so has set the goal of decreasing all operational costs by at least 10% over the next two years. That's why, over the next nine months, Customex wants to replace all of its machinery with new equipment with half the disruption rate and at least a 10% reduction in operating costs. As well as these non-negotiable criteria, the ability to flexibly reconfigure the machinery to produce new parts will be decisive in choosing a supplier.'

If your customer says, "yes, that's exactly it!" after reading, then you've done it right.

- **Section 2: Introduce your solution (including key benefits).**
  After you have demonstrated that you understand your customer's challenges, briefly summarise the cornerstones of your solution or offer. Be sure to state the resulting benefits (as specifically and quantifiably as possible). Each benefit should, of course, be as tailored as possible to the needs you described in the previous paragraphs of the executive summary. Explain the value your customer gets for investing in your solution, but avoid too much technical detail. Instead, focus on benefits and clear discriminators. Always include concrete proof points to substantiate your claims.

  Use your proposal themes and best discriminators here. If you followed best practice when you developed your story, you can simply take the most important key messages (theme statements) from your solution description and place them in this section. You may need to adjust the language and phrasing a little, but you should have all the right components on hand because they were crafted in a feature/proof/benefit structure. This section should use the customer's name as often as possible. Even more frequently than your organization's name.

  Use graphics in this section to reinforce proposal themes and key statements. They appeal to visual learners and further support your messages.

  When you can, ghost your competition by indirectly highlighting their weaknesses (without naming them).

  This section is usually the largest part of your summary.

- **Section 3: The customer's investment (costs, price, conditions)**
  Many proposal writers struggle to incorporate prices into the executive summary, fearful of scaring off the customer with a high number. Generally, however, the executive summary should always include the price.

  Why? For a reason that is important to your customer:

  From the customer's perspective, the price is generally one of the most important pieces of information, whether we consider price to be a primary factor or not.

  You know that when you receive an estimate or quote, (for home or auto repair, for example), the first place you look is the price. You can expect your customer to have a similar reaction. You can use this to your advantage because your customer is likely to read the information around your "price tag." On the other hand, if your price is missing from the executive summary, your customer may skip to the price page and neglect reading any other part of your proposal. That's the last thing any proposal writer wants. Once there, the customer will focus on the price features of your offer (daily rates, unit prices, etc.) rather than understanding your solution. Avoid that reaction by including your price in the executive summary, with your most important content.

Only provide the most important prices in the executive summary. It can make sense to provide a price range (such as "depending on the option chosen"), only provide the most significant pricing components, or only state the overall price for the basic option. Don't include a detailed price calculation or a comprehensive pricing table in the executive summary.

To avoid "price shock," it's best to compare the price with the quantified benefit. Ideally, you should highlight the return on investment (ROI or the period it would take for the investment to pay off). If this isn't possible, estimate the quantified benefit (such as estimated savings in terms of additional human resources) to help the reader contextualise the price. Whichever option you choose, be sure to reference the benefits.

In some circumstances, you may have to provide additional details with your pricing. To provide the customer with the best understanding of your price, you should add details on price-affecting conditions (for example: "assuming that Customex already fulfill interface parameters").

There are certain situations where providing the price is in the executive summary is a bad idea. Some RFPs (mostly government) explicitly require that all pricing information is contained in the pricing volume. That information is usually packaged or sealed separately from the technical bid. This is based on the customer's belief that the evaluators of individual chapters should not be positively or negatively influenced by price.

- **Section 4: Show your customer the next steps.**
  In this section, you'll show that you didn't just focus on the RFP and the products. In this block, make it clear that you're looking ahead and actively thinking about the next steps.

  First, we have the steps that are on your customer's mind:

  "We'd be happy to present our solution and its savings potential to you in detail at your offices at the proposal presentation in calendar week 32."

  "We would also be happy for you to visit the reference contacts we provided. Our suggestion is…'

You could also make your own trust building suggestions:

"We invite you to our test centre, where we can demonstrate all solution components by way of a live simulation."

"An analysis workshop would allow us to fully specify details for the analysis software. At this workshop, we can verify expectations. This means Customex can rule out a number of risks."

- **Section 5: Wrap things up.**

  In the final section of the executive summary, you should review why the customer should choose you and communicate your willingness to ensure a successful collaboration.

  This is typically only a short paragraph or even just a single sentence:

  "Roxaco will do its utmost to ensure Customex's efficiency and performance targets are smoothly implemented."

  This isn't just intended to sweet-talk the customer, rather to provide a well-rounded ending for the executive summary and add a personal touch.

For any executive summary longer than two pages, use subheadings to ease navigation and understanding. Structural instructions from the client always override these recommendations.

9. Apply principles of clear writing.

Just like other text in your proposal, your executive summary should uphold the principles of clear writing. Your evaluators should not need advanced English degrees to understand your solution. Precise, engaging phrasing is even more important in the summary than in other proposal text. It should be written in natural, fluent, and compelling language. Avoid "corporate" or marketing speak.

One rule is especially important: be as specific as possible. When you write a summary, you run the risk of making it shallow and generic. Name the most important factors while staying very specific, as the comparison below shows:

Generic formulation:

"The use of a C3 processor facilitates increased speed, significantly reducing production costs."

Specific formulation:

"By using a C3 processor, you can increase speed by 25% and benefit from a reduction in production costs of up to 10%."

10. Visualise with graphics, charts and images.

Use images and graphics to support your message. This applies to your proposal's body as well as the executive summary. Visuals serve as guideposts through your proposal. Graphics can add emotional appeal while a professional layout makes the key points easy to see.

It can be difficult to make graphics that consolidate your theme statements while still effectively communicating them, but its worth the effort. If you manage to pack your key messages into graphics (with a focus on customer's benefits), they'll add considerable value to your proposal. Omit dense graphics or those that don't effectively support your statements.

Bonus tip: trying to express your most important theme statements in a simple-to-understand image is an excellent mental exercise during the proposal creation process.

11. Review and test the summary before submitting it.

Review and test the quality of your summary before submitting it to your customer.

- Have the executive summary read by a neutral person. Can they reiterate the key messages? If no, rework it to make the important points clearly identifiable, perhaps by using call-out boxes or graphics.
- Replace your organization's name with your competitor's name. Does it still read credibly? If yes, consider reworking the summary to make it more specific to your offer's benefits.
- Replace your customer's name with another customer's name. Does it still read well? If yes, make it more specific to your customer's needs.

Application in Diverse Environments

Using summaries throughout your proposal

Summary-style content doesn't have to appear only in your executive summary. Consider adding these types of content summaries:

- Begin each section of your proposal with a section summary.
- Use focus boxes to draw the client's attention to unique benefits of your solution (and be sure to back up your claims with proof points in the section detail).

If you plan your executive summary and section summaries before writing, they create a consistent storyline. This makes it easier for writers to understand how to write their section. Using this approach helps create a consistent storyline throughout your proposal, no matter the length or the number of contributors.

If it is not allowed…

If customer instructions or procurement rules disallow an executive summary, you can explain the key points of your solution in other ways, for example:

- In your cover letter
- In the first sections of your proposal body
- In the first paragraph of a short proposal

Recent Trends

Use creative and eye-catching packaging

Standard executive summaries are presented as plain text in a document format, ideally accompanied by graphics. However, some vendors have started to give their executive summaries a more "designed" look, presenting them in glossy magazine or booklet form (of course, only when this is not disallowed by the RFP).

Looking for something more creative and eye-catching? More innovative approaches include poster-format executive summaries or other creative treatments. All this helps make your summary stand out, reflects the importance of this key section, and differentiates your proposal from your competitors.

Use technology to add depth to your executive summary

Looking to add more content to your executive summary? Consider these tech trends:

- **Add video.** As electronic delivery has become the norm, bidders have started to embed short video clips directly into PDF files. Professionally produced videos are the most effective form of visual communication, perfectly suited to get your summary messages across.

- **Add QR codes.** If appropriate (e.g. if not breaking any confidentiality rules), you may want to provide a QR code that enables the reader to share the executive summary with other evaluators.
- **Add digital to an analogue submission.** If you're required to submit a printed proposal, you can still integrate video. Creating a video book is more work, but very impressive. These simple video players show a video sequence when the proposal book is opened and are available online.

Common Pitfalls and Misconceptions

Avoid common mistakes in your executive summary to deliver a high-impact document.

- Don't confuse the executive summarywith the cover letter. These are two separate elements of a bid. Be sure that your executive summarydoes not contain:
  - **A greeting.** The executive summary is a chapter of the proposal document, so it does not need a greeting. You shouldn't address anyone at the beginning of your executive summary ('to whom it may concern' or similar).
  - **Signatures.** While the cover letter (like any letter) should contain signatures, the executive summary most definitely should not. If you'd like to confirm the bid's binding nature with a legally valid signature, it could be a good idea to create a separate section called "official signatures," "offer certification," or "legally binding signatures."
  - **Polite nothings.** Eliminate polite yet meaningless statements such as "thank you for giving us the opportunity to prove our abilities."
- Don't use marketing copy or generic information in your executive summary. Instead, make it as specific to your bid and customeras you can.
  - "As the leading provider of," "we put the customer first," and other clichés do not belong in a proposal. While tempting to include them in your executive summary, they don't add substance or credibility.
  - Sadly, too many executive summaries read like marketing documents rather than sales documents. They often lack specific user benefits that could help the customer see that their needs will be met. Marketing copy is designed to address a market rather than an individual customer, which is why it's written to be general. A good executive summary is unique to each opportunity because solutions, client requirements, and competitors differ from one opportunity to the next. Overusing boilerplate or clearly recycled content may lead evaluators to think you have not thought carefully about their needs. The summary should provide readers with a business case or a value proposition to convince them to select you.
  - Don't add your corporate history to the executive summary. If you feel compelled to include it, do so as an appendix to the proposal.

- Don't confuse the executive summary with the table of contents. The executive summary isn't intended to serve as a navigation aid for the reader. Eliminate statements like "you will find the technical description in Chapter 3," since that's what the table of contents is for.
- Don't rush the executive summary at the end. Writing it two minutes before the submission deadline spells disaster. Write and review your executive summary early to be sure you create the best product possible.
- Don't write it just for executives. The executive summary should be aimed at both senior-level decision makers as well as everyone else on the evaluation team.

Terms to Know

- Bidder Comparison Matrix (BCM):

  A tool used to analyze the customer's current perception of your solution compared to competitors. It usually is a weighted score that indicates the customer's confidence that you can meet their requirements.

- Hot Buttons:

  Singularly important issues or sets of issues that are likely to drive decisions, usually associated with customer buying decisions. Hot-button issues are items that the customer repeatedly discusses and often are problems with a system, software, process, or resources inhibiting the success of the customer's organization.

- SWOT:

  The analysis performed by organizations to address competitive positioning and identify the outcomes needed to develop a compelling proposal response that wins the business. SWOT emphasizes the internal environment. TOWS emphasizes the external environment.

- Win Themes:

  The components of a proposing organization's win strategy. A win strategy can be made up of multiple win themes. A win theme must contain a feature, a benefit, and a corresponding proof point. Win themes should be reinforced throughout a proposal.

Graphics and Action Captions

Clear, compelling, audience-focused graphics (including covers) and action captions improve win rates. A 3M-sponsored study at the University of Minnesota School of Management found that presentations that use visual aids are 43 percent more persuasive than those that do not. Graphics also improve recollection by up to 86 percent and communicate faster than text alone. For example, in Figure 1, which approach makes it easier to understand and remember the concept of "a circle"?

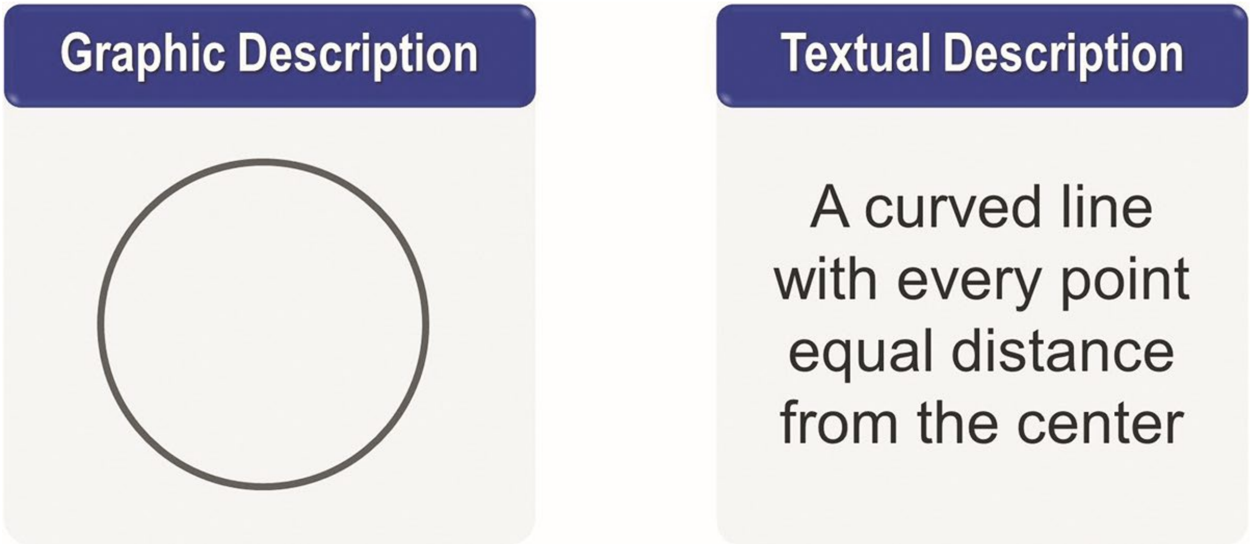


Figure 1. Graphics versus Text. *Graphics are often more understandable and memorable than text alone*.

Research shows:

- Graphics lead to a more profound and accurate understanding of presented material.
- Graphics grab our attention and may influence how (and whether) we attend to the rest of a story.
- Graphics enhance or affect emotions and attitudes and emotions influence the very mechanisms of rational thinking.

It is important to note that graphics are not better than text. As Mike Parkinson explains in Do-It-Yourself Billion Dollar Graphics, "The combination of graphics and words has a communicative power that neither singularly possesses. Without graphics, an idea may be lost in a sea of words. Without words, a graphic may be lost to ambiguity."

Similarly, J.R. Levin points out that "Pictures interact with text to produce levels of comprehension and memory that can exceed what is produced by text alone."

For this reason, action captions also play a critical role in evaluating and winning proposals. Understanding how to effectively use a combination of graphics and text can make the difference between winning and losing a contract.

Best Practices

1. Know when, where, and why to use graphics and action captions

Although it might seem counterintuitive, it's best to create graphics and action captions before you write a proposal. Begin with an action caption, then create supporting graphics—macro to micro. Then, use the graphics and captions as a roadmap for writing. Making graphics first ensures the team is on the same page, the solution is complete, and the proposal tells a coherent story.

Develop content in the following order:

- First, write action captions that express the messages you want to communicate to readers.
- Next, use action captions to develop graphics that convey these messages visually.
- Finally, use conceptualized graphics and action captions to write your proposal content.

There are three situations in which proposal graphics are especially important:

- **Your information is too complex for words alone.** Often a graphic can communicate complex concepts more succinctly than text alone. Consider network diagrams, quantitative charts, dashboard graphics, Gantt charts, organizational charts, and process diagrams. All communicate complex information better than text only.
- **The information is a critical success factor.** If the presented information is missed or misunderstood, you increase your chances of scoring low or being perceived as deficient. On the other hand, if the information is clear and compelling, you increase your chances of maximizing your scores and winning a bid.
- **You want to influence emotions.** The professionalism of your graphics impacts the perceived quality of your solution and helps build the trust that is required to win. Like it or not, decisionmakers and evaluators are influenced by the quality of the graphics used in your proposal. In fact, in a large U.S. federal government RFP, the first paragraph in boldface type under the "Instructions to Offerors" reads: *"Offerors are cautioned that the Government considers the overall form and substance of their proposal to represent the general quality of work expected to be performed under this contract. Accordingly, it will be considered throughout the review and scoring/evaluation process."*

Graphic dimensions should be driven by RFP requirements, your content, and your message, not rules of thumb like the "rule of thirds." Use as much or as little of the page as needed to communicate your message. Foldouts (e.g., a dashboard graphic) are recommended when the additional information is needed to clearly communicate.

To improve your likelihood of winning, make your proposal easy to review and evaluate. Here are a few ways to do this:

- Avoid graphics that require the reader to rotate the document, transitioning from portrait to landscape.
- Always include an action caption below your graphic.
- Introduce your graphics with a unique identifier (e.g., Figure 1, Exhibit 1, Table 1) in the body of your proposal for easy reference and tracking.
- Avoid referring to graphics elsewhere in your proposal.
- To ensure internal version control during graphic development, use a file naming and logging system that identifies the proposal, the graphic number, and the version number (e.g., XYZprop_001_v2). Place the log number within the graphic in a discrete location for future identification.

2. Write action captions and conceptualize graphics before rendering

Your action caption should be the message you want your graphic to convey and should be no longer than one sentence. The simpler you can make an action caption, the better. Actions captions are composed of three parts:

- Figure number
- Informative heading
- Complete sentence(s) explaining the relevance of the graphic to the evaluator, linking benefits to features.

If your goal is to influence, motivate, or persuade, your action caption should include a benefit and explain how this benefit is achieved. Avoid listing more than three benefits in a single action caption. Succinct, customer-focused action captions result in better graphics. When applicable, include proof and a discriminator in your caption. Figure 2 is an example of a benefit-driven action caption.

Figure 2. Graphics Supported by Action Captions. *Customer-focused, benefit-driven action captions improve the persuasive power of your graphics and proposal.*

Use your action caption to conceptualize your graphic. Avoid graphic reuse unless an existing graphic is consistent with (or can be easily modified to be consistent with) your audience and message. Never render a graphic before the action caption is written.

Seek validation at every milestone. For example, once an action caption is written, decide whether the caption meets the RFP's requirements and is customer-focused. After a graphic is conceptualized (i.e., sketched or prototyped), confirm that the graphic clearly communicates the intended message.

Figure 3 illustrates the recommended steps to follow to develop a successful proposal graphic.

Figure 3. The Four Steps for Developing Successful Proposal Graphics. *To develop a successful proposal graphic, begin with an action caption, create a concept, render it, and finally, implement it.*

3. Understand and use basic design principles

Every aesthetic decision should have a purpose. Avoid design choices that are inconsistent with your audience, message, or subject matter. Design choices should guide readers through your graphics, improve comprehension, and build trust.

Key design principles are:

- **Color**. Color has meaning and affects mood; therefore, all color choices should be deliberate and have a purpose. For example, if your goal is to brand your company, use your company's colors. If you goal is to build trust, you may choose to use your customer's colors. Choose a color palette before rendering graphics and avoid deviation. A change in color may cause readers to interpret a change in meaning. If meaning is unclear, readers may be confused.
- **Style**. The style of your graphics affects understanding and communicates volumes about your company and solution. Figure 4 shows the same subject matter designed in

two different styles. Style B is simplified and is easier to understand.

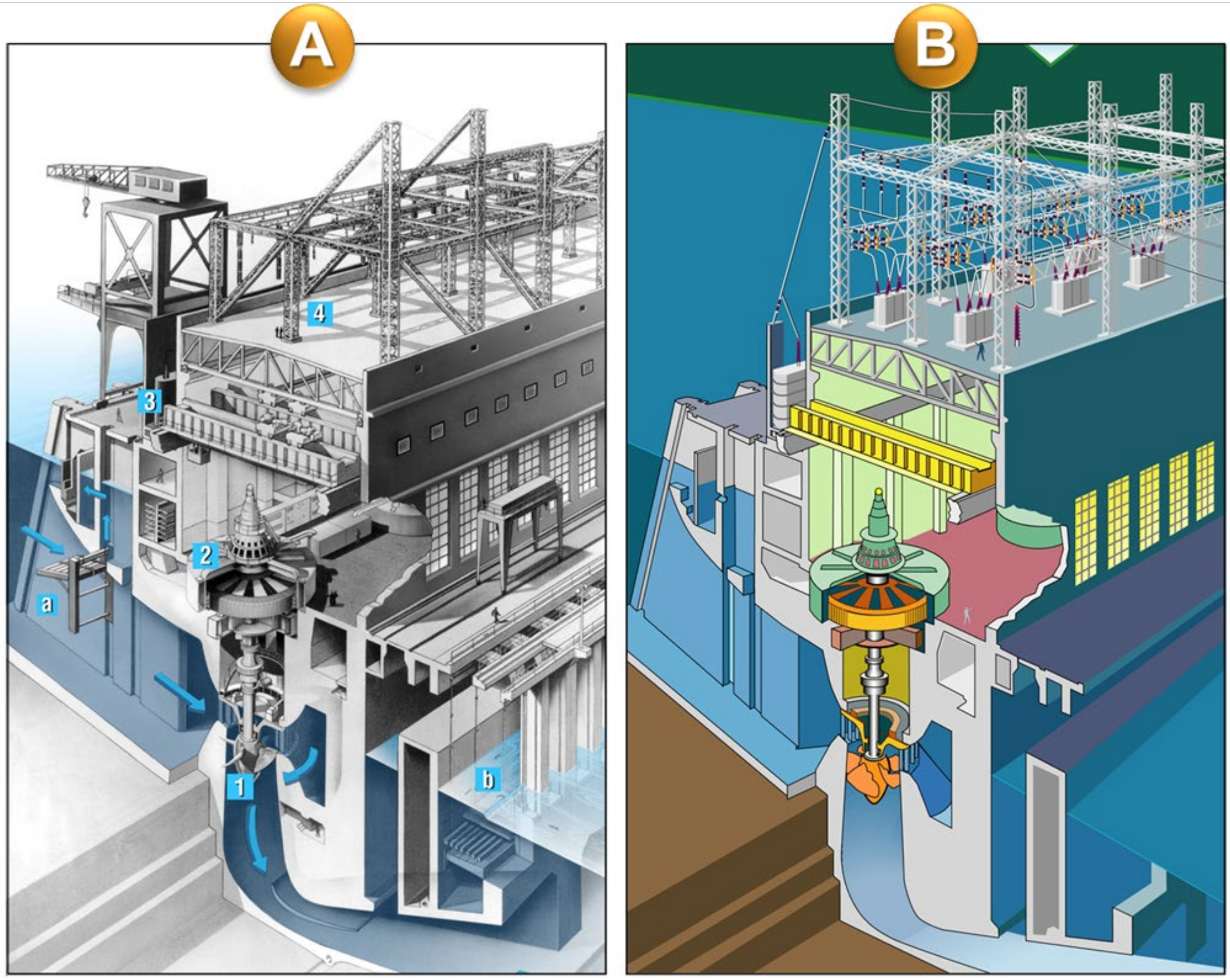


Figure 4. Understanding Graphic Style. Aesthetic style affects perception and understanding. *(Bonneville Generator graphic developed by U.S. Amy Corps of Engineers) (images.usace.army.mil)*

The style of your graphics communicates your company culture and approach to customer service, problemsolving, and other duties. For example, modern design sends unspoken messages that your company is cutting edge, young, and innovative. Aesthetically unappealing or unprofessional graphics could communicate that you, your solution, and your company are inferior and unprofessional.

- **Consistency**. Aesthetic consistency (through colors, style, lines, and fonts) communicates that your team is on the same page. Because consistency requires additional planning and effort, it shows that you place a high value on your proposal, the solution, and the customer. It demonstrates your company's commitment and professionalism.

- **Grid**. Most successful graphics use an invisible grid. Use a grid to ensure graphic elements are evenly spaced, orderly, and easy to follow. Figure 5 shows the difference between a graphic that uses a grid and a graphic that does not.

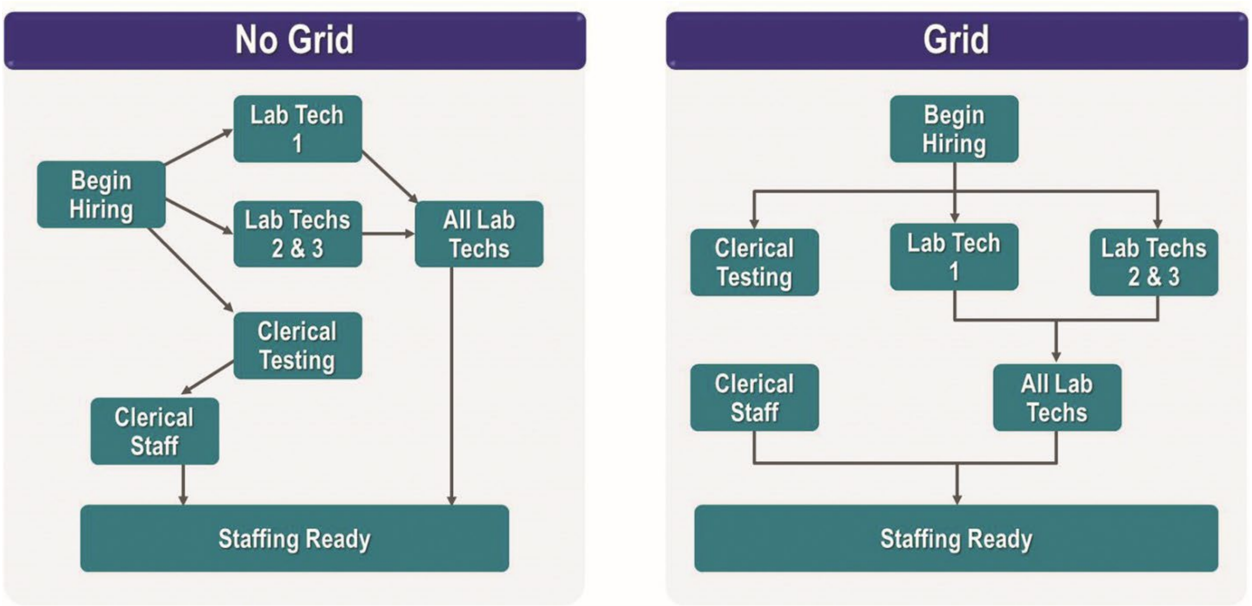


Figure 5. Designing Graphics Using a Grid. *Using a grid improves comprehension and understanding.*

Balance. Balanced graphics convey stability and harmony. Unbalanced graphics result in feelings of unease. Graphics achieve aesthetic balance when their left and right sides and, to a lesser extent, top and bottom visually "weigh" similar amounts, giving a sense of equilibrium. Figure 6 illustrates visual balance.

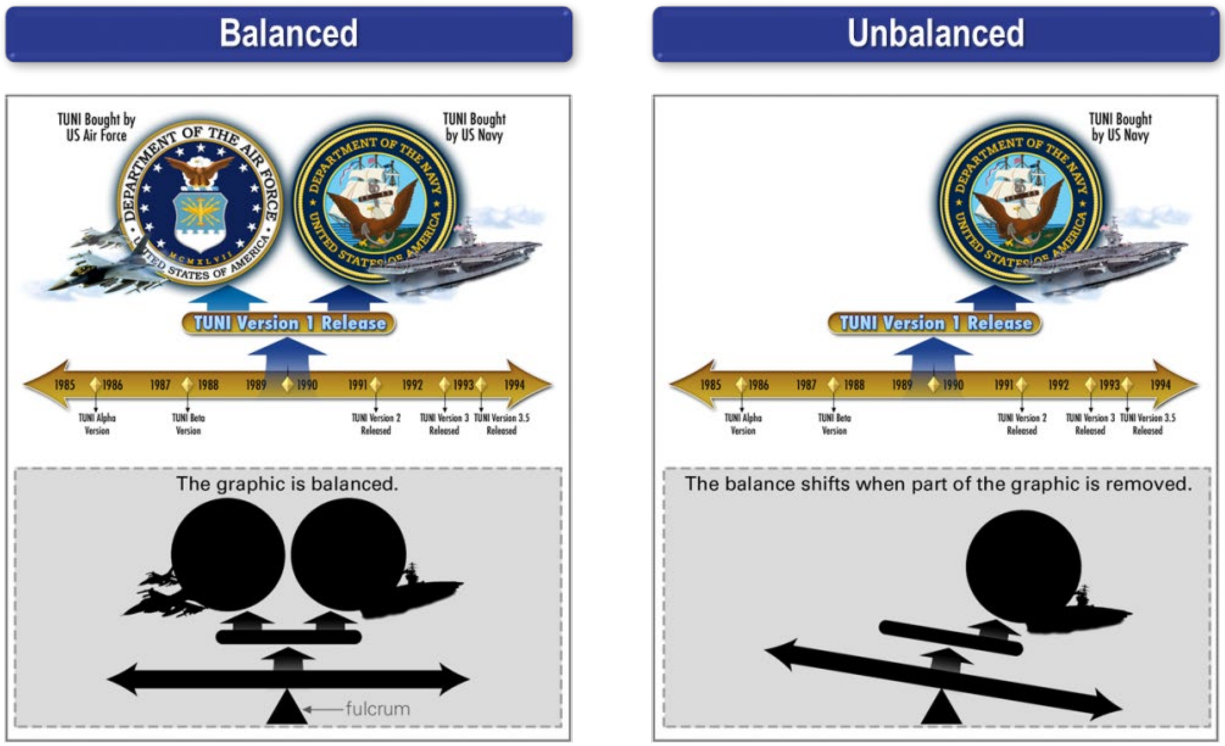


Figure 6. Designing Balanced Graphics. *Visual balance impacts mood and perception.*

- **Shapes**. Shapes and lines affect readers' perception and understanding. Diagonal shapes and lines are more dynamic and energetic. But when used in excess, they may evoke feelings of unease or agitation.

Too many diagonal lines, for example, result in a graphic that appears disorganized and disheveled. The graphic is usually difficult to follow. Horizontal and vertical shapes and lines provide a sense of stability. Using a horizontal and vertical layout communicates that the presented information is organized and controlled. Curved shapes and lines (circles, ovals, etc.) are soothing and calming and can help pacify your target audience. Curved, horizontal, and vertical shapes and lines often create a positive impression. Figure 7 illustrates the impact of shapes on mood and perception.

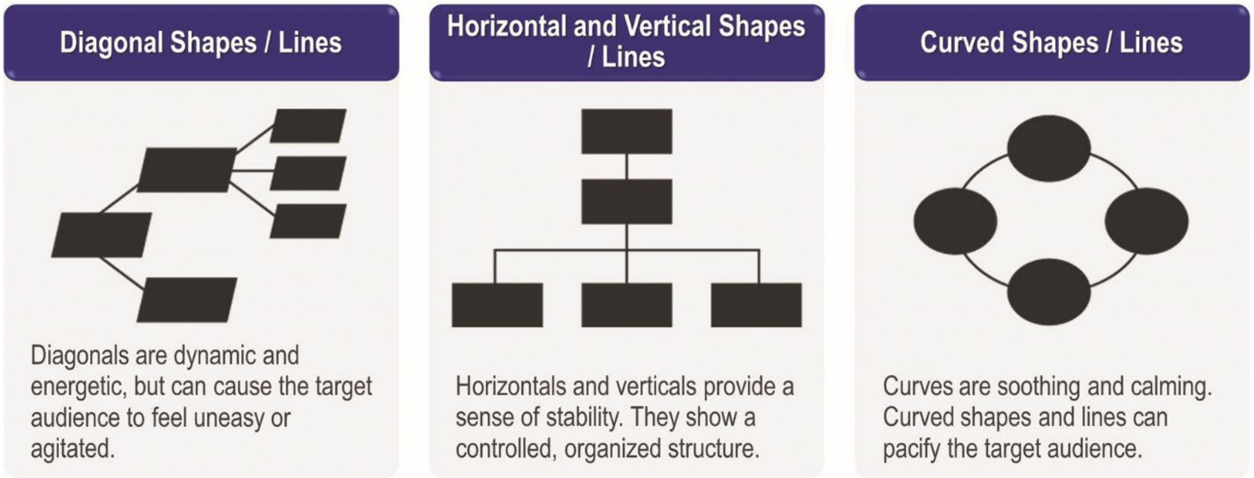


Figure 7. Using Shapes in Graphics. *Shapes and lines impact mood and perception*.

Use your action caption to conceptualize your graphic. Avoid graphic reuse unless an existing graphic is consistent with (or can be easily modified to be consistent with) your audience and message. Never render a graphic before the action caption is written.

Seek validation at every milestone. For example, once an action caption is written, decide whether the caption meets the RFP's requirements and is customer-focused. After a graphic is conceptualized (i.e., sketched or prototyped), confirm that the graphic clearly communicates the intended message.

4. Use templates

A *graphic template* is a key ingredient to quickly developing quality graphics. A template helps ensure consistency. A template also eliminates the need for reformatting. When working with a team, your template ensures that all graphics look as if one person or company created them. The resulting graphics demonstrate that the solution provider is acting as a team with one consistent vision.

To follow your template, choose a color palette, graphic style, arrow style, font, line spacing, and capitalization scheme—and stick with it.

It is imperative that your proposal graphics are understandable. Your template should take into consideration the following variables:

- The size of the graphic presented
- The medium on which it will be presented (e.g., printed page, projected)

- How you wish to be perceived. (e.g., emotions you wish to elicit)
- Branding your company versus selling your solution. Which is the most important in your company's short- and long-term strategies with this customer?
- Special considerations (e.g., vision-impaired audience, graphics duplicated in black and white for review).

5. Objectively validate your graphics

There are two variables to consider when validating that your graphic is successful:

- **Content**: If you were to remove your action caption, could the audience quickly (within 10 seconds) deduce the message? Is all content within the graphic germane to the action caption? If the answer is no to either of these questions, your graphic is likely to misinform, misdirect, or miss altogether. Figure 8 compares an unsuccessful proposal graphic and a successful one based on these criteria.

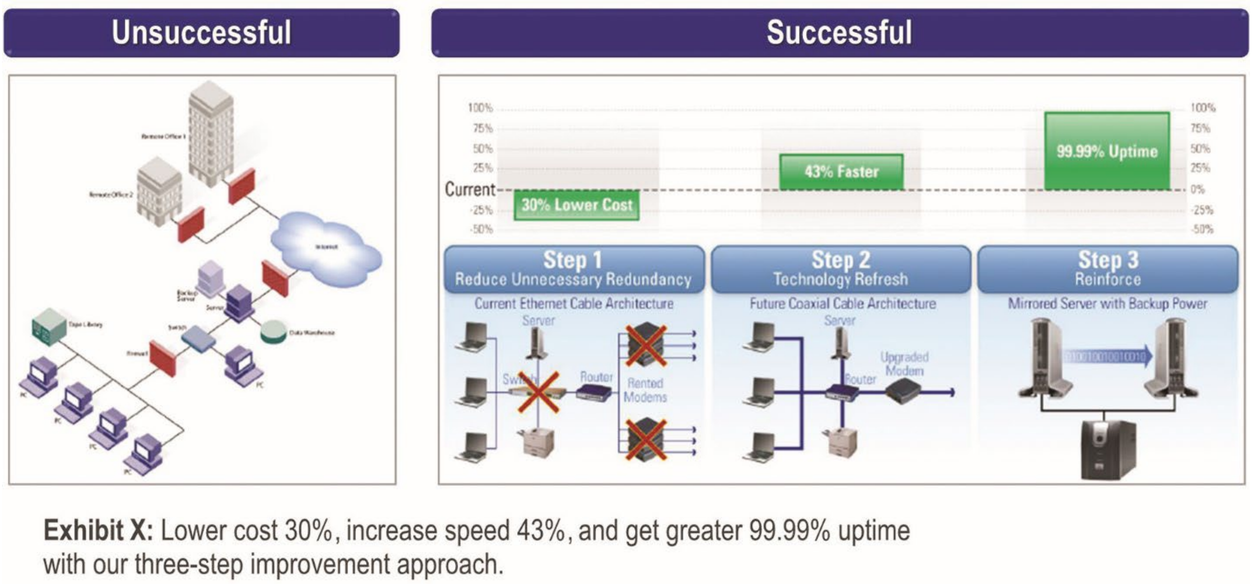


Figure 8. The Importance of Content. *Graphic content must be clear even in the absence of an action caption. The graphic on the right shows benefits more clearly than the one on the left.*

- **Aesthetics**: Does every aesthetic decision have a purpose? What message does the style of the graphic communicate? If the answers to these questions are inconsistent with your goals, then your graphic may lower your chances of success.

To ensure your graphics will be clear to readers unfamiliar with your solution, ask someone not on the graphics creation team to review your graphics for content and aesthetics.

6. Understand copyright law

If you do not have permission from the owner of an image, you cannot legally use that image in your proposal. All images are immediately protected under copyright law in almost every country. Copyright is normally valid with or without a copyright notice. Copyright law stipulates that once an image is created, the owner holds the rights to that image.

Excluding situations where an image is deemed in the public domain or is used in accordance with fair-use laws, reuse permission must be obtained from the owner (for free or for fee). For example, it is illegal to use a photograph or graphic from the Internet (e.g., a photograph found during an Internet search) if the rights of use have not been granted to you. It is legal to use photographs and graphics acquired from stock image websites and websites that grant the right of reuse for commercial use (i.e., for profit).

7. Know the differences between graphic file formats

Proposal graphics are usually embedded into page layout or presentation programs in a flat, uneditable file format (e.g., JPG, PNG, TIF) at a print resolution of 150 to 300 dots per inch, or DPI. This is referred to as a raster graphic (e.g., photograph). These files are resolution dependent, which means the final dimensions and presentation medium must be known to ensure image integrity, legibility, and quality.

Some file formats allow image compression (e.g., JPG). Compression decreases file size by lowering image quality. Avoid heavy compression when possible.

To avoid font and file size issues, create graphics at the same dimensions as they will appear in your proposal. For example, if your proposal graphic will be 6.5 inches (16.51 centimeters) in your proposal document, be sure that the original graphic has the same dimensions. To improve consistency and ensure compliance, when applicable, never scale the graphic after it is placed into your proposal.

Some proposals use vector graphics (e.g., most native presentation software and data graphics software). Vector graphics are resolution independent, which means all elements can be scaled without sacrificing image quality. File size is typically smaller and graphics remain editable.

Application in Diverse Environments

Defined processes in mature organizations

Mature organizations often have defined processes (e.g., conceptualization, rendering, tracking, editing), have access to trained designers, use higher-end graphic design tools, and have graphic asset libraries to speed graphic development.

Mature organizations track graphic development time and know the level of effort that is required to conceptualize, render, and edit graphics. This information allows proposal managers to effectively schedule graphic support and lower development cost.

Informal approaches in less-mature organizations

Less-mature organizations often create graphics as needed using an ad hoc approach. Graphics are usually rendered by the authors for the authors—before a customer-focused action caption is written. Older proposal graphics are reused primarily for expediency and not because of the graphic's synergy with current win themes, existing customer needs, or current message. Graphics are typically aesthetically unappealing, inconsistent, and unprofessional.

Sensitivity to cultural differences

All proposals, especially international proposals, should focus on customer culture (e.g., color, imagery, metaphors, communication style) to avoid miscommunication or a worse offense. For example, when submitting a proposal to a South African company, know that the color red can be associated with mourning. When proposing a solution to the U.K. Ministry of Defense, avoid photographs of another government's soldiers (unless it is obviously relevant to the proposed solution).

Common Pitfalls and Misconceptions

Using more detail than needed

A visual becomes too complicated when the author attempts to convey too many messages in one graphic or includes too much detail. This typically results from a poorly written or missing action caption.

Failing to explain yourself

An unclear graphic, due to lack of identification and/or explanation, happens when the author erroneously assumes that the customer understands the subject matter on the same level that he or she does.

Making design mistakes

Poorly rendered graphics result from a lack of design skill. These graphics are homogeneous at best and unprofessional at worst.

Summary

- Write customer-focused action captions before conceptualizing and rendering graphics.
- Create graphics before writing your proposal.
- Start with a graphic that summarizes your entire proposal (e.g., executive summary) and use it as a roadmap during proposal development.
- Use an objective, repeatable process and graphic templates to ensure consistency, lower cost, and improve win rates.
- Know when and when not to use graphics.
- Ensure that all aesthetic decisions have a clear purpose that is consistent with the RFP, audience, and message.
- Track graphics development to effectively schedule and staff graphics support for future proposals.
- Understand that the style and professionalism of your graphics reflects your company culture, the professionalism of your company, and the quality of your solution.

Terms to Know

- Action Caption
- Aesthetics
- Balance (Visual)
- Graphics Template

Headings

Introduction

Effective headings highlight your solution's benefits and discriminators. Good headings should convey a clear message, capture the reader's attention, and address evaluators' hot buttons or specific requirements. Compelling headings accomplish the following goals:

- Break large amounts of text into smaller, more manageable sections
- Make important information easy to locate
- Simplify complicated information
- Make your proposal easier to score
- Guide readers through your proposal story

Formal evaluators score specific responses according to specified evaluation criteria. Informal evaluators, on the other hand, target specific topics to read and assess. Both types of evaluators can benefit from clear headings that guide reading.

Proposal writers and contributors to proposals should use headings best practices when creating their content. Use introductions to the main sections within proposals to help build on the heading and to support the deployment of your discriminators and benefits throughout your proposal.

Best Practices

1. Follow exact bid request instructions for proposal headings, including heading content, numbering scheme, and heading levels.

A compliant proposal is crucial to winning a bid. For some proposals, this means that organizations may be required to follow customer guidelines regarding heading content and format.

If the bid instructions don't specify a heading format, use the exact main headings and subheadings used in the bid request. Mimicking evaluators' topics and sequencing makes it easy for evaluators to find responses to evaluation questions. (Of course, this does not include repeating misspelled or incorrectly numbered headings).

The table below shows two ways proposal developers can present headings, one using exact headings given in instructions and one using headings with supporting details added (as allowed). These more benefit-led headings are often called "active headings"—their purpose is to help ensure the reader is drawn into the associated content.

USING EXACT RFP HEADINGS (DICTATED IN INSTRUCTIONS)	MANIPULATING RFP HEADINGS EFFECTIVELY (NOT DICTATED)
3.0 Bidder Financial Status	3.0 Financial Status: [Company] witnesses 20-percent increase in revenue figures during the past two years
3.1 Year 2013 Revenues	3.1 Year 2013: Remarkable increase in telecom services revenues
3.2 Year 2014 Revenues	3.2 Year 2014: Significant improvement over the past 10 years, achieving 20 billion USD revenues

2. Use an informal table of contents.

Including an introductory paragraph or each section aids clear responses and gives evaluators an idea of what information to expect in the section that follows. Proposal professionals refer to this paragraph as an informal table of contents or section introduction.

Review this section introduction every time you edit a section or heading in your proposal content. Ensure the informal table of contents reflects omissions or additions to the write-up. Below is a sample informal table of contents, followed by proposal subheadings using identical language for easy navigation.

1.0 Introduction

The RFP emphasizes ZAD Airlines' requirements for delivery of the System Integration project in a mandated duration of eight months.

Our Implementation Scope

1.1 Upgrading Check-In Systems

1.2 Upgrading Baggage Reconciliation Systems

1.3 Installing Flight Display Systems

1.4 Conducting User Acceptance Testing

1.5 Conducting User Training

Proposal subheadings appear as follows:

1.1 Upgrading Check-In Systems *at 5 Designated Airports in Europe.*

1.2 Upgrading Baggage Reconciliation Systems *at 5 Designated Airports in Europe.*

1.3 Installing Flight Display Systems *at 5 Designated Airports in Europe.*

1.4 Conducting User Acceptance Testing *to Ensure All of ZAD's Airport Systems are Integrated via the Core Room at Your Head Office.*

1.5 Conducting User Training *for Operational Teams.*

3. Use headings to convey key benefits and discriminators.

Your solution's benefits and discriminators are the most important message you must communicate to proposal evaluators. Use headings to catch the reader's attention and explain what sets you apart.

Of the following two headings, which one is most effective?

EDE's New Release Of World-Class E-Gates Version 0.6

Our E. Gates System V0.6 Has Reduced Passenger's Check-In Time to 7 Minutes

The second heading focuses on benefits to the bidder: reducing passenger check-in time at a highly congested airport.

4. Use informative and telegraphic headings as appropriate.

Informative headings are like headlines in a newspaper: they create interest and encourage readers to continue reading. In proposals, they enable evaluators to immediately determine both the contents of a section and the benefit to their organization. Informative headings signal new topics to evaluators, may link features to benefits, and often cite features that are discriminators.

Good, informative headings are also inclusive, meaning that reviewers can read headlines alone and still understand your message. For example, the heading, "Three Benefits of Our Solution: Lower Costs, Fewer Errors, Less Downtime," tells the reader that the discussion will consist of three parts and is likely to begin with cost, followed by accuracy, then maintenance requirements.

Effective headings will convey key selling points with clarity. One way to develop good headings is to write them as early as possible in the creation of the proposal outline. As you read through a new RFP, determine your key selling points and write informative headings to match.

Use telegraphic headings to label major proposal sections. Although they are less engaging for the reader, telegraphic headings work for standard sections such as Executive Summary, Proposal Overview, Technical Proposal, Appendices, and Clarifications.

5. Use verb headings to convey action and noun headings to demonstrate your purpose.

Verbs in headings can persuade readers by illustrating the actions that will result from choosing your solution. Write verbs in the same tense throughout your document. Limit or avoid question headings, as they give the impression of uncertainty. Here are examples of verb headings:

- **Reduce** Airport Congestion by Implementing EDE's Check-In Systems

- **CutDown** Check-In Time by 40 Percent
- **Ensure** Smooth Airport Operations Even With Increased Passenger Volumes.

Noun headings are ideal for giving brief answers to straightforward questions in the bid. Providing responses to crucial bid questions in the headings frees evaluators from having to read a proposal's full text to get the answers they need.

For example, a bid question might check whether bidders have a local presence in Kenya. Heading 3.1 highlights the bidder's presence in Nairobi without having to go into unnecessary details.

- 3.0 Three hundred fifty offices worldwide
- 3.1 More than 10 EDE staff based in the Nairobi office
- 3.1.1 Delivery and operations teams available on-site 24×7

6. Create a clear information hierarchy.

Ensure second- and third-level headings relate to their primary headings. Unrelated subheadings create confusion, leading to lower scores.

Numbered headings help evaluators find responses to requirements in longer proposals (more than 10 pages). However, headings with more than three levels can create confusion.

After level three, use run-in headings to give a similar effect to a new subhead without creating additional heading levels. A run-in heading may be in boldface or a large font; text follows after a period or a colon and a space.

7. Maintain consistency throughout your document.

Headings can be aligned right or left, centered, indented, or presented as run-in headings. No matter what style you choose, ensure headings at the same level are consistent throughout your proposal.

Any difference—in size, color, font, or other styles—must be made with a purpose or you risk causing confusion. Vary appearance in this order: font size, boldface, color, italics, font change, all caps, and underline.

You should also be sure that your headings are grammatically consistent or parallel. Parallel form means simply that you phrase like items in a like manner, which allows evaluators to move quickly through your proposal without being slowed by awkward shifts in structure. The table below shows the difference between nonparallel and parallel headings.

NONPARALLEL	PARALLEL
What Is the Problem?	A Brief History of the Problem
Describing What Acme Can Do to Solve the Problem	A Description of Acme Solutions
It's a Matter of Time	A Timetable Acme Can Follow
Fees Acme Will Charge	A Breakdown of Acme's Fees
When You Need to Pay	A Payment Plan
Finding Out Who's Who	A Listing of Acme's Staff

8. Create section introductions beneath active headings.

Where Q&A-type proposals do not lend themselves to telling your story, use active headings as described within this section. As long as you remain within the rules of the game, proposal writers should consider whether to add short introductions to the main chapters or sections within the proposal to summarize the key points outlined within the following section. The benefits of a few short sentences under a compelling heading can help influence the reader before they get into the detail of evaluating your answers to questions or assessing whether you address the customer's requirements.

For example:

This section contains all the technical questions you've asked us to respond to in your RFP. Within, you'll see that we offer not only 100 percent compliance with your technical requirements but also how we'll provide you with access to our engineering team leader on a monthly basis. These sessions will give you, a key customer, a unique opportunity to influence the direction of our technology roadmap.

Application in Diverse Environments

Stricter guidelines for government proposals

Government bid requests usually dictate the layout and format for proposals, including headings. Evaluators of government offers are usually looking for specific responses to RFP questions and tolerate few deviations from response quality they expect to see. Nongovernmental organizations, on the other hand, tend to focus on dictating only the content of each section.

Challenges with translated RFPs

Translated bid requests sometimes lead to misinterpretation of RFP requirements. It is advisable, therefore, to engage a bid team member who understands both languages while writing the response. This is particularly important in the case of headings, which signal both a proposal's organization and its key selling points. Multinational companies can achieve this, as they often have bid team members familiar with multiple cultures and fluent in multiple languages. Small organizations usually rely on local bid teams, however, meaning that they may have greater challenges in writing effective headings.

Recent Trends

- **Matching headings to value proposition** – Ensuring all headings support a proposal's value proposition is a relatively new technique that has led to positive results for many bid teams.
- **Capitalizing only the first word in a heading** – This makes text more readable. This trend is adopted from newspaper-style headlines.
- **Using serif fonts in headings** – Serif fonts also make text clear and readable. Increasing font point size creates emphasis.
- **Creating a library of heading styles** – A library makes styles ready to use on every new proposal. Some software programs come with templates that include predesigned heading styles, which can make style selection easier and less time-consuming.

Summary

- Effective headings attract the readers' attention, tell them what to expect in subsequent sections, and help evaluators find responses to specific questions easily.
- Where possible, use the exact headings listed in the RFP, especially in government proposals.
- The most effective headings are informative, numbered, and consistent in structure.
- Verb headings express action; noun headings state a purpose.
- Make your subheadings identical to the topics listed in your introductory sections. Review the listed topics every time you modify your text.
- Consistency in heading styles is critical; proposal producers should create their own libraries of heading styles.

Terms to Know

- Benefit
- Discriminator
- Feature
- Hot Buttons
- Informative Heading

- Telegraphic Heading
- Value Proposition

Tools and Templates

- Checklist-for-Writing-Effective-Headings.docx

Interviewing Subject Matter Experts

An SME's novel or seemingly "throwaway" idea, piece of tacit knowledge, or anecdotal success story can bring your proposal to life and, in some cases, be the springboard to an entirely new and more authoritative framework or flavor for your response.

A writer's ability to extract this information and produce content based on it is critical to generating winning proposals. Not all SMEs assigned to creating proposal content have the skill to convert their knowledge into compelling responses. A proposal writer who skillfully interviews an SME and helps them articulate their knowledge performs a valuable service for the SME and the proposal.

Introduction

Creating a response that differentiates your offering from a competitor's is often not as simple as demonstrating your solution's superiority. Your response will also be differentiated by how well it demonstrates your understanding of the customer's issues and how they can be addressed. This is particularly true when there's only a slight difference between your products or services and those of your competitor.

SMEs can provide information that is not available from anyone else on your proposal team. Applying insights and perspectives from these unique and potentially untapped sources will maximize your chance of creating content that offers depth and actual know-how and adds value. SMEs can provide authoritative content to support a specific proposal and generate content that you can keep for future proposals.

Finding SMEs in your organization with valuable new insights may be easier than you might think. If your organization has an active internal messaging platform, add a post announcing that you're seeking an SME who is available to be interviewed. Ask your colleagues and contributors to previous comparable work or responses. The SME you're looking for could be as close as a single referral away.

Best Practices

1. Decide what you want to learn.

Most SMEs are likely to be busy delivering work for your existing clients, so their time will be precious. When approaching them, be clear in your own mind about the information you are seeking. Before you write your questions, clearly define the range of topics you will explore. Help your SME prepare for the interview by sharing these topics when you initially approach them.

If time and resources allow, consider interviewing more than one SME. This can be helpful when exploring wide-ranging subject areas or controversial topics. Also, you will likely achieve a more well-rounded perspective by seeking more than one opinion on any subject. Be careful, however, not to cast too wide a net. A single, authoritative viewpoint is potentially more valuable to your proposal than several contradictory viewpoints, which can leave you with little useable material. When interviewing multiple SMEs, the key is to obtain a range of valuable insights—not contradictions—into your organization's solution and how it fits your customer's needs.

2. Create a list of interview questions.

Draft your questions with specific SMEs in mind. The following approaches will help you create questions that uncover the most valuable insights:

- **Understand the subject and the SME.** As much as your time and ability allow, research the interview topic and the SME's background. By having at least an introductory understanding of your SME's area of knowledge, you'll ask better questions and feel better about which topics to explore in more detail as the interview proceeds.
- **Ask open-ended questions.** Yes-or-no questions are unlikely to help you gain insights. On the other hand, open-ended questions will prompt SMEs to offer you more expansive answers, which is where the greatest value lies. Not only will open-ended questions yield more detailed information, but they are also likely to prompt SMEs to discuss areas you may not have considered asking about.
- **Ask, "So what?"** Often, clarifying an SME's points by asking questions such as "What advantage does that offer?" or "What value will that deliver?" will help you drill into the specific benefits that will add real value to your content.
- **Ask a good wrap-up question.** Although SMEs often provide answers beyond your line of inquiry, they will still be constrained by the actual questions you ask. As you end your interview, you can prompt SMEs to offer their unspoken ideas by asking, "Is there something you wish I had asked you about?" or "Is there anything more you'd like to add?" This will help you make sure your content doesn't miss an important point.

3. Conduct your interview.

When conducting the interview, be respectful of your SME's time. Offer them clear advance guidance about the information you're seeking and how long it will take. The following approaches will help you conduct an organized interview that yields valuable insights.

Set clear expectations for the interview

Once an SME agrees to be interviewed, send a confirmation message explaining how long they should expect the interview to take and the topics you plan to cover. Consider including your specific questions so the SME can begin thinking about their answers in advance.

Record your conversation

In time-constrained conversations, responses can come so fast that even a skilled interviewer might not capture or remember them all. Ask the SME for permission to record your interview so that you don't miss any ideas, particularly those whose importance you might not grasp at the time they are offered. Even after you've used the SME's answers to write your proposal content, keep the recording so you have their original answers on hand.

Allow the conversation to unfold naturally

A conversation that flows in a relaxed and natural way will allow SMEs the space to explore and unpack their thinking and experience. Take a few moments at the outset to establish rapport with the SME before launching into your questions.

Rather than force the conversation to follow a script, which might feel stilted, allow your interview questions to guide your conversation with the SME. Even if your time together will be short, avoid rushing the SME, and allow them time to consider their answers. Be sure to ask for clarification when necessary.

Seek more detail by asking follow-up questions

Interviews are dynamic events between two people. Just as you will decide in the moment how best to ask your questions, your SME will be deciding in the moment how best to answer and how much information to provide. When your SME offers a novel or insightful idea, when they hesitate, or when they indicate they might have more to share, invite them to expand on their thoughts by asking follow-up questions.

Take notes on the most important points

Even if you are recording your interview, taking notes will help you capture some of the standout concepts. In a face-to-face interview, it also lets the SME know when you consider something they said particularly important, which might prompt them to expand on it. After the interview, these notes will help you structure your content.

4. Analyze the output from your interview.

After you review your interview recording and notes, reflect on what seemed to be the most important parts of the discussion. Summarize your SME's answers to each question in one or two sentences. You can then structure these new ideas into individual sections of content.

To get the most out of your interview answers, know when to summarize your SME's point and when to paraphrase it. You can summarize the information if you need only to communicate the issue in an overarching sense. However, if the SME has provided information about a complicated topic, you might need to paraphrase what they said using simplified language. This is especially true if the evaluators are not specialists in your SME's field. Either way, be careful not to oversimplify and lose sight of the underlying complexities.

5. Validate and expand on your content.

Once you have drafted your content, send the SME a copy. Ask them to check that your content faithfully captures their thinking and invite them to expand on any areas where they have additional thoughts. If the interview and summary process has raised more questions for you, ask the SME for additional input or refer you elsewhere.

Application in Diverse Environments

While in-person interviews may be preferable for their ability to foster genuine engagement, virtual interviews are also common. Plan for a virtual interview by familiarizing yourself with the platform and equipment you'll use and practicing your interview questions. Remember also to account for time zone differences when scheduling your interviews.

For interviews regarding highly technical subject matter, consider inviting another attendee who has a more technical background, as they can help you shape your interview material into confident writing about the subject's complexities.

Recent Trends

Customers now tend to ask more complex questions that require particular SME input. This means the need for SME interviewing is increasing.

Common Pitfalls and Misconceptions

Sometimes, Proposal Managers will ask SMEs to create their own proposal content. However, many SMEs are not good at creating compelling material. Proposal Managers should, as early as possible, identify the SMEs who may need help and assign writers to support those SMEs using the interview techniques described here.

Summary

SMEs are valuable information resources, and interviewing SMEs is an important part of proposal creation. Prepare for your interview by defining the specific information you want to learn and sharing these thoughts with the SME. Prepare a list of open-ended questions and allow the SME to direct the conversation. Record the interview and respect the SME's time. After you've written content based on the SME's knowledge, ask them to review it to ensure you've captured their thoughts correctly.

Terms to Know

- Subject Matter Expert
- Open-ended Question

Maintaining a Library and Writing Standards in Your Organization

Introduction

Being consistent with your information and writing style is essential to building trust with your proposals' evaluators and other readers. Two ways you can establish consistency in your proposals while also being efficient in your proposal development are:

- Having a proposal library
- Creating a writing style guide

A library of well-written, reusable proposal content—perhaps within a dedicated software tool—can make your organization more efficient at bidding. The ability to pull well-written content to address common topics or answer familiar questions can save time and ensure consistent and accurate answers across multiple proposals. A common problem with content libraries, however, is keeping the content up to date and ensuring that copied content remains relevant to the specific client and opportunity.

When building your content library, it's important that all your material follow a consistent style and voice. This way, no matter which pieces of content you pull from the library and drop into a proposal, the final product will read like something written by one organization and not multiple organizations. To achieve this consistency, make sure to establish, regularly update, and enforce a writing style guide.

Best Practices

Implementing a proposal library to increase quality and efficiency

Well-written, up-to-date content raises proposal quality and, thus, win rates. A content library also increases efficiency. Why scurry around looking for answers to frequently asked questions when they could be available at the touch of a button?

To maximize the benefit of your organization's library, create a system for capturing and managing content, supported by human and organizational resources. Key attributes include:

- Sponsorship from the highest level to ensure that subject matter experts genuinely take ownership of content
- A view of content management not as an administrative task but as a critical building block for success, led by a trained specialist who understands its value to the team
- Good planning and clear metrics to drive content development
- Content that is developed to the highest standard: well-written, strategically focused, and using contemporary design and graphics
- Peer review of all content before it is added to the library—using a process as robust as the one you would use on a must-win bid
- An individual or team with the right skills and organizational savvy dedicated to maintaining the knowledge base
- Constant updates to key material as your story evolves—not just tweaks when the system flags that it's time for an annual review

Including the right content

Initial content should be based on careful analysis of your customers' most frequently asked questions. Ask how often particular content has been used, and prioritize the content that you've used most often. Also ask if the content is successful: does it repeatedly appear in winning bids or losing bids?

Content libraries can contain all kinds of proposal-related material, such as:

- Answers to frequently asked questions that your customers demand in their RFPs

- Graphics you repeatedly use in your proposals
- Past performance documents that show you have a good track record of delivering the services you are regularly pitching to your customers
- CVs for the staff who deliver your services to your customers
- General information about your project governance, project management, products and services, and other areas that you need to describe in your proposals—including features, benefits, and discriminators of what you offer
- Example or template plans (delivery plan, proposal plan, opportunity/capture plan)
- Any other templates you use as a starting point for your proposals

Building the content library

Building a library takes time. Once you've identified what your customers are regularly asking, select the best versions of your responses. Then, carefully review that information and edit it in a way that will make it easy to identify and reuse.

As you build your library, consider where the information is held, so it can be accessed by those who need it. Security is key. Who should have access, and who shouldn't? Often, some of the information you need in your library will be confidential and require role-based access. This could mean you use one of the many proposal software tools available. Alternatively, many organizations use an internal SharePoint site (or other similar tool) or a simple shared network drive. All of these options work in certain environments.

Maintaining the library

Some content may be true boilerplate, but the best proposal-ready content supports editing and customization. The following table distinguishes types of content based on the degree to which they are typically tailored for an opportunity.

Type	Description	Best Practice
Locked	Change is prohibited (example: disclaimers).	Lock content with content controls, embedded PDFs, or images.
Generic	Usually used without change but still editable if needed.	Make content generic by removing customer-specific references.
Variable-Based	Content contains variables, such as customer or project names, that are updated when used.	Replace customer-specific references with easily updated placeholders.
Directed Editing	Content includes guidelines and instructions for modifications and inclusions.	Provide full lists that can be reduced, suggestions for tailoring content, links to external files, etc. Instructions should be easily seen and removed when finished.

Figure: Using different definitions of content to identify how to handle them in a content library

So that your content is proposal ready, make sure it's formatted consistently with your corporate branding and style guide. Use the correct colors, bullet styles, headings, table styles, paragraph alignment, and spacing.

Adapting content to suit your customer's requirements and instructions

As with all reusable content, some material must be adapted to the specific customer requirements or instructions (like word count). Generic, untailored content is obvious and runs the risk of appearing irrelevant or lazy to the customer. So always build time to review and edit the reused content to ensure it is relevant and specific to the customer's request and the story you are trying to tell. Think about what may need to be adjusted to address your strategy and your customer's needs:

- Basic details, such as names, places, dates, and times
- Language choice—mirroring customer language, using hot-button terminology
- Specific features, benefits, and discriminators

Creating a proposal writing style guide

Every word counts. High-quality and consistent writing will help promote your brand's strength and identity.

Your organization should establish a proposal writing style guide that helps writers follow the communication style that aligns with your brand. This includes visual and written elements working hand in hand to communicate—compellingly and coherently—what makes you different from (and better than) your competitors.

If all writers on the proposal follow your style guide, this will reduce the level of editing required. As well as aligning to your brand, the proposal writing guide should align to proposal writing best practices as described in the APMP Body of Knowledge, for example:

- Be clear, direct, and engaging
- Avoid jargon
- Be accessible and informative

Your style guide should establish rules for formality, such as whether you'll use contractions (e.g., don't, can't, we're). It should also help writers avoid typical spelling and grammar issues. This can be covered in subsections, including:

- Style and tone (keep it simple, personalized, and conversational; avoid tautology; make it active)
- Punctuation and grammar (e.g., possessives, capitalization, periods, bulleted lists, numbers)
- Spelling (commonly misspelled words in your company/industry)
- Commonly confused words (e.g., advice versus advise, principal versus principle)

Tailoring your style guide to each proposal

Your writing style guide becomes the starting point for bid-specific style guides. With each proposal, you'll need to adapt your style guide to suit the customer and show empathy. For example, your position on using a conversational tone may not always suit the customer, and you may want to adjust your approach for a specific opportunity.

Application in Diverse Environments

Large organizations with geographically disparate teams and customers in different countries may need to create content libraries in numerous languages. This requires more effort to maintain the library, including having strict change control processes.

In smaller organizations with only one Proposal Manager, managing the proposal library might be part of the Proposal Manager's role.

Common Pitfalls and Misconceptions

The biggest pitfall is not creating a library and writing style guide. The advantages of building a robust content library and standards for writing are often misunderstood, and these tasks are dropped down the to-do list.

Another common mistake is to build a library based on content copied verbatim from actual bids and then leaving it to the Proposal Manager to tailor that customer-specific content to an opportunity with a different customer. The timesaving benefits are lost, and the risk of error is increased.

The other common pitfall is investing time and money in creating a library and writing guide and then failing to keep them up to date. This quickly leads to a lack of confidence in the content, and writers might revert to reusing recent proposals.

Summary

Content libraries and writing guides will help writers create high-quality and consistent first drafts efficiently, leaving more time for customizing proposals. Strategic organizations have people with the role of ensuring that the right content is kept in the library and that the content is up to date and approved by the appropriate subject matter experts.

Proposal Managers and writers create writing style guides and adapt them for each proposal to help guide proposal contributors in developing good quality drafts.

Terms to Know

Proposal library: a set of reusable content pieces regularly used in an organization’s proposals, developed using writing best practices and organized so that people working on bids can easily access it and update it for use in specific proposals.

Proposal writing style guide: a set of standards and guidelines created to help proposal writers that establishes rules and defines commonly used terms.

Generally, teams asked to give oral proposals have made the shortlist, and the customer wants a preview of what it will be like to work with them. The customer might want to see how the contractor solves problems, as written in the proposal. Many times, they will conduct a question-and-answer (Q&A) session after the oral presentation.

Oral proposal team members have likely been hard at work on the written proposal and may be tired as a result. They might be tempted to relax and not prepare fully for the oral presentation.

However, if your team makes only an average oral presentation, you could lose the opportunity—putting your work on the written proposal to waste.

Companies often call upon proposal writers to support the development of scripts during this process. These writers should have an overall understanding of the oral presentation process and best practices.

Orals

Best Practices

1. Plan your approach before preparing your presentation.

Both oral and written proposals require careful planning before preparing the presentation or document. The team should:

- Identify time limits
- Understand the setting and occasion
- Analyze the bid request
- Create a compliance checklist
- Integrate the win strategy into the oral proposal
- Retain an orals coach

The Proposal Manager or other leader should facilitate the oral presentation. Before presenting, always conduct a final dress rehearsal with the entire team. By properly preparing and rehearsing the presentation, speakers can refine their persuasive message and develop the delivery skills needed to be successful.

2. Conduct oral proposal training with an orals coach.

Some teams try to prepare oral proposals without a coach. But would you develop a written proposal without a Proposal Manager? Of course not. Make sure to engage a qualified orals coach, either internal or external to your organization, to prepare your team.

Your orals coach should conduct formal training to bring your team up to speed. Although the team may consist of highly intelligent people, they may not be experts in oral presentations. Orals coaches can help proposal teams deliver the most effective and persuasive oral presentations possible.

3. Leverage an oral-proposal planner template.

Use a template to build a presentation that is logical, responsive, consistent, and persuasive. A template lends structure and logic to help you develop powerful presentations that are easy to follow and understand. Order your main points as specified in the bid request. If no instructions are provided, present main points in order of importance to the customer. Follow these steps to plan each major topic:

- Identify time allotted
- Review evaluation criteria
- Show how the strategy will be implemented
- Develop the introduction
- Develop content point by point using the Triple-S formula
- Summarize key benefits and discriminators
- Close with power (your value statement, sales message, or call to action)

The Triple-S formula

You can use the Triple-S formula to plan oral presentation content: state, support, and summarize each main point.

State

- First point
- Second point

Support

- Solution overview and description
- Key benefits
- Discriminating features
- Proven experience examples
- Awards, statistics, and recognition
- Impactful visuals
- Risk mitigation points

Summarize

- Conclude with value proposition

Introduction and conclusion

Your presentation's introduction and conclusion also require consideration and planning. Develop the core of the presentation first, and then create the introduction and summary. Introductions have both mandatory and optional functions. Mandatory functions include:

- Gain attention
- State the requirements/customer needs
- Summarize your value proposition
- Preview your main points

Optional functions within an introduction include:

- Establish credentials
- Define key terms
- Offer background
- Set the tone and establish rapport
- Introduce key program personnel

Like introductions, conclusions also have mandatory and optional components. Mandatory functions include:

- Review main points
- Restate the value proposition
- Close with power

Optional components include:

- Transition to the next speaker
- Address any questions the customer might have at that point in the presentation

Proposal writers may support the creation of scripts by working alongside presenters to ensure the agreed messages are delivered in the most articulate and consistent way. They can use content planning and development techniques to create scripts, while while also considering:

- How to achieve the right structure and flow
- The effects of recency and primacy effects
- Storytelling
- The impact of repetition
- How to use metaphors and analogies
- Comprehensibility
- How to validate strong claim passages or statements

All of this should combine seamlessly with the visuals that will accompany the words developed in your script.

4. Create effective visuals.

Carefully selected visuals have a powerful effect on evaluators (Figure 1). Visuals help readers remember key messages, particularly after a series of oral proposals presented in one mind-numbing day or several days apart.

With limited time and resources, use an organized process like one below to identify and incorporate appropriate graphics and other design options into your oral presentation:

- Identify customer pain points and how your solution will mitigate or overcome them. For example, dam electricity generation plants have problems with fish migration, which a fish ladder can overcome. A visual can show this more impactfully.
- Determine your key strategies and how you could graphically depict each.
- Review the evaluation criteria and major issues, then brainstorm which graphics tell compelling stories or offer proof of performance.
- Identify project risks and visually depict risk mitigation approaches.
- Use infographics to help present statistics and data.
- Consider showing the "today" view of the customer's situation and then a view of the future (e.g., existing customer site pre-construction and then the view of what the end result, post-construction, will look like).
- Explore potential options for animation and video to bring the oral presentation to life.
- Visualize ways to portray added value.

Make sure the oral proposal team rehearses with the visuals. Coach presenters to always speak to the audience, not the visual.

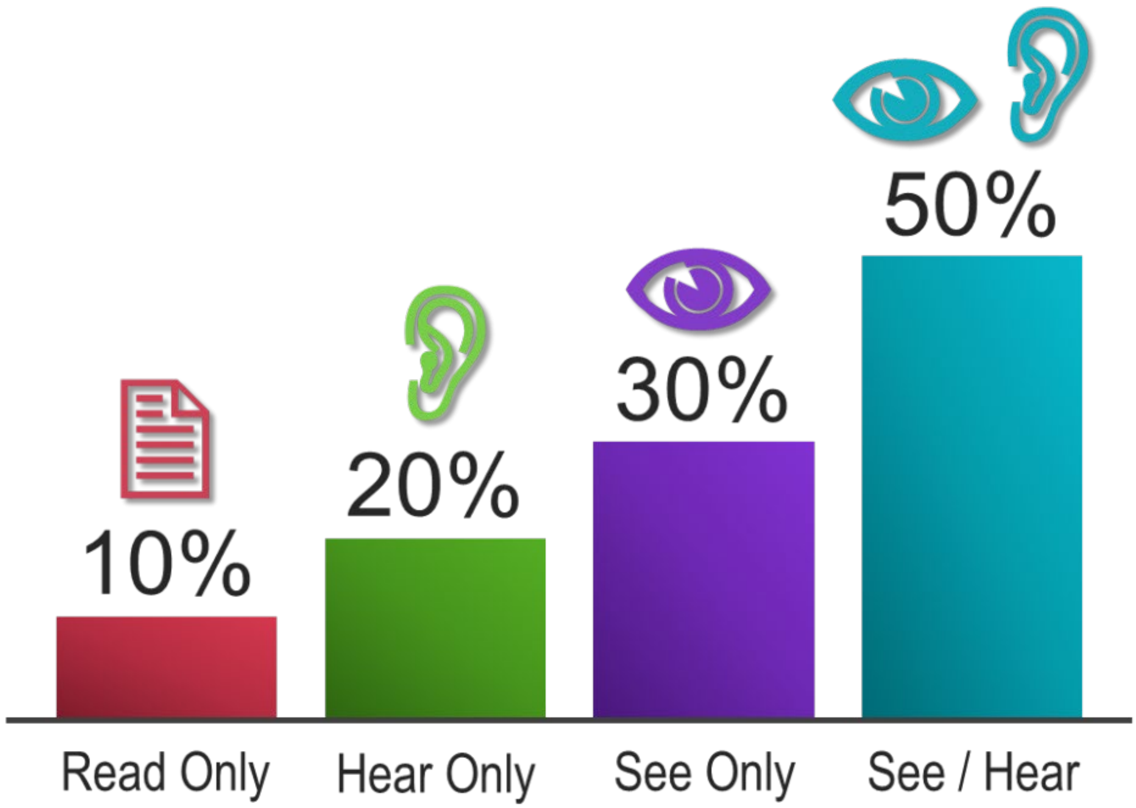


Figure 1. Retention of Visual and Verbal Information. *Effective visuals help evaluators understand and remember key messages presented in oral proposals*.

Use of video presentations

Some government customers are using video proposal presentations to assess vendors' capability to satisfy the requirements of the solicitation. Producing a video takes additional time and resources that need to be budgeted for during the planning phase. If you are not familiar with presentation media and their attributes and constraints, it may be in your best interest to seek professional resources that can help with the development and production.

5. Develop a winning delivery style.

A winning delivery style reinforces your verbal messages, as demonstrated in Figure 2.

Nonverbal messages can reinforce, replace, or contradict your verbal message. Your goal should be to control your nonverbal messages so they reinforce your verbal delivery. Ways to assess and improve nonverbal presentation skills include:

- Focus on eye contact, facial expressions, appearance and posture, movement and gestures, and voice projection and pauses
- Eliminate distracting movements, gestures, and monotone delivery
- Conduct video critiques for each speaker during rehearsals

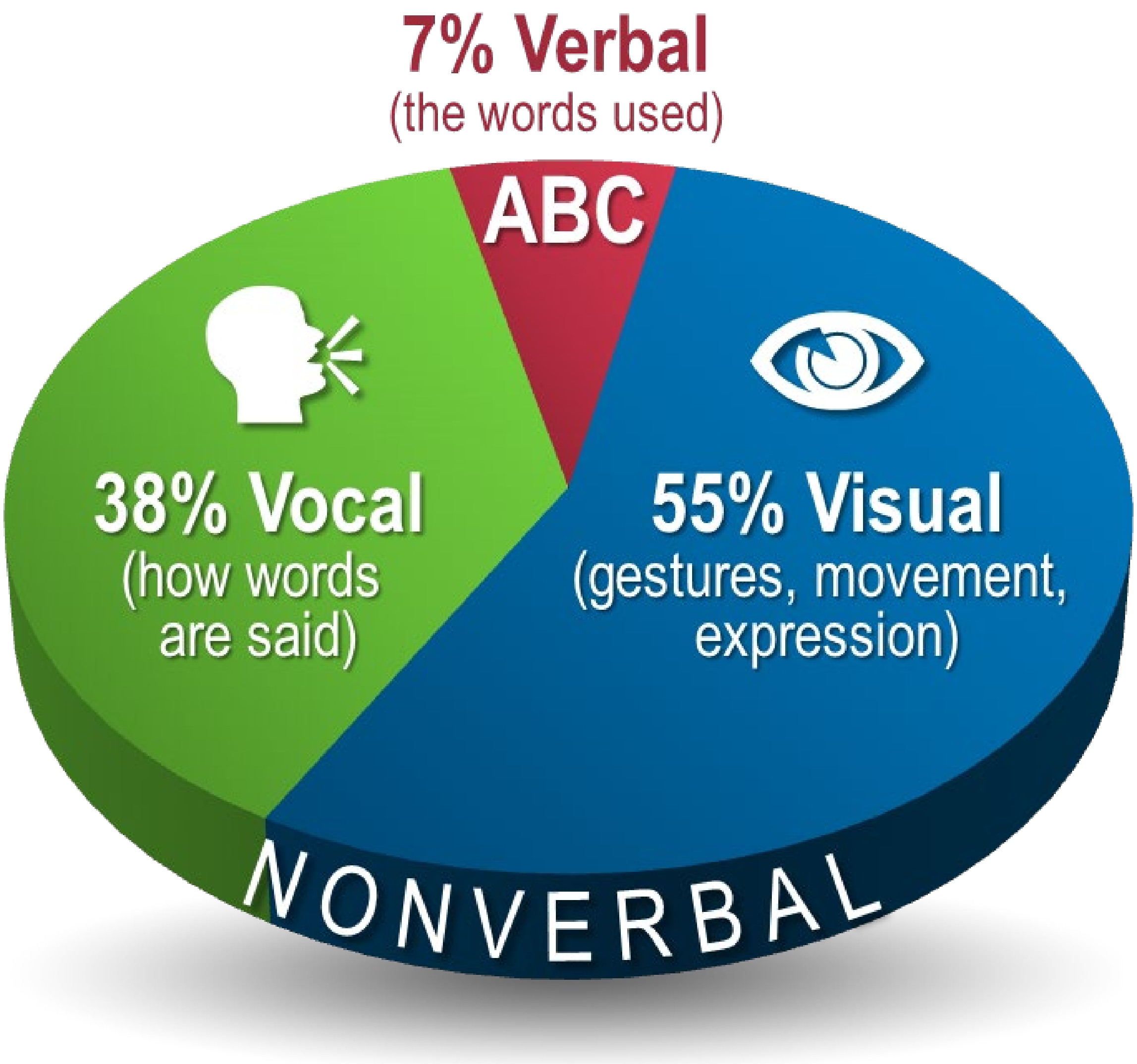


Figure 2. Importance of Nonverbal Communication. *Research by Dr. Albert Mehrabian at UCLA demonstrated that 93 percent of a message's emotional impact is conveyed nonverbally through visuals and vocal cues*.

6. Prepare for questions and answers.

While some oral proposals do not specify a question period, always assume this will be part of an oral presentation. Prepare for a Q&A session by:

- Knowing your materials
- Anticipating specific questions
- Brainstorming possible questions with the proposal team and technical experts
- Conducting multiple Q&A practice sessions
- Learning a consistent method to address questions.

Follow these guidelines:

- Respond to one question at a time.
- Listen carefully to the full question.
- Focus on the questioner:
  - Face the questioner.
  - Lean forward or move toward the questioner.
  - Establish eye contact.
  - Indicate active listening.
  - Do not interrupt.
  - Listen to the content (words) and for the question's intent (ultimate purpose).
  - If you do not know the answer, admit it or defer to someone else on your team.

7. Practice and rehearse.

Public speaking is a common fear, and members of proposal teams are sometimes reluctant to get up and present. A key danger for an oral proposal team is the lack of necessary practice and rehearsal.

Many sports coaches observe that players "play the way they practice." If your team has rehearsed your presentation in advance, you will increase your chances of success. Presenters should practice their presentation 10 to 15 times out loud to become effective. Follow these tips for presentation practice:

- Practice a presentation in individual parts and as a whole.
- Rehearse multiple times before an audience.
- Set a timer during each presentation.

- Conduct individual coaching sessions.
- Coach each speaker for message clarity, persuasiveness, and delivery skills.
- Digitally record each speaker to give feedback and improve skills quickly.

Application in Diverse Environments

Different presentation settings for small and large customers

The oral proposal requirements will be defined by your customer. Another variable to be aware of is the venue for your delivery. For a larger organization or a government agency, you may have a formal meeting room with a requirement to turn in your presentation materials so they can be displayed on your customer's equipment. For a smaller customer, you may be able to sit at a table and answer questions about your proposal.

Try to identify the venue and expectations for the presentation beforehand, then develop your materials and delivery style to match.

Recent Trends

Augmented reality and virtual reality

Recent augmented reality and virtual reality (AR/VR) technology has enabled presentations of a proposed solution to "come alive" for the client and allow an interactive virtual walkthrough of the project site. AR/VR presentations enable three-dimensional visualization with on-demand data recall and the ability for preliminary, real-time client feedback before the work begins. AR/VR comes at a premium, though, requiring ample time to develop and powerful computers to run the simulations. However, the benefits include having the client walk the project site from their office, showcasing the real-world "look and feel" of the proposed solution, and potentially expediting design approvals through an engaging and real-time feedback loop.

Photo-realistic rendering

Design drawings in presentations are ineffective as a visual medium, particularly when depicting changes in infrastructure, new construction, land development, environmental impacts, and community interests. Photo-realistic renderings allow the audience a means to "see" the final product. Imagine presenting a community center renovation with only a CAD drawing of the building changes. Now imagine presenting that same community center with visuals of children playing on the new grounds, the new building façade, people happily using the renewed community facilities, and new landscaping and recreation areas. A photo-realistic rendering is a cost-effective and powerful way to obtain buy-in and acceptance of the solution while keeping the presentation engaging and exciting.

3D printing

Some organizations are using 3D printing technology to create models and mock-ups of products or end-state representations of their solutions. Usually, this means engaging external providers, which requires additional time for planning and development.

Common Pitfalls and Misconceptions

Misunderstanding guidelines for oral proposals

Don't assume that the oral proposal is an opportunity to improve your solution and modify what was in your written proposal. If you are not allowed to update your solution, your customer may perceive you as being disorganized or dishonest in your presentation. Even if your solution or cost is improved, you must be sure you understand what you can and cannot do during the oral presentation.

Lack of preparation

Some teams try to "wing it" during the presentation and fail to prepare; indeed, don't fall into this trap. Plan and practice carefully to win.

Summary

- Oral proposals are like job interviews for your company, moving you from the short list of qualified vendors to the winner of a bid.
- Planning, professional coaching, and practice are the best ways to ensure a winning oral presentation.
- Effective visuals and nonverbal cues can help reinforce your verbal messages.

Tools and Templates

- Oral-Proposal-Planner (1).docx

See Also

- Graphics and Action Captions

Page and Document Design

The overall design and layout of your proposal documents is critical not just for communicating your information, but also for making an impression on reviewers and evaluators. Do your documents leave them interested and persuaded, or bored and unimpressed?

There are many important considerations to keep in mind when it comes to document design. For starters, documents must:

- Follow instructions or guidelines from your customer, your company, and/or your writing outline
- Be aesthetically appealing in an appropriate and professional way
- Use design techniques to highlight specific text and information
- Be produced efficiently using the tools and resources available

Stylistic choices must be made in consideration of any constraints and using a clear document template (defining elements such as color, font, page size, logo usage, and other details). This template should be established and communicated to your team so that all documents are compliant and consistent.

Your team must be empowered with the right tools and an understanding of appropriate metrics and milestones to effectively produce a professional document. They must also coordinate with writers and editors, graphic designers, and relevant physical production resources to ensure successful final completion.

Challenges with resources and technology will differ between small and large businesses as well as between co-located and dispersed teams. However, all teams benefit from being aware of emerging trends that can increase efficiency and change how reviewers interact with bid and proposal materials.

Best Practices

1. Understand the desktop publisher's role

A desktop publisher's primary role includes creating and implementing a document template that is compliant with instructions and applied consistently over all pages or files of a proposal submission.

A desktop publisher may also be required to insert, label, and number graphics within a document (often sequentially or by section); implement a list of figures and tables; and coordinate with editors, writers, and graphic designers to ensure consistent style. The desktop publisher may also interface with any physical production, including printing and creation of electronic files.

2. Choose the right tools

There are several options for document formatting software. Desktop publishers should be familiar with the tools that are most relevant in their industry and keep updated on new versions and new features of the software. Several software companies offer training for their products, as do third-party vendors. Many training resources are also available for free online.

3. Create a document template to ensure compliance and consistency

A document template can be created in many software programs. For maximum efficiency, however, ensure all members of a team are using the same software and same version.

A document template must first be compliant: It must follow all customer guidelines as provided and any corporate branding or style guidelines, as relevant. For instance, the customer may specify the paper size, the margins of the paper, the maximum number of pages allowed, and the font to be used. Do not stray from these requirements. In lieu of any specific requirements, refer to corporate branding or style guidelines. If none exist, reflect the standards seen most commonly in your industry.

Second, a document must be consistent. Consistency not only ensures information is presented in a way that reflects stated requirements, but also communicates your company's level of professionalism. Obvious changes in structure, color, font, imagery, layout, or other visual elements suggest a change in meaning. If those changes are unintentional and not clearly explained, the company bidding may appear unprofessional, unprepared, or lazy.

To achieve consistency and compliance, create a document template and provide it to all team members early in the proposal process. A document template includes (but is not limited to) the following items:

Final production information. Will the document be printed and bound or delivered electronically? This will inform the page size and orientation (such as American 8.5×11-inch portrait orientation or A3 landscape orientation), as well as potentially limit the amount or type of graphics or other design elements to be used.

Page margins. This includes margin width on all four sides of a document. Margins may differ depending on final production (such as having a larger interior margin to accommodate certain types of binding) or page orientation.

Column size and number. Pages can be separated into columns of text that exist between the margins. One column is the most common and easiest format to work with. However, to increase visual interest or to highlight different pieces of information, two or more columns may be used.

Formatting columns correctly and adding other visual elements (such as tables, callout boxes, or graphics) is typically a more advanced skill and may require additional training. Multiple columns can slightly increase the number of words included per page and can provide additional dynamic visual interest when successfully integrated with other elements.

Header and footer style. Headers and footers should be applied to the top and bottom, respectively, of every page in the document. These assist the evaluator in tracking the document, section, and page they are reviewing and may also include identifying markers such as company logo, name of proposal or bid, and submission date.

Font family or typeface. Specify font family or typeface using your software's type-style functionality.

You should further define how to treat the following types of textual information:

- *Body or "normal" text* – the majority of text-based information
- *Headings* – used to break up large blocks of body text, may be a different font family, different color, numbered according to document outline, or otherwise different to attract emphasis
- *Bulleted lists* – include the style of glyph used preceding every list, such as a small ball, square, or dash
- *Text you want to emphasize* – on a typical page of proposal text, the best way to emphasize a short word or phrase is by using boldface; other options include underlining and italics
- *Callouts or testimonials* – this may include design elements, such as a color or a box around text, to draw emphasis

Choose fonts based on instructions or style guides. When none are given, choose a common and legible font such as Arial, Times New Roman, Calibri, or Cambria. Use type no smaller than 10 or 12 pt (outside of graphics or tables, which may be as small as 8 pt).

Colors. Colors can be used in conjunction with design elements in the header and footer (such as a line), in tables, in headings, or other textual information. Chosen colors should be reflective of the end customer, a bidder's corporate branding, or a combination of the two.

Graphics styles. Specify how graphics are to be integrated with text. Generally, graphics are designed to physically fit within the margins or columns of the document, are sized for appropriate resolution (for print or online viewing), appear after they are referenced in the text, and are associated with an action caption.

Do not edit or resize graphics within the desktop publishing software if they are created in a separate program. If graphics are to be created within the desktop publishing software, other design elements may also need to be defined within the document template.

Special templates for individual sections. You may need special templates for sections such as Q&A sections, resumes, past performance/corporate experience, or the Executive Summary. Use tables to organize frequently referenced information (such as dates, project names, or staff titles). You can also use tables to provide an easy structure for concepts like question/answer, feature/benefit, and company/competitor, which can be used throughout documents in the bid or proposal.

Document templates should also be designed within the constraints of the desktop publisher's skill level, the available software to be used, and the time available to successfully produce a compliant and consistent document.

The desktop publisher should apply consistent file structure and maintenance, including version control of documents. The process for receiving, formatting, and returning documents to other members of the team, as well as instructions on how to implement the document template, should also be clearly defined and disseminated to the team.

4. Schedule effectively using metrics

Clearly schedule desktop publishing resources to ensure sufficient time to produce professional proposal or bid documents.

Documents may be formatted in parallel to writing/editing as long as they are separated by section or volume in a logical manner that does not impede progress or version/configuration control. For example, after Section 1 is written, it may be formatted while the writer turns his/her attention to Section 2. After Section 1 is formatted, it may be returned to the writer for final editing and then double-checked for formatting. This parallel system is ideal for large submissions. For smaller documents, formatting may be done in a serial fashion after all writing/editing is complete.

Formatting should align with major review cycles and may require reformatting or rechecking of formatting, particularly if electronic files are returned to writers/editors who may unintentionally introduce errors. Most desktop publishers, after creating a document template, can format roughly eight pages per hour.

Documents are often formatted several times throughout a proposal review cycle before final formatting, although some teams may prefer to only format once. Generally, the larger the document, the more times it should be reviewed and potentially formatted or reformatted. If you will be formatting more than once, include those iterations in your estimations to create an accurate understanding of how many hours are needed to complete the work.

Successful teams track productivity metrics over time and use those to develop tailored best practice timelines that can be included in their overall scheduling.

5. Prepare for production

The desktop publisher may be required to create print-ready documents for physical production and/or create final files for various methods of electronic delivery.

The most common format for printing and for electronic delivery, outside of specific desktop publishing software formats (such as .doc or .docx format) is a portable document format (PDF) file.

Every major desktop publishing software contains an option to create a PDF file; some have more advanced settings that are relevant to commercial printing. Creating a PDF file is effectively the same as physically printing a document (the software uses the same coding language, PostScript, that all printers use) and can be used to save printing costs and resources. It also "locks" or renders text, graphics, tables, and other elements unable to be changed easily, so that others cannot manipulate your information. This is valuable to ensure your document appears exactly as you intended, without unintentional (and possibly non-compliant) page breaks, color errors, or font substitutions.

PDF files can also be manipulated to decrease overall file size without the need to update every included graphics file individually. This is useful for uploading, emailing, or other electronic sharing methods that have file size limitations.

PDF files, in their most advanced state, have additional functionality that may be relevant for some bid or proposals. These features include security settings, easy-to-use forms, multimedia options, and the ability to hyperlink within and between documents. You will need a full version of Adobe Acrobat software to implement these features. Acrobat Reader software, however, is free, and has made PDF a ubiquitous file format for transferring documents.

6. Use graphic elements to create emphasis and guide readers

Beyond being consistent and compliant, proposals should be easy to understand and evaluate. Whether reviewing online or in a print format, all evaluators for languages that read left to right approach documents in a similar way. They begin interacting with a page at the top left and rapidly move down the page while scanning across. This top-down reading or viewing is interrupted by items that contrast with the rest of the page, including items that are colorful, are graphic or visual (like a table, callout box, or photo), are larger or smaller than the surrounding material, or are otherwise unusual to the layout.

These interruptions can be good. They draw attention to specific information and can be used to highlight points that readers might otherwise miss. Not including any elements that break up reading, on the other hand, can be detrimental. As in Sample B of Figure 1, all text-based information is given the same visual weight, regardless of level of importance. When this happens, key messages may be lost.

To increase the effectiveness of any page layout, put the most important item in the top left of the page and include at least one visual element.

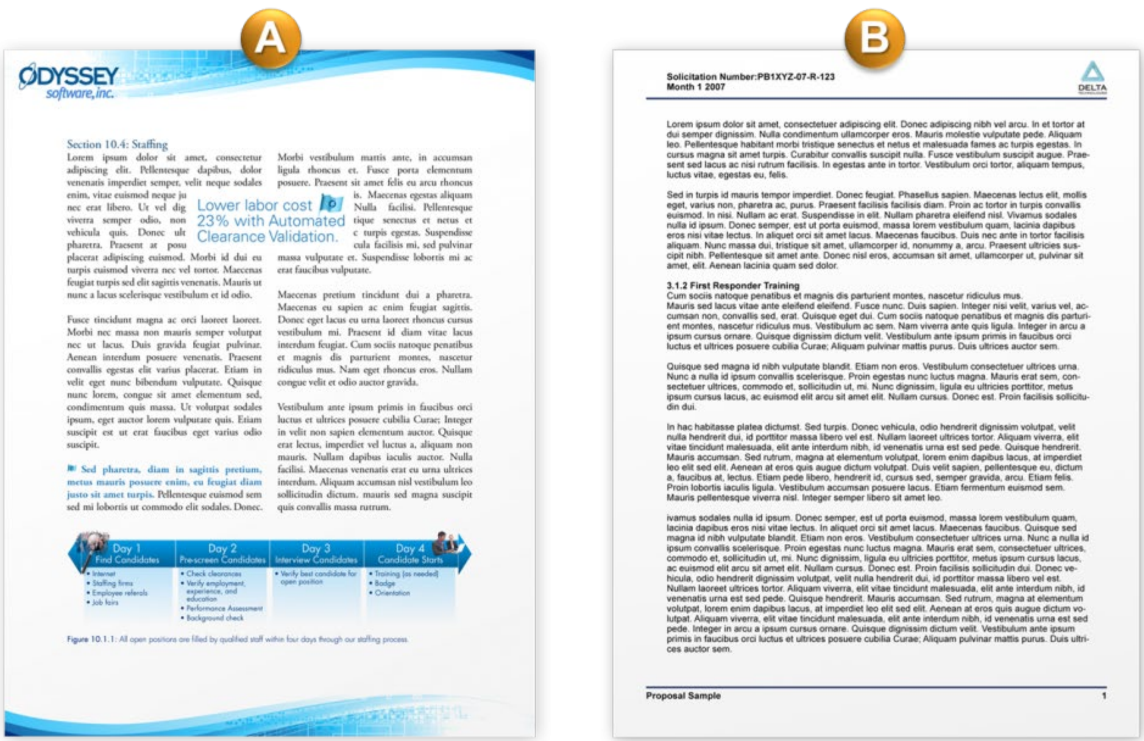


Figure 1. Using Visual Elements in Proposals. *Use visual elements, as in Sample A, to highlight information, break up dense text, and to encourage the reviewer to read more so that they do not lose or miss concepts, as they might in Sample B.*

7. Apply six design strategies to create effective layouts

- **Contrast** creates emphasis between visual items and can highlight or hide information. Create contrast with big and small elements, black and white text, squares and circles, and other binary/opposite pairings.
- **Proximity**, or physical/visual closeness, establishes a bond between elements on a page and helps readers understand when two or more concepts are related.
- **White** space gives pages breathing room and a "break" to readers. White space must be balanced with concerns regarding page limitations and may be decreased to include more text-based information or graphics.
- **Consistency** in use of design elements, font, color, and graphic/table styles helps evaluators navigate information more efficiently. It can aid in comprehension and signal information levels.
- **Balance** can be applied throughout the document layout and includes arranging elements on the page so that no one section is "heavier" than the other. Columns, graphics, tables, and other elements can be used to create balance. The placement of elements can also suggest a company's sensibility. A more innovative company may have a more visually imbalanced/dynamic layout, while a more established company may choose a static and balanced layout to further support their claims of stability.
- **Alignment**, or the relationships of parts of a page (text, headers, graphics, tables, etc.) to each other, can make a layout easier or more difficult to read and can influence readers' perceptions of written content. Desktop publishers may use other design elements, such as proximity, white space, balance, or contrast, to achieve alignment.

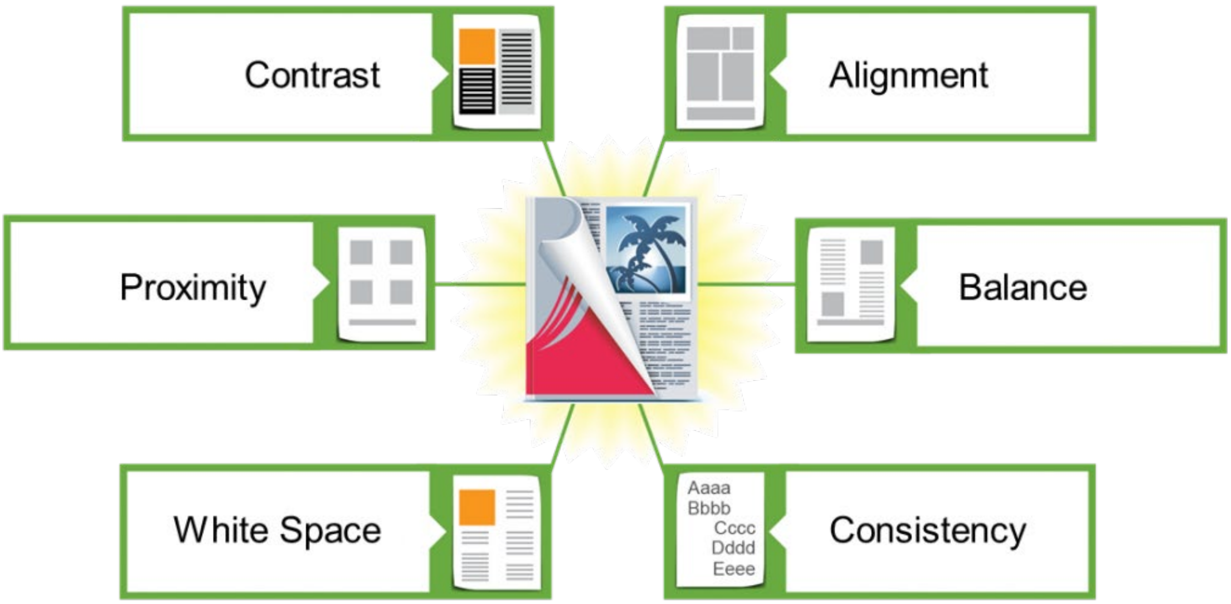


Figure 2. Six Design Strategies. *All six design elements can be used together to create a cohesive and engaging document*.

Recent Trends

The rise of responsive design

As digital publishing, e-readers, mobile devices, and responsive/interactive design gain popularity, some believe that traditional physical production and printing may become obsolete. This change affects traditional understanding of what size is appropriate for developing a document, what orientation (portrait versus landscape) is most user friendly, and challenges traditional concepts of effective design, including font choice.

In the cases of responsive or interactive design, developing for mobile platforms may increase the amount of time needed to develop documents. Responsive designs give users options for interacting with devices and content that move beyond the simple concept of a page. This may require teams to add skill sets, make new technology investments, or incur other costs or more development time.

Too much design, or too little?

With potential customers bombarded with thousands of branding images each day, it is increasingly difficult to stand out or to engage a reader skimming past a few key elements of a proposal or bid document. Images, color, graphics, and other visual elements are more critical than ever to document design and must be effectively integrated to engage reviewers.

Seemingly at odds with this rush to provide more intense visual experiences using technology, there is a parallel push to strip all design elements from competitive contracts and require submittal of plain text through web-based portals. This may, in some ways, provide a fairer competitive environment for all companies. However, this approach does not allow information to be highlighted or easily processed by reviewers, which could cause key messages to be lost.

Similar to this push is a growing concern about sustainability and the continued drive to eliminate paper-based responses in favor of more green options. These trends also have drawbacks and may limit design options, in persuasiveness as well as in cost.

Common Pitfalls and Misconceptions

Presumptions about staffing and resources

Some companies mistakenly assume that simply because a piece of software is present on employees' computers, their staff understand the software well enough to use it proficiently. This misunderstanding can prevent companies from giving staff the training they need to use software most effectively.

In addition, companies can grossly underestimate the time, techniques, and budgets necessary to produce a finished document, particularly if it is required in hardcopy format or in multiple delivery methods.

Inconsistency in document formatting

Documents that are created inconsistently or without a template are far less likely to succeed. Templates should be created by referencing best practices, customer requirements or preferences, corporate styles, other limitations (such as physical production or electronic-file sizes), and be clearly communicated to the team. This communication may include training to ensure use and to clarify expectations.

Summary

- Ensure your entire team understands that effective, consistent application of page design is critical for improving readability and understanding of information.
- Always schedule appropriate time for formatting and desktop publishing using metrics and based around major reviews.
- Develop a document template based on customer requirements and corporate brand standards with defined and repeatable processes/procedures early, and communicate templates clearly to your team.
- Train your team and stay up to date on software/application trends; don't expect teammates to understand how a piece of software works simply because it is on their computer.

Tools and Templates

- Page-and-Document-Design-Terms-to-Know.docx
- Standard-DTP-Template.docx

Further Study

- *Adobe InDesign CC Classroom in a Book, Kelly Kordes Anton and John Cruise. San Francisco: Adobe Press, 2014.*
- *Before and After Page Design, John McWade. San Francisco: Peachpit Press, 2003.*
- *Dynamics in Document Design (1st ed.), Karen Schriver. Hoboken: Wiley, 1996.*

- *Shipley Proposal Guide, Larry Newman, PPF. APMP. Kaysville, UT: Shipley Associates, 2011.*
- *Word 2013 For Dummies, Dan Gookin. Hoboken: Wiley, 2013.*
- http://us.fsc.org
- http://pneac.org
- http://www.adobe.com

Persuasion

The purpose of a proposal is both to inform and persuade. When making contract decisions, decision-makers rarely apply cold, hard logic and exclude all other considerations. Therefore, incorporating persuasive content and arguments within proposals is a key skill for those writing proposals. Many factors influence decision-making, including the content of a presentation, the relevancy of a product, and even a proposal's font. When it comes to writing and submitting a winning proposal, Proposal Writers and contributors must successfully apply the principles of influence.

These principles are more than theoretical. Research scientists have identified several key elements of persuasion that have useful applications in the business world.

Closely related to the topic of persuasion is that of persuasive writing. While persuasive writing is especially important in a written proposal, principles of persuasion apply throughout the sales and business development process.

Best Practices

1. Understand how central and peripheral processing affect decisionmaking

Scientists who study decision-making were once puzzled by an apparent contradiction: While better arguments are sometimes more persuasive, at other times, they backfire. Weaker proposals occasionally win over stronger ones. Why?

According to the *Elaboration Likelihood Model*, published in 1986, people tend to use one of two processes when making decisions. One, called central processing, is based on logic and sound arguments. This is the route that makes logical, rational sense. In this model, the decision-maker thinks through arguments carefully and evaluates all available evidence. Experts are more likely than novices to use central processing during high-stakes decisions.

Peripheral processing, however, is the key to understanding why logically weaker arguments sometimes win. Peripheral processing uses mental shortcuts and cues to quickly process and act on information. From a purely logical viewpoint, peripheral processing may seem inconsiderate or improper. However, scientists have demonstrated that in general, peripheral processing is much more common than central processing.

In the case of proposals, the widespread practice of immediately rejecting those that do not carefully follow instructions is an example of peripheral processing. For the decision maker, the lack of care serves as a quick cue to undesirability. This shortcut may be reliable in many cases but may also lead to the rejection of high-quality proposals.

Proposal readers use both central and peripheral processing in their decision-making processes. This is one reason proposal developers must understand their readers. If experts are going to evaluate the proposal, high-quality arguments will win.

But one or more nonexperts will likely evaluate a proposal during some part of the process. For these decision-makers, peripheral processing will play a major role. Therefore, it is important for Proposal Writers to be aware of how peripheral processing occurs. Keep this in mind, especially when writing an executive summary. Decision makers assessing a proposal at a high level often read executive summaries. Write executive summaries that support peripheral processing of information. Above all, consider the customer's needs and tailor proposal language accordingly.

2. Use the six Weapons of Influence to structure your argument effectively

In *Influence*: *Science and Practice,* Robert Cialdini reviews experiments that fall into six categories of persuasion. He calls these categories the Weapons of Influence. They are:

1. **Reciprocity** is captured with the old phrase, "You scratch my back, I'll scratch yours." Subtly reminding readers of something valuable they've received from a contractor can trigger a reciprocity reaction. For example, if a firm made concessions in a prior proposal, reminding the reader of these can trigger a feeling of indebtedness.
2. **Consistency** is a mental shortcut that encourages deciding in the same way as before. To the frustration of proposal developers, consistency exerts a strong pull on many decision-makers and votes often go to incumbents. Writers who are bidding as the incumbent should keep this principle in mind as they write. When trying to break in with a new lead, writers can highlight some key characteristics that the client identifies with. For example, "Selecting our firm, with its strong environmental track record, is consistent with your firm's demonstrated dedication to sound environmental practices".
3. **Social proof** is at play when decision-makers follow the lead of their colleagues or competitors. Social proof assumes that 'If it's good enough for him, it's good enough for me'. Proposers can establish social proof by describing past successes with similar or noteworthy clients.

4. **Liking** is often a salesperson's key strength. Science backs this up—people are more easily influenced by those they like. Sales and marketing techniques can help leverage this principle. By writing in a personal, relatable voice, Proposal Writers can further make themselves "likable" to potential clients. Another way to build liking is to reference the client's name frequently. Some Proposal Writers even use the client's logo and branding within the proposal.
5. **Authority** often comes into play when a nonexpert must decide about a complex issue. One reason many boards use consultants is that board members are aware of their status as nonexperts. They rely on those with authority to recommend the most suitable decision. Proposers can demonstrate authority by describing the credentials of team members, referencing awards and industry accolades, or providing testimonials from knowledgeable past clients.
6. **Scarcity** can be a strong emotional driver of decision-making. When a product or service is in short supply, people may become more likely to act. Scarcity underlies limited-time-only offers. However, people have strong negative reactions to false calls of scarcity. Furthermore, emphasizing scarcity should not be confused with an arrogant or overconfident "take it or leave it" message.

If a product has a limited distribution or availability, describing this can be an authentic tool of influence.

Application in Diverse Environment

Universal nature of principles of influence

Most persuasion researchers believe that the preceding principles of influence are virtually universal. As such, proposal developers can apply them in a variety of proposal settings. Fully understanding each principle gives proposal developers a set of tools to use in different settings based on the demands of a solicitation.

What situations are best suited to various tools? Use authentic tools of influence, such as liking and authority, to build the client's sense of relationship with a firm. Use valid, influential elements of the proposal, such as consistency and scarcity, to argue a case.

Recent Trends

The Internet's influence on information processing

One of the most important recent trends in marketing is the increased use and influence of the Internet. Many researchers believe that decision-making is becoming overwhelmed by information. While expert decision-makers will likely continue to seek out arguments to support their decisions, peripheral processing is likely to continue to play a significant role in many decisions. In fact, understanding and writing for peripheral processing may be even more important in the future.

Common Pitfalls and Misconceptions

Overuse of persuasive techniques

Writers shouldn't load proposals with all of the tools of influence they can find. In fact, if a customer feels manipulated or that the claims are dishonest, these tools can backfire. Evaluators look for authenticity. If they "smell a rat," other judgments or assumptions will come into play that will undermine the Proposal Writer's attempts to persuade.

What is the right amount of persuasion to use? A great first step is to be honest. Use elements that exist naturally in the situation. Companies should only be bidding on projects that are good fits for their capabilities. For this reason, they should be able to emphasize the qualities that they truly possess. For example, if a company really is the leading authority in its field, pointing that out will be honest and authentic—and persuasive to readers.

Summary

- People make decisions using either central processing or peripheral processing. Decisions made by central processing consider all available evidence before making a reasoned judgment. Decisions made by peripheral processing use mental shortcuts to quickly act on information.
- Social psychologist Robert Cialdini identified six Weapons of Influence that can be used to persuade. They are reciprocity, consistency, social proof, liking, authority, and scarcity.
- Mr. Cialdini's principles are thought to be nearly universal. Proposal Writers can use them to make proposals more persuasive.
- Writers should never misuse principles of influence. Use the principles to highlight true benefits, never to deceive.

Terms to Know

- Central Processing
- Peripheral Processing
- Principles of Influence

Persuasive Writing

Best Practices

The tools of argument used and documented thousands of years ago still work, and no proposal writer should be without them. However, you need to adapt these ancient tools to fit business professionals' practical needs. One way to do this is to couple them with new research in cognition and psychology. Follow these best practices to improve the persuasive power of your proposals.

1. Know your audience so you can use the right techniques to match their perspectives

A proposal is a written argument, not the one-sided, contentious bickering of politics, nor the assault on the senses of modern advertising. A proposal is the good kind of argument—an appeal to gain a reader's agreement, coupled with a call to partner with the author to solve that reader's problem. When you write a proposal, you are telling a story, and trying to convince your reader that:

- You thoroughly understand your reader's problem
- You have the best solution for that problem
- You want what's best for your reader

You do this through the craft of persuasive writing. Persuasive writing is:

- **Personal**. It focuses primarily on your reader's needs and preferences
- **About probabilities**. Someone else's solution might be appealing, but your goal is to convince your reader that your solution is more likely to succeed
- **Conclusive**. It leaves no doubt as to the best course of action

Proposal writing has a history of applying structural and linguistic modes of argument to win business. This article presents both traditional and recent best practices in persuasive writing techniques for Proposal Writers and Managers.

Persuasive writing is closely related to the topic of persuasion, which applies throughout the sales process. However, there are a number of strategies that proposal developers can apply specifically to their writing that result in stronger, more influential proposals.

While all writers should think about their audience before they write, persuasive writing is all about the audience. To write clearly, you have to make sure that every sentence relates to the subject. To write persuasively, you have to make sure that everything you say is filtered for your audience.

- **Be specific**. Even if you solved a similar problem for someone else, you still have to show how that success will translate to your audience's unique environment and situation. Do your homework to make sure your solution really fits. Don't spare the details; use real scenarios and precise statistics and measures to prove your solution is right.
- **Make it personal**. Discover what keeps your audience up at night and speculate on the corporate and personal repercussions of inaction or wrong action. The best way to build urgency in a proposal is to make your solution an alternative to real, personal pain.
- **Find common values**. To create empathy, your audience must see that you care about the same things they do. People like people who are similar to themselves, so understand their corporate and personal stances on business, social, and environmental issues to see if you have common ground.

This doesn't mean you should simply say what your audience wants to hear, however. A proposal is a precursor to a contract, so make sure you can deliver what you claim and that you really care about what you say you care about. Remember, a proposal is a true argument that aims for a mutually beneficial relationship—the classic "win-win" situation.

2. Apply the traditional rhetorical principles of argument

Sometimes old is good. Rhetorical principles were documented thousands of years ago and for the most part are still valid tools for Proposal Writers. Rhetoric provides basic techniques that Proposal Writers should consider.

Structure your proposal like an argument

For a Proposal Writer, the structure of a traditional, rhetoric-based argument is less valuable because a proposal has its own logical schema. But as you can see in the following table, a simple, unsolicited proposal structure still carries echoes of the original rhetorical structure of argument.

ARGUMENT STRUCTURE	PROPOSAL STRUCTURE
Introduction	**Executive Summary**
Informs audience of purpose, creates interest, explains approach, establishes credibility	Declares purpose, creates interest, forecasts approach, establishes credibility, summarizes offer
Statement of Fact	**Current Environment**

Sets background of the situation, describes context, explains current conditions	Identifies problem, demonstrates understanding of context, establishes needs/wants
Confirmation	**Recommendation**
States position, presents proofs, expresses value	States solution, validates solutions with proofs, describes benefits
Refutation	**Cost Proposal**
Addresses gaps, responds to contrary positions	Defines costs, expresses value
Conclusion	**Implementation**
Reinforces opinions, amplifies points, rouses emotion and urgency, summarizes	Reinforces solution and commitments, establishes timeline for delivery, allocates responsibilities, concludes

What does this mean for the modern Bid or Proposal Manager? Structure matters. Whether you assemble your proposal like a classic argument or not, your proposals will be more persuasive if you build them in a logical sequence.

The rhetorical structure makes perfect logical sense:

Introduce → State Facts → Prove → Refute → Conclude

And while many readers will inevitably go right to the **price**, one way of reinforcing the logic of your argument is to introduce your proposal sections with summaries that echo the preceding logical sequence. That way, at both a macro and micro level, you'll be leveraging thousands of years of conditioning in your audience. Here's how that might work in your pricing section:

- **Paragraph 1** – **Reintroduce** your proposal's main idea, slanting it toward the financial value that you will explain in detail
- **Paragraph 2** – **Restate** the reader's needs and your benefits in summary form; perhaps in a table or bulleted list. Present each in the same order you used in the earlier sections. Anticipate the financial benefit for each tactical benefit
- **Paragraph 3** – **State** your complete costs as simply and directly as possible. Make sure you follow your customer's requirements if provided. Present the bottom line here and refer to supporting details (line-by-line prices) in a pricing attachment
- **Paragraph 4** – **Prove** your value by showing the total cost of ownership, return on investment, payback period, or other analytical methods (depict in the graphical form if possible)

- **Paragraph 5** – **Refute** any of your reader's objections to your price, your rationale, or your approach
- **Paragraph 6** – **Conclude** your pricing section by summarizing the overall value of your solution or demonstrating the added value your solution offers beyond mere price

Common rhetorical tools used by the modern Bid or Proposal Manager are the modes of persuasion of logos, pathos, and ethos, or, in today's language, logic, emotion, and credibility. While not always referred to buy their ancient terminology, these three arguments should be present in any persuasive proposal.

Establish the validity of your proposal with logic

In proposals, you state claims and provide proofs to support them. This is the most intellectually satisfying of persuasive techniques. The more objective your proofs are, the more compelling your argument is. Proofs take many forms, ranging from the definitive:

- Technical specifications
- Test results
- Certifications
- Adherence to standards

to the more anecdotal:

- Evidence of past performance
- Testimonies of satisfied customers
- Citations of awards and recognitions

To persuade, you must follow every claim with a proof and show how that proof will apply in your reader's world.

Appeal to the emotions of your audience

If you truly understand your readers, then you know that they are people of passion as well as of intellect. Although some don't like to admit it, people make decisions as much on emotion as they do on logic. A time-tested persuasive technique is to express how inaction or the wrong action can jeopardize your reader's well-being. This is known as the "FUD factor" (fear, uncertainty, and doubt).

This is where storytelling techniques can be of greatest value in a proposal (see Writing Clearly). Telling a story about what might cause an outage or interruption to your reader's business is a great way to bring awareness to a problem and its potential consequences—and a way to bring urgency to a decision.

Another technique for eliciting an emotional response from readers is to use vivid language. Again, understanding your audience is crucial for knowing what degree of vividness to apply. You can bring vividness to your writing by using:

- **Common words over their formal equivalents**. Informal equivalents are often more emotionally charged, like belly or gut instead of abdomen. Others are simply easier to read, more direct, and have lesser emotional value, like car versus automobile. Beware, however, that the more emotionally charged word may call your ethics into question. For proposals, taking an emotional middle ground with your tone by using less emotionally charged words most of the time. This will draw attention to the periodic use of more vivid, emotionally packed words and elicit a stronger response.
- **Concrete words instead of abstract terms**. Language is vivid when it conjures an image in our minds. Concrete words (carpenter, endocrinologist) are faster to read and easier to understand than abstract equivalents (worker, doctor). As a writer, you may have vivid images in your head as you describe the workings of process, but if you don't use words that accurately describe what you see, your readers won't see things as you do.

Some words are value-laden in themselves. Using them in your proposals can either align your message with the values of your readers or build value gaps. Two examples of value-laden words are conservative and liberal. These words are emotionally charged across the spectrum of topics, from politics to religion to finance and beyond. Use them, and words like them, carefully.

Express an ethical character

A final persuasive technique from the rhetorical tradition is known as the ethical appeal. This means forging mutual respect with the audience by encapsulating your logical and emotional appeals with sincerity and honesty. Like knives and guns, techniques of persuasion are neutral, neither bad nor good. It's all in how you apply them. You can gain your reader's confidence and convey your strong ethics by:

- Avoiding fallacies as you present your logical proofs
- Acknowledging but not exploiting weaknesses
- Admitting issues in the past, but explaining how they were resolved
- Showing empathy for people that might be affected negatively by your solution
- Expressing concern for the environment and a bias for sustainability

Using the ethical appeal provides added substance behind your argument and indicates that both sides will benefit through an agreement.

3. Anticipate your readers' questions so you can remove reasons for rejection

Some proposals are rejected because the writer makes it easy for the reader to say "no". Your job as a persuasive writer is to remove all the roadblocks to "yes." You can do this by anticipating every point at which your reader may become uncomfortable, skeptical, or fearful. To do that, you have to ask yourself the same questions your reader will ask you, such as:

- How will this work in my world? *Your staging facility is great, but I'm unique.*
- Who will do what work? *And why can you do it better than I could myself?*
- How much will it cost? *And how much will I save, now and in the future?*
- How can I pay for it? *And can I actually make money from it?*
- Why should I do this now? *Right now, instead of another time?*
- How have you done this before? *Have you done it for someone as individual as I am?*
- Why shouldn't I stay with the incumbent ? *Why can you do better than they have?*
- How will you stay on schedule and budget? *And how will you address scope creep if it happens?*

Be specific with your responses to these questions. Details persuade; generalizations come off as hedges at best and smokescreens at worst. Don't write: "Some workers will realize productivity gains." Instead, write: "Your 28 support staff clerks will reduce their filing and follow-up time by an average of 18 percent, or 1.8 hours per day."

4. Apply Cialdini's Weapons of Influence to hone your arguments with lessons from modern behavioral science

Recently, persuasion has given way to a new term: influence. Blogger Nicole de Falco defines the difference between the two terms:

"*Persuasion* is presenting a case in such a way as to sway the opinion of others, make people believe certain information, or motivate a decision. *Influence* is having a vision of the optimum outcome for a situation or organization and then, without using force or coercion, motivating people to work together toward making the vision a reality."

While Proposal Writers should write to persuade, they should also attempt to influence their readers. Proposals should describe a vision of optimum outcomes achieved in partnership with the customer.

This is why the research of Dr. Robert Cialdini is important to Proposal Writers. Dr. Cialdini has spent 30 years understanding why people make the decisions they do. His six principles, the result of research in human behavior, describe techniques that take the traditional persuasive techniques just described a step or two further. The table below lists and defines the techniques, known collectively as *Weapons of Influence*, and explains how you can use them in proposals.

TECHNIQUE	DEFINITION	PROPOSAL EXAMPLE
Reciprocity	Give something to your audience first, knowing their tendency to act in kind. How you give is important. The more personalized and unexpected the gift, the more effective it will be.	Refer to any free studies or analyses you have performed to get your customer to the point of purchase. Cite examples of free trials or beta versions given to your customer.
Scarcity	The scarcer something is, the greater its value. The value of its benefits and the uniqueness of those benefits are keys to success.	Emphasize the unique benefits of your products and services. Ghost your competition by pointing out clearly what you deliver that they don't.
Authority	Get credible, knowledgeable experts to substantiate your claims. For best effect, be introduced by or cite someone with credentials before you make your argument.	Gather or solicit positive reviews and testimonies for your projects and products. Cite awards prominently in your summaries.
Consistency	Ask for small, initial commitments before you ask readers to take another, bigger risk. This reinforces the strategy of gaining quick, small wins to set the stage for major initiatives.	Propose a trial at an individual site before implementing across an enterprise. Create a staged implementation plan to reduce risk across the enterprise.
Liking	People say "yes" more often to people they like, to those who cooperate, and to those who are more like themselves. Find and state similarities you share before making your argument.	Leverage your relationships with the customer and their influencers. Remain customer-centric by assuming their voice and terminology. Drop names of people who have delivered good service to a customer.
Social Proof	When others do something, it makes it easier for us to follow. Capitalize on the herd mentality.	Provide examples of how other companies in your customer's industry have adopted your solution.

Research continues on Cialdini's principles. He and his colleagues Noah Goldstein and Steve Martin have identified 50 persuasive tactics that can improve your chances to win, plus some insights into how persuasive tactics vary across cultures. Note these scientifically supported highlights from this work:

- "When people are uncertain about a course of action, they tend to look outside themselves and to other people around them to guide their decisions and actions." You could provide examples of others who struggled similarly with buying decisions but came out ahead by choosing your solution.
- "Anyone who has a range of products or services to offer could make midrange products more popular by offering more expensive ones first." You could offer your high-end products at a summary level before extolling the virtues and lower costs of your midrange products within an alternative recommendation.
- "The labeling technique involves assigning a trait, attitude, belief, or other labels to a person, and then making a request of that person consistent with that label." You might classify your decision-makers as astute business leaders based on public records of winning strategies and decisions, then connect that success to future success with your solution.
- "Arguing against your self-interest, which can include mentioning a drawback of your arguments, proposals, or products, creates the perception that you and your organization are honest and trustworthy." You could directly address a prior failure and show how you have rectified the problem and actually improved service from that experience.

While none of these are exclusive to proposal writing, they can supplement your persuasive strategies and tactics for your proposals.

5. Use graphics and multimedia to immerse your audience in the potential of your solution

Graphics are powerful tools for persuading audiences. Graphic design influences:

- **Credibility**. People equate visual design with professionalism
- **Receptivity**. We tend to absorb main points faster when viewing images versus text
- **Stickiness**. We recall information more readily when presented with images
- **Responsiveness**. Images trigger emotional responses better than words

A variety of design strategies can improve the persuasiveness of your proposals. Color, content-revealing graphic layouts, informative graphs, and meaningful illustrations. Creating a comprehensive visual strategy that reinforces and enhances your textual messages is a key way to ensure your reader sticks with your narrative and your narrative sticks in their minds.

And this is just regarding print output. Providing product or service demonstrations delivers more tangible proof than mere words. As a result, multimedia presentations of process and product simulations increase persuasiveness even more.

There's no excuse—other than strict customer RFP requirements—for not leveraging modern video, animation, and simulation technologies as inserts into multimedia proposals.

Application in Diverse Environments

Some of these persuasive techniques (especially the rhetorical and visual principles) are universal; some, like the social media-based techniques, will require your careful consideration before you apply them in certain industries and especially in government procurements. Always understand and follow your customer's guidance, but also be on the lookout for opportunities to open your persuasive toolkit and try new approaches.

Cialdini and his colleagues say that there are some subtle "variations in the cultural norms and traditions of diverse societies, which leads the people of these different societies to place greater weight on some aspects of a persuasive message than others." With this in mind, you should adjust your tactics and your messages based on the cultural background of the person to whom you're sending a proposal.

Here's an example of one significant cultural difference. People in the United States, the United Kingdom, and Western Europe tend to be more individualistic, while people in many other regions, including Asia, South America, Africa, and Eastern Europe, tend to be more collectivistic. So when writing to readers in collectivistic locales, you'll probably be more persuasive if you write your benefits according to their value to the group as opposed to an individual consumer.

Remember that while relationships are key to the persuasion process in any culture, they are especially crucial with people from collectivist cultures.

Recent Trends

Applying persuasion techniques used on social media

Social media may be relatively new, but the techniques of persuasion used on social media platforms aren't. Think about how you are influenced by your friends, colleagues, and relatives on one of these platforms. You'll find that they share four key persuasive characteristics:

Brief: You can't bore anyone on Twitter. Your comment must be brief, to the point, and valuable. To get someone to follow you, you have to add value in digestible, 280-character-long chunks, time and again.

Takeaway: If we can't do our business using Patrick G. Riley's One-Page Proposal technique, we will still improve our persuasive appeal if each element of our proposal is as concise and direct as possible.

Personal: On social media, you're communicating with a wide array of people who have at least one thing in common: you. When you "like" a friend's post or a friend comments on yours, you are demonstrating one of Cialdini's principles. When others outside your circle of friends comment or "like" your posts, you are witnessing the power of affinity.

Takeaway: We can gain decisionmakers' attention and then their trust by showing your connections with people or companies they know and respect. Learn as much as you can about the individuals who will read your proposals—their backgrounds, their business accomplishments, and even their favorite social causes. This will help you build a strategic persona in your proposal that fits their personality and interests.

Constant: Social media platforms are always on. That doesn't mean their users always are, but you always have access to those users when you need them or want them. And most platforms find a way to notify users that someone has a message for them. Being there—present and available—builds trust, and trust is a key condition for persuasion.

Takeaway: Dr. David Pugh advocated the "living executive summary" for many years—a consistent, repetitive communication between the sellers and decisionmakers. You tailor it to meet the personal information needs of decisionmakers and prepare them for upcoming engagements. You can set up and deliver this type of constant communication now more easily than ever: via email, websites, and private media channels.

Free: Social media have their influence agents—people who create expertise and then give it away, knowing that the principle of reciprocity will then go to work.

Takeaway: You can do something similar as you develop proposal information. The research you do can yield insights into other aspects of a potential customer's business. Some internally created tool, macro, or document might fit a need you uncover in the proposal. Creating an added-value section of your proposal for these "no-strings-attached" bonuses can help create a persuasive edge.

Common Pitfalls and Misconceptions

Importance of asking for what you want

The only "must-use" persuasive technique in a proposal is the one that many leave out: asking for what they want. Whether it is someone's business, someone's money, someone's time, or someone's help, you have to overtly ask for it.

Persuasion is the work you have to do to improve the chances that the answer is "yes." But all the persuasive techniques in the world won't work if you don't ask.

"No" is the end

An answer of "no" may be the end of your chances for a current piece of business, but what you learn about the reader and your persuasive and operational abilities will provide you another chance for "yes" down the road. At least "no" has a resolution. "We'll think about it" and "maybe" are true dead ends, because you don't know what went wrong. Was it the solution? Was it your writing? Was it the salesperson? With a clear "no," you can pursue finding out the reasons why and make progress.

Summary

- Persuasive writing is completely about the reader. Craft every strategy, theme, section, and line with the reader in mind.
- Rely on the classic techniques of persuasion and adapt and enhance them using research in human behavior.
- Innovatively apply sound graphical design and multimedia technologies to persuade tech- and media-savvy audiences.
- Adapt your use of persuasive techniques to match the cultural backgrounds of your audiences.

Terms to Know

- Principles of Influence
- Rhetoric

Tools and Templates

- [Persuasive-Writing-Checklist.docx]

Proactive Proposals

A proactive proposal is generated after an informal discussion with a customer, such as a sales visit or phone call, during which an unmet customer requirement is discovered. More precisely, while a proactive proposal is not formally solicited, key influencers are interested and ideally become "coaches," advising as you prepare your proposal.

Proactive proposals might be disguised as white papers, analyses, studies, or recommendations. The focus and organization of proactive proposals is similar to letter proposals or executive summaries within formally solicited proposals. Other terms for a proactive proposal are unsolicited proposal, sales proposal, commercial proposal, and sales letter.

Aristotle noted three elements of persuasive arguments: logos, ethos, and pathos. You can address three similar fundamental elements of Persuasive Writing in your proactive proposals:

- What is the potential benefit to the customer? (*Logos, the logical element*)
- Does the customer connect with our organization and services? (*Ethos, the emotional element*)
- Can the customer trust us? *(Pathos, the reputation and proof element)*

Best Practices

1. Organize according to the customer's hot-button issues.

If your customer asks you to organize your proposal in a particular way, you should always comply. Noncompliance shows a careless, arrogant tone.

However, if the customer does not request a particular structure, then organize your proposal into three parts:

I. Summarize your proposal in your executive summary.

Begin with an executive summary. The executive summary provides an overview of the offer and highlights the key selling points for decision-makers. It articulates the customer's vision and presents win themes and win strategies that substantiate "why us." It may be a separate section fronting the proposal or may be included in the cover letter accompanying the proposal.

Within your executive summary, state your objective, explain how your objective will benefit their organization, and link your objective to the most important discriminating features of your solution. They'll give your proposal more consideration if the perceived value of your services and products exceeds the cost of those services and products.

Limit your executive summary to between five percent and 10 percent of the entire proposal.

II. Preview the organization of your proactive proposal.

Since customers care about their hot-button issues or motivators, organize your proposal in the order of importance of their hot buttons. Use the customer's words or phrasing when naming hot-button issues. Create a preview in the form of an introduction or table of contents.

III. Explain your solution in the body of your proposal.

Align each major element of your solution against one of the hot-button issues. Once complete, you should have described your entire solution. If an aspect of your solution does not align with, support, or address one of the customer's hot-button issues, consider not mentioning that aspect of your solution.

Make sure to follow the pattern you established in step two. If you introduced three hot-button issues in your preview, then address those same three issues in the same order. Repeat the exact wording of each hot-button issue in subheadings.

The solution you propose should be brief but comprehensive. It should describe the following aspects of your solution, if pertinent:

- What are the customer's requirements that you've built your solution on?
- What did you consider when building your solution? (For example, did you consider alternatives before proposing your recommended solution?)
- How did you design your solution? Is it based on a proven technology or a new method you've developed?
- What services and products will you deliver?
- Who will direct and manage the delivery? Who is responsible?
- What is the delivery schedule?
- What is the cost, both in total and step by step?
- What evidence can you offer to support your claims? Include examples of where you've delivered it to similar customers and the benefits they realized because of it.
- What return on investment can you provide? Can you show this in the proposal?
- What are the risks, and how will they be managed?

2. Confirm customer interest in your solution

Preparing and submitting an unsolicited proposal has about the same probability of success as a mass or bulk mailing—near zero. However, a proactive proposal might be a best practice under the following conditions:

- One or more individuals in the customer organization have expressed interest in such a proposal, especially a proposal from your organization

- You have identified and ideally confirmed this customer's hot-button issues and the value of addressing those issues to their organization, influencers, and decision-makers.
- You have a solution that they will likely value.
- The immediate value of obtaining a prompt solution outweighs the cost of soliciting solutions from others and the potential savings resulting from a competition
- This customer's purchasing guidelines permit awards without a competition
- Your proactive proposal is likely to improve your win probability on subsequent bid

3. Determine your objective and design your proposal around achieving it

Your overarching objective is to advance a sale. But to develop the most effective proactive proposal possible, you must define your objective more precisely. Do you want to convince this customer to agree to a subsequent meeting? To influence their purchasing process? To issue or not issue a bid request? To enter negotiations without further competition? To issue a purchase order? Your specific objective will determine how you approach the development of your proactive proposal.

If your objective is to persuade this customer to forgo competitive bidding, then focus on the opportunity cost of delayed implementation. If your objective is to persuade this customer to meet, then proposing a complete solution is premature.

4. Use graphics with action captions to differentiate your proposal

Graphics are one of the most effective and efficient ways to convey persuasive information. Effective graphics convey facts and emotion, which are important elements of persuasion. Considering the informally solicited nature of most proactive proposals, busy readers will scan and then read further if something captures their interest. Appealing graphics with clear action captions are more memorable than prose.

Strive to explain why your proposition should be selected using both text and visuals. Avoid repeating visual information in body text. For example, when presenting the delivery team organization in a chart, avoid noting obvious reporting relationships in body text or the action caption. Instead, explain why a relationship exists, perhaps linked to relevant experience.

Include an action caption with every graphic. Action captions interpret or explain graphics. They are composed of three parts:

- Figure number
- Informative heading
- Complete sentence(s) explaining the relevance of the graphic to the evaluator, linking benefits to features

5. Limit attached or appended materials

Attached information dilutes your message and discourages readers from confronting what appears to be a large document. Appended materials of limited interest waste your preparation time and your customer's reading time.

Instead, list additional materials that are available and explain how they can be viewed or obtained. Customers increasingly research potential solutions, vendors, and trends via multiple channels. In fact, they may prefer to learn about your solution from a source other than your organization's professional sales representative.

Application in Diverse Environments

Higher prevalence in smaller procurement settings

Proactive proposals are most applicable in environments lacking formal purchasing guidelines, typically business-to-business (B2B), smaller governments, nonprofits, and other smaller procurements.

When major procurements are involved, in both government and B2B environments, proactive proposals are often termed white papers.

Practitioners of formal sales disciplines urge sales professionals to submit proactive proposals to avoid formal competitions. Unfortunately, purchasing guidelines and formal regulations increasingly bar such practices.

Recent Trends

Decline of proactive proposals in government environments

Unless disguised as white papers, proactive proposals are increasingly rare in sophisticated government purchasing environments. Even when the purchasing situation might be biased, authorities often prefer to maintain the appearance of fair and open competition.

As governments in developing countries seek to develop fair and open competitions, proactive proposals tend to be viewed unfavorably unless disguised as a white paper, study, or recommendation.

Common Pitfalls and Misconceptions

- Submitting proactive proposals as an excuse to avoid preparing compliant proposals that follow bid-request instructions
- Submitting seller-focused documents, little more than slightly customized sales brochures
- Using proactive proposals as an excuse to submit descriptions of every service and product you offer
- Submitting proactive proposals as a best practice justified by your organization's preferred sales discipline

Summary

- Confirm a customer's interest before determining whether to prepare and submit a proactive proposal.
- Limit your proposal to the content necessary to advance this sale.
- Adopt a customer-focused document organization, either as requested or according to the customer's hot-button issues.
- Use graphics with action captions to convey persuasive information efficiently and effectively.
- If content does not directly support of your objective, eliminate it, either reserving it for a subsequent client request or noting where customers can access supporting material at their convenience.

Terms to Know

- Action Caption
- Benefit
- Compliant versus Responsive
- Customer Issues
- Feature
- Graphics
- Hot Buttons
- Informative Heading
- Persuasive Writing
- Proactive Proposal

Tools and Templates

- Four-Box-Template.docx

Proof Points

Proof points are facts that provide verifiable evidence for your solution's features and benefits. They support your company's win themes and discriminators. Without proof points, proposal evaluators may question whether features are proven, and benefits are achievable. Proof points make your proposal compelling and credible.

Proof points often describe performance evidence on similar past efforts. They can be project data, performance data on similar contracts, case studies, success stories, customer quotes or testimonials, awards or recognition, and more. They can also be examples of where you have overcome a challenge with an existing customer. Evidence of meeting an issue head-on and turning an unhappy client situation into a long-term, mutually beneficial relationship can be very powerful.

Crafting effective proof points requires you to understand the win strategy before the RFP is released. This will help you conduct preliminary data calls to gather information. After the RFP is released—when you know the requirements and have a refined win strategy—you can conduct more data calls to gather additional evidence for credibility, persuasion, and compliance.

Proposal writers should have access to proof points to incorporate them into the areas of the proposal they are developing.

Best Practices

1. Understand your win strategy and corresponding win themes.

Your win strategy is the collection of plans and actions you develop after you decide to pursue an opportunity.

A win strategy includes win themes. Effective win themes contain a benefit, feature, and corresponding proof point(s)/evidence. Proof points deliver evidence that gives the customer confidence that you can provide the feature and corresponding benefit(s) you promise. Without proof points, the proposal evaluator may identify weaknesses in your solution and perceive risks to successful performance.

The Bid or Proposal Manager should partner with the Opportunity/Capture Manager to understand the win strategy and the proof points you need. The Opportunity/Capture Manager should provide the following information:

- What are the customer's hot buttons?
- What features and benefits are you proposing in response?
- What evidence can you present to best discriminate your bid from the competition?
- What capabilities and evidence do the teaming partners bring to the table to fill any gaps?

Past proposals and customer debriefs are other sources of good proof point information. Critically assess them to determine which proof points were most compelling. Often, customer debriefs offer clues as to which evidence helped convince the proposal evaluators of your proposal strengths, as well as which proof points (or lack thereof) contributed to perceived weaknesses or risks.

Customer kudos and contractor performance assessments are often among the most valuable proof points to share with a potential or incumbent customer. They are voluntary, unbiased assessments of contractor performance. There is no incentive to artificially enhance a contractor assessment and certainly no incentive to write a kudo when there has not been exceptional performance.

Everyone experiences occasional undesired outcomes. In the event of a negative performance assessment or an inadequate contractor response to a situation that puts the customer at risk, the contractor's response is what counts, not that the negative event occurred. A timely response that addresses the problem satisfactorily and a concurring statement from the customer may reflect more positively on a contractor than no negative reports and resultant corrective actions.

2. Get started before you have an RFP.

Once you understand the win strategy, build a store of proof points that will help tell your story. Try to balance the types of proof points you collect so they are not all the same type (e.g., testimonials). Think about which proof points best convey each aspect of your story, and collect as many as possible before your customer releases the RFP.

Often, solicitations from a particular customer require the same or similar information as part of every bid. Use this trend as a source of customer intelligence as you collect proof point information prior to RFP release. Gather and review solicitations from the same customer acquisition organization. Identify commonalities between them and start gathering required proof point data.

Similar solutions successfully delivered to similar customers are ideal sources of proof points like examples and case studies. You start harvesting this information after you have a draft win strategy and add it to your store of proof points.

3. Conduct data calls before and after RFP drop, both internally and from teaming partners.

You should present proposal proof points for the prime contractor and any proposed teaming partners.

To build your proof points, you need data. To collect this data, you conduct data calls and requests to members of your company and teaming partners for information. When conducting a data call, specify a point of contact (POC) with who you would like to collect the information, what data you need, and detailed instructions for providing it, including clear due dates.

Help your POCs provide you with the level of detail you need by being specific in your request. If they provide data that is too general or vague, encourage them to dig deeper for more detail. A positive event that occurred "many times" may become 23 times, a "significant reduction in cost" may become "saved the customer $43 million," and so on. A good, collaborative relationship with your POC can make a big difference in writing a compelling proof point.

The POCs who collect your proof point data are often not part of the proposal team. They usually have "a day job" that shares their attention with your data call request. Be sensitive to this by sending your data call request as early as possible and by being specific about what kind of proof points you're looking for.

Craft and issue data calls pre- and post-RFP release to gather and aggregate proof point/evidence data. This information gives your team a significant competitive advantage by going beyond compliance to build a compelling bid.

Pre-RFP, the Opportunity/Capture Manager and the Bid or Proposal Manager should determine the following:

- What data best substantiate your features and benefits?
- What evidence is needed to substantiate your discriminators?
- What data will require long lead times?
- What data sources must you research and reach out to?

Post-RFP, the Opportunity/Capture Manager and the Bid or Proposal Manager should analyze the solicitation to determine the following:

- What additional evidence is needed for compliance-related proofs?
- How can you refine proof points to substantiate your features and benefits further?

Some examples of data and POCs for data sources include:

Staffing data call

POCs: Human resources (HR) and recruiting

- Personnel details (clearances, education, certifications, domain areas)

- Recruiting statistics (average time to fill positions, number of recruiters, size of recruiting database, recruiting sources)
- Retention rate (companywide and project-specific)
- Meatball charts (experience versus functional or technical requirements)
- Representative resumes

Past performance evidence and data call

POCs: Project Managers, SMEs, proposals and contracts staff

- Customer information
- Project information (period of performance, size in full-time equivalents [FTEs]/contract value/users, scope, complexity, relevancy)
- Award fees and incentives earned
- Contractor Performance Assessment Reporting System (CPARS)/Past Performance Information Retrieval System (PPIRS) ratings
- Achievements and innovations (performed testing with zero rollbacks, brought in web redesign under budget, identified efficiencies or new technology that saved the customer money)
- Meatball charts (past performance examples versus functional or technical requirements)

Corporate background and experience evidence and data call

POCs: Contracts, Chief Financial Officer, marketing, proposals, and SMEs

- Logos
- Corporate history
- Corporate revenues, personnel, customers, and locations
- Certifications and appraisals
- Industry awards and rankings
- Research and development (R&D) efforts
- Centers of excellence
- Recognized experts
- Publications and white papers

Customer kudos offering evidence of performance excellence

POCs: Contracts and Project Managers who can coordinate with customers for approval, if needed

- Congratulatory emails

- Awards and certificates of appreciation
- Quotes
- Success stories

Administrative/financial data call

POCs: Finance and contracts

- Federal Employer Identification Number (FEIN)
- Data Universal Numbering System (DUNS)
- Dun & Bradstreet (D&B) ratings
- Financials
- Rates
- Indirect costs
- Other direct costs (ODC)
- Accounting system
- Purchasing system
- Estimating system
- Defense Contract Audit Agency (DCAA) approvals
- Uncompensated overtime policy
- Compensation plan
- Representations and certifications
- Lines of credit
- Banking information

4. Maintain a repository of proof point data.

As you conduct data calls, you will collect large amounts of information that supports proposal proof points.

Many proof points can be reused, but it's important that your update the information periodically and as needed. Consider appointing someone to make sure the proof point data is up-to-date. Some organizations appoint a Knowledge Manager, who has the sole responsibility of making sure that the reusable data is up-to-date and refreshed. Based on customer debrief results, the Knowledge Manager should also be able to provide lessons learned regarding which proof points and evidence are most effective. This is more difficult to do without a Knowledge Manager, as team members may not be familiar with the lessons learned.

A proof points tracking checklist is provided among the tools and templates for this section. You can use this checklist to inventory and maintain a repository of reusable proof points.

5. Ensure that proof points are persuasive, tangible, and credible.

Make proof points **persuasive** by substantiating evidence of features and benefits that meet or exceed customer objectives and requirements. Here is an example of a persuasive proof point:

- *We know that staff retention is of utmost importance to the project. Our retention rate across the company is 90 percent, compared to 82 percent industrywide for similar IT positions. On Help Desk projects such as this one, our retention rate is 98 percent because of our focus on leveraging Help Desk Institute certifications and best practices.*

Show that proof points are **tangible** with quantitative evidence, such as facts and figures. For example:

- *Our company has performed 24 software development projects for 13 customers over the past 3 years, all of which were performed at CMMI Level 3 or higher. We have the reachback to staff the task orders through 5,700 qualified and cleared IT personnel across the team, of which 750 hold the required ITIL Foundation-level certification, 25 are ITIL experts, and 5,000 hold Secret or higher clearances.*

Finally, demonstrate that proof points are **credible** by providing verifiable evidence. For example:

- *We will meet or exceed performance expectations. In all 12 of our PPIRS ratings for eight agencies over the past 3 years, we achieved no lower than excellent or outstanding ratings. On all six of our performance-based contracts, we have achieved maximum award fees and incentives.*

6. Provide evidence of proof point accuracy.

Ensure that proof points contain specific, accurate numbers rather than approximate ones.

The customer must be able to verify proof points. Therefore, the proposal should identify data sources and provide specific customer references and quotes (ask for customer permission before using direct quotes). Some potential sources include:

- Specific project examples, case studies, and lessons learned that provide evidence
- Verifiable reporting tools. For example, in the United States, CPARS/PPIRS ratings and customer quotes are sources of verifiable evidence because they can be confirmed by the Source Selection Board.
- External, unbiased third parties, such as industry appraisals, awards, or ratings that offer evidence of corporate experience levels
- Data aggregation that shows size and strength

- Comparisons to show meeting or exceeding industry standards to ghost the competition
- Results that point to specific achievements

7. Aggregate and interpret data

To demonstrate size and strength, the proposal should substantiate aggregated proof point data across company locations, divisions, subsidiaries, and programs/projects. When bidding with teaming partners, the prime contractor should gather and total team data, such as revenues, locations, FTEs, similar projects, certifications, and so on.

Aggregating data is not enough, though. Don't just list numbers; explain what the numbers mean. To provide further substantiation, focus data on achievements and accomplishments. Examples include evidence of cost savings, reduced prices, a percentage increase in efficiency, awards received, percentage increase in customer satisfaction, and decreased wait times.

Application in Diverse Environments

Importance in all proposal settings

Whether small, medium, or large, all companies must develop proof points to substantiate features and benefits. Without proof points, the proposal is incomplete because the customer will not be able to verify claims. All companies should maintain a knowledge base of reusable proof points as well as issue-tailored data calls for each solicitation to build proposal-specific data.

Common Pitfalls and Misconceptions

Waiting until the RFP drops

Start gathering proof points before the RFP is released. Starting early allows your team to identify gaps in supporting evidence. For features and benefits lacking proof, the Opportunity/Capture Manager may need to add teaming partners to fill gaps. Gather initial proof points for the prime contractor and teaming partners through detailed data calls prior to RFP release.

Relying on features to sell the company

Many proposals are feature-rich but lack proof points showing that features will work and benefits will be realized. Proof points increase customer confidence by providing verifiable achievements.

Believing that benefits are enough

Merely stating the benefits of a proposed feature is not enough. Customers may not believe that benefits will be realized unless the proposal offers verifiable evidence. The best proof points discriminate your company by demonstrating that your proposed benefits are better than your competitors'.

Assuming that general statements are acceptable

Many companies use general, unverified proof points. Typical "generic" proof points include statements such as:

- We enjoy high levels of customer satisfaction. *How high*?
- We have low employee turnover. *Compared to what*?
- We offer relevant experience. *In what*?
- We have the personnel reach back to rapidly staff task orders. *Prove it*!

Putting proof points only in callout boxes

Weave proof points throughout the proposal and then highlight them in callout boxes, benefits and features tables, the technical narrative, action captions, graphics, resumes, past performance, and even the pricing narrative. Don't restrict proof points only to callout boxes or graphics.

Summary

- Proof points assure the proposal evaluator that the features and benefits claimed are real, verifiable, and achievable. Effective proof points reduce the customer's risk perception because the data provided substantiates claims made in the proposal.
- Assembling, analyzing, and presenting proof points requires time. Gather data early to corroborate proposed features and benefits.
- Conduct data calls with your team and partner contractors to collect data needed for persuasive, tangible proof points.
- Establish a repository of reusable proof points and continuously update it based on lessons learned.

Terms to Know

- Benefit
- Data Call
- Discriminator
- Feature

- Hot Buttons
- Proof Points
- Win Themes

Tools and Templates

- Proof-Points-Tracking-Checklist.xlsx

Proposal Organization

Proposal evaluators often scan rather than carefully read proposals to find the answers they need. For this reason, information should be easy to locate and understand.

Benefits of a well-organized proposal include:

- Higher evaluation scores
- Improved customer confidence in your ability to deliver
- Proposals that are easier to write

Proposals that are well organized and easy to understand have the following attributes:

- They provide a roadmap to how the proposal is organized
- They make key points easy for evaluators to identify and understand
- They are written from the customer's point of view, which is evidenced in the organization's scheme
- They tell customers what is important to them
- They use multiple highlighting techniques (headings, roadmaps, graphics, etc.) to enable evaluators to scan the document and locate the information they need

Best Practices

1. Plan content before you write

Content Plans plans are essential in team writing efforts. Use key team members to build the content plan. Make writing assignments and identify key points to cover in each section. Having a complete view of the entire proposal helps team members write their individual parts, and content plans help writers plan and structure their thinking before beginning to write. They also capture proposal strategies and show writers where and how to include the strategies in written content. Once the content plan is ready, provide word or page counts to writers to limit proposal size.

Careful planning can ensure you have clearly communicated your win themes and are on track to produce a compliant, consistent proposal. It also enables senior management to review a proposal—and potentially identify problems—before writing gets too far underway.

Require writers to complete content plans for their sections and challenge them to identify what the message should be in their respective sections. Draft Value Propositions and include these in content plans.

Choose the appropriate content planning tool familiar to your organization that fits the bid's characteristics and time frame. A few common planning tools are:

- Content plan
- Outline
- Annotated outline
- Mind map
- Presentation software
- Mock-up
- Bid directive

See Content Plans to guide your planning before you write.

2. Organize your bid or proposal according to the customer's instructions

Use the exact headings from the bid request and include all sections that the customer requires. If internal stakeholders want to digress from the client's format, be sure to inform them that doing so may lower their overall score. Prepare a top-level, topical outline that follows the prospect's organizational priority. Mimic the numbering system, naming conventions, and order listed in the bid request.

If the customer does not provide explicit instructions, follow the outline of the request and organize within that structure in an order that makes most sense, given your knowledge of the customer.

A technique used by many bidders to the U.S. military follows this approach. They call it "BLUF," which stands for "bottom line up front." This method enforces speed and clarity in writing and communicating, emphasizing:

1. State the most important information first

2. Add additional details for context, credibility, emotion building, etc.
3. Add general information to reinforce your message

You can use BLUF to structure an entire proposal or to structure each section of a proposal.

3. Make information easy for evaluators to find

The introduction to the proposal and all subsequent sections should provide a roadmap for what follows. Plan summaries at all levels of the proposal to reinforce key information.

The executive summary, which you should always write first, is particularly important. Use the executive summary to connect with the customer, demonstrate an understanding of their key issues, provide a solution for each issue, and summarize what you're offering. Not only does the executive summary deliver a compelling message to the customer, but it also provides a clear guide to all contributors. The executive summary should remain brief and high-level so decision-makers can review the highlights of your proposal.

Headings are a key way to direct evaluators to information. They clearly mark when you are moving to the next key point. Use headings to organize and announce content. Be sure headings at the same level are parallel in structure. Use both telegraphic headings and informative headings throughout the proposal. Telegraphic headings label content but do not provide a description (e.g., "Solution"). Informative headings, on the other hand, are usually short, informative phrases (e.g., "How Our Solution Will Benefit Your Company"). Use telegraphic headings to label major sections and use informative headings in all other instances to provide additional detail for the evaluator.

Limit numbered headings to three levels unless otherwise directed in the bid request.

The most important things to remember when organizing your proposal are to keep your customers in mind, follow their requirements, and make sure your proposal is easy to navigate.

4. Use a structure that layers information for the reader

Some solicitations may require that you structure information in a particular way. Others may allow you to use the structure you think is best. For responses in which you have some flexibility, structure your points in a way that "layers" information for the reader.

Begin by introducing a topic (e.g., your solution) and explaining it at a high level. Gradually add to your explanation with supporting facts and claims (e.g., the features and benefits of your solution). Ask yourself the "so what" question and see if your features offer a relevant benefit. Next, give proof for your claims with examples, case studies, and other details (e.g., descriptions of your past performance). Address any potential drawbacks or give further support for your own position (you could do this by ghosting the competition). Finally, write a conclusion that summarizes your main points and reinforces your position.

Make key messages "pop" by using bold text, callout boxes, and graphics. See Persuasive Writing for additional information on structure.

5. Group similar ideas and avoid redundancy

Often, a bid request will scatter similar questions throughout multiple volumes of an RFP. This creates confusion for both proposal developers and reviewers. Multiple authors may unknowingly answer the same question two different ways, which may leave customers without a clear understanding of your solution.

To limit confusion, examine an RFP before writing and use content plans to help writers identify and group similar ideas. If an RFP does not require a particular structure, group similar ideas together and eliminate redundancies. If the RFP has specific instructions for response structure, use the following guidelines:

- If the RFP asks the same question in two different volumes, repeat the answer (and tell reviewers that it is repeated). Cross-check to ensure the answer has a consistent message.
- If the RFP asks the same question more than once in the same volume, answer the question fully in the first instance. In later instances, summarize your answer and cross-reference to the full answer's location.
- When an RFP forces you to answer similar questions in disparate sections of a response, summarize your solution in the structure you prefer. Then, answer questions following the customer's requirements.
- Consider using a compliance matrix, which can help the client identify where you've answered each question in the document.

6. Put the most important points first

Whether you are writing a proposal section, a paragraph, or a simple bulleted list, put your most important points first. For example, if you are introducing your company's solution, don't begin with technical details or your staffing plan. Instead, tell customers what you will do and how it will benefit them.

This technique helps busy proposal reviewers, who want to get to the heart of your solution as quickly as they can. The faster you can give them a compliant response, the faster they can score the question and move on.

Application in Diverse Environments

Use planning tools in all settings

You can use proposal organization tools and methods for different sizes and types of proposals. You can also use different types of content planning tools on the same proposal—you do not have to choose just one. The Proposal Manager should choose the tools based on the size, type of opportunity, needs of the review/leadership team, and available time.

Detailed proposal organization techniques may not be as critical for proposals with boilerplate or standard text and graphics. However, you can still use them to develop the sequencing of messages in headings to build consistent, persuasive messages.

Common Pitfalls and Misconceptions

Writing before planning

The most common error related to proposal organization is starting to write before developing a plan. Some teams may even think they can leave matters of organization until the first draft and review process.

Ideally, teams should plan proposals using a content planning tool to organize their most important points. They should then develop graphics to support these points. Only when a solution is fully planned, organized, and illustrated should the team begin to write. Content planning doesn't have to be complicated—it simply means thinking before you write.

Summary

- Content planning matters because proposal evaluators are short on time. The more easily they can get the information they need from your proposal, the better.
- Proposals should be organized with customers in mind, following their requirements and making navigation simple.
- One way to make reviewers' jobs easier is to put the most important information first, followed by less critical information.
- Content planning should always precede actual writing. In fact, the writing stage should come last.

Terms to Know

- Content Plan

- Informative Heading
- Telegraphic Heading
- Value Proposition
- Win Themes

Q&A Proposals

Question-and-answer (Q&A) solicitations can be especially challenging and often require fast turnarounds. Not only do these often ask many questions—they also ask open-ended questions. Different Q&A solicitations tend to have different information and presentation requirements, even compared with solicitations in the same industry.

Best Practices

1. Establish a definite win strategy.

One challenge of Q&A proposals is differentiating your organization's proposal from others. To create separation, you need to formulate a win strategy based on:

- The customer's stated needs
- Stated and implied hot buttons: any feature, characteristic, measurement, or objective the customer uses to identify desirable products, services, or organizations
- A strengths, weaknesses, opportunities, threats analysis of your product/service
- Your organization's differentiators and discriminators

If you respond often to Q&A solicitations, you should create an easy-access archive of strategy documents, templates, and reusable approved content that you can continually refine and use in future opportunities.

2. Outline your proposal.

a. Prepare the response by putting questions into your proposal template.

Take the questions from the RFP and drop them into your company's proposal template. The template should include standard sections such as a cover page, cover letter, table of contents, executive summary, body, and attachments. The template should include document and character styles for easy and consistent formatting.

When pasting the questions into the body section of the proposal template, ensure the numbering of the questions is the same as those in the RFP. Create visual distinctions between sections such as headers, colors, and theme statements.

b. Distinguish between easy and difficult questions.

An initial pass through the questions will reveal some that can be answered easily and directly and others that will require more thought, research, and general effort.

After identifying the relatively easy questions, use bullets or keywords to indicate main ideas and their order for each easy question. As a rule, the first bullet's content should directly address the specific question and use its language and terms.

Bullets and keywords should refer to content, not to earlier documents. For example, you should put in a particular fact, such as "20 consecutive profitable quarters," rather than "use content from ABC proposal."

This tactic allows you to match content to strategy, and it allows you to execute the strategy consistently throughout the proposal. You want to move quickly through the easy questions, but you also want a strategic unity across the proposal.

c. Distinguish between the least and most important questions.

A more careful review of the questions should reveal which questions have the most impact on proposal scoring and evaluation. The more important questions directly relate to customer hot buttons and vendor discriminators. Focus first on the questions of lesser importance and indicate content through the bullet point/keyword method.

As in the first outlining step, aim to move quickly through questions of lesser importance. Understand what content will directly answer the question, indicate it specifically through bullets and keywords, and then move on.

d. Plan content for the difficult and important questions.

Questions may be difficult for several reasons. A question may be completely new, something you have never answered before. It may require official documentation or other proof to be submitted along with the proposal. It may ask you to conduct a calculation or other analysis.

Follow the logic of earlier practices by first distinguishing which questions are difficult yet less important. For these, determine what content will serve as the minimal compliant response, and then establish the tasking and turnaround time to obtain this content.

Aim to get this content locked down and complete as early as possible. It may be helpful to summarize or paraphrase relevant documents. When appropriate, document the sources of your response.

Eighty percent of your proposal's strategy should concern the important questions. If you have been following the process described so far, you now have to answer the easy-important questions and difficult-important questions. Start with the easy ones, but don't be fooled by their relative easiness. Your responses to these questions should emerge from your win strategy. Highlight your discriminators, use visuals, and, above all, demonstrate sound understanding of customer needs, objectives, and issues.

This leaves the difficult-important questions for the last step, and here the process should focus first on determining levels of compliance: What *must* your response include to demonstrate compliance, and what *could* the response present that would set you apart from the field? These responses should include both *must* and *could* content, but you need to know what will give you minimal compliance if *could* content becomes impossible to obtain.

Now, you can proceed with answering the questions.

Collect relevant documents from internal and external sources. Common internal documents may be previous submissions, marketing material, or specifications that are unique to your industry. Ask your connections across your organization for recommendations on what to look for and how they have answered in the past. Your external resources can come from the Internet, but make sure you are consulting reliable sources.

Be specific in your requests and queries, but also allow your sources to provide information that may be adjacent to your request that you didn't think of. It is also wise to interview subject matter experts. Develop a system that allows you to track where you captured the information for future reference and annotation in the document.

This process may take some time, especially if you are thorough. Rely on your ability to read information quickly and categorize content. Similar to creating proposals, consider using specific "data calls" to informants as you work your way through the content. Remember to continually document your sources.

As always, your writing should be original, unless you attribute it to a source. Paraphrasing and summarizing in your own words is always allowable. When quoting from a document, person, or other source, ensure you are following your internal style guidelines or a commonly used style in your industry. Rephrasing can be further enhanced through the use of services such as Grammarly or PerfectIt and through the work of a professional editor.

e. Confirm all content.

Because Q&A solicitations often require fast turnaround, the Proposal Developer's outlining skill and speed become critical to an organized, successful effort. Build the outline as soon as possible, with full layout of bullet points, notes, and visuals. Then, make it available for stakeholders and management to review, comment on, and approve. As a result of this review, you should gain consensus on the strategy and raw content plan. Then, you should make content assignments—with deadlines—for every question. As you build your response, be sure to use this valuable institutional knowledge, and document any externally sourced information.

3. Use lean, concise content.

Q&A solicitations often do not have page restrictions, so you may be tempted to give long, wordy responses. However, in Q&A solicitations, evaluators may be more interested in "checking the box" than in assessing the technical merits and details in certain responses. For example, they may only care that you meet a particular quality standard. If you meet the standard and have documentation, then the evaluator will mark your company viable for that question and move on. Extended prose on your processes will have little to no impact on your final ranking.

However, if quality processes are a differentiator for your company, you can aim to make them a discriminator by using a visual with a caption relaying your strategic message. Often in Q&A proposals, putting visuals and documentation first, supported by short, strong messaging, yields the most impactful presentations.

In visuals and text, aim for a streamlined approach—clear, direct, fact based, and concise. Your company's compliance and expertise in key areas should be unmistakable throughout.

4. Immediately, directly answer the question.

The most important rule in Q&A proposals is to ensure that the first sentence of every response directly answers the question that has been asked. This is not always easy to do, especially if compliance is not clear on certain items. But with a strong strategy and an understanding of which questions are the most important, you should be able to score well on the critical questions and establish enough separation between your company and others to remain competitive.

An executive summary can be your best tool for delivering an overall argument and narrative in your favor. Visual, concise, and focused on the customer's priorities, the executive summary will almost certainly be reviewed by the broadest audience of evaluators and decision makers. Make it count by answering the top implied question of the Q&A solicitation: "Which organization is the best choice for me?"

Application in Diverse Environments

Responding to different types of solicitations

In some organizations, the Proposal Manager may be required to develop virtually all of the proposal content. In other organizations, certain sections may be allocated to others.

Many Q&A solicitations are presented as a single series of questions. Others, particularly longer ones, break up questions into sections. For the latter, consider including a preface (e.g., theme statement) to each section of responses. These brief introductions are an opportunity to show evaluators what distinguishes your offer and organization from the rest of the field. They can also help guide the proposal writers.

Recent Trends

Online portal submissions

More frequently, Q&A solicitations are being issued on website portals, where responders must enter content online and upload attachments. Review all training material provided to familiarize yourself with the system before starting the response. Be sure to find out if there are word limitations or formatting restrictions so that you can plan your response accordingly.

Common Pitfalls and Misconceptions

Lack of strategy and planning

The most common misconception surrounding Q&A solicitations is that there is no need to formulate a coherent strategy beforehand—that doing so does not significantly influence your win probability. However, it is reasonable to assume that win probabilities within particular markets will increase as a company develops specific strategies for communicating with and supporting these markets. Improving win probability often requires a long-term view and monitoring of not just one proposal outcome, but many.

Summary

- Examine the solicitation, the customer, and your organization to define a critical messaging plan before launching into responses
- Set up your proposal document and begin outlining activities by distinguishing between easy and difficult questions, and then between the least and most important questions
- Plan content carefully for the most difficult and important questions
- Review the most difficult and important questions with management
- Be sure to document how information is obtained and used in the response
- In drafting responses, use lean and concise content, particularly visuals
- For each response, directly answer the solicitation question in the very first sentences
- Use executive summaries to your advantage

Resumes

Whether a government agency or a business, all customers want organizations proposing to support them to demonstrate that they either currently employ or can rapidly access personnel with experience directly relevant to the work to be performed.

To win, you must provide resumes of actual personnel who have demonstrated experience in the work described in the procurement. Promises that you will find and hire the personnel after contract award are not sufficient. Nor should you submit unnamed resources: Always recommend individuals by name in your bid response.

When planning and developing proposal resumes, your goal is to show the customer that your personnel are:

- Actual personnel
- Fully available as soon as the contract starts
- More qualified than personnel of any other bidding organization

Best Practices

1. Team Selection

Selecting the right people to deliver the service to your customer is almost always a very important part of your offer. Make conscious decisions about who is best suited to support the customer by considering:

- The customer's market sector, vision, values, motivators, and issues
- The customer's team—their personalities and hot buttons
- The customer's requirements
- The hard and soft skills and experience of the available personnel from your organization

Once identified, it is important to plan how your team and the individuals within are represented in your proposal.

2. Gather and screen resume resource material from candidates.

As you identify the personnel for whom resumes will be submitted, contact each person to initiate the resume development process. Help them to meet your proposal development schedule by clearly outlining the resume development timeline. Remember that the person may be unavailable to work with you during standard business hours or may be in a different time zone.

If you are fortunate enough to have one, your corporate resume database is a good starting point for content development, but be sure to ask the candidate for other materials they have that are not a part of the database, such as the person's:

- Corporate resume. Ask the candidate to review and update it if it is more than a year old
- "Street resume." The version the candidate used or uses to apply for positions in the past year (this step is not applicable the bidding organization's long-term employees who may not have a recent street resume)
- Any "reuse resumes." Versions of the candidate's resume that may have been tailored for similar, recent requirements of other proposals
- Photo and signature. If needed, request a high-resolution photo and scanned signature (if required)
- Solution-specific examples. Any examples, success stories, anecdotes, or customer testimonials that are directly relevant to the opportunity and aren't currently included in any other resume that you may have.

Check the resource materials you've gathered to ensure that the person and the details provided meet the RFP requirements. Ensure that the person has the required security clearance, education, certifications, years of experience, and specific relevant experience (for example, programming experience using a required software development tool).

If an RFP requires letters of commitment or letters of intent, involve a human resources specialist to develop the required text and work with the candidates to secure signatures. Take a similar approach when the RFP requires any personally identifiable information, such as the candidate's place of birth. Protect the bidding organization and individual by involving a personnel or human resources specialist.

If the position requires a security clearance, provide the clearance level at the top of the resume, alongside the person's name. Involve a facility security specialist to gather and verify the clearance information. Many personnel do not know the complete details (e.g., issuing organization and date, polygraph type) of their clearances.

If a chosen candidate does not meet all the RFP requirements, replace that person now rather than during the writing stage.

Have the candidate review the draft resume before final document review. After addressing the review team's suggestions and completing any final editing and formatting, provide the candidate with the final version of the resume for review and approval. Make sure the person can be reached outside standard business hours so you can remain on schedule. There may be substantive changes, even at late stages. Keep a record of the person's approval of the final version.

3. Use a standard, easy-to-follow template.

Your master resume template should comply with all RFP requirements (including, for example, the labor category, SOW and PWS titles, and any relevant attachments) and should be easy to skim and evaluate.

Set up the resume format up front that's compliant with the customer's instructions, which ensures that the final resume is in the right style, font and font size, and colors.

An RFP often includes a specific per-resume or per-volume page count, font size, font setting, and margins. If not, work with the Bid or Proposal Manager to establish common expectations. If the RFP does not specify a per-resume page limit, consider the size and complexity of the submission. Shorter, less detailed proposals should perhaps target resumes on a single page. More complex and technical proposals could include more complex resumes that span three pages.

Unless the RFP specifies a different format, structure resumes as follows:

- Clearly identify the person's position within the proposed solution or labor category, and include the RFP sections referenced in the internal resume template headings
- Summarize the person's key qualifications at the top of the resume. This summary can be expanded, as space allows, into a short resume and can be used in any personnel overview tables the proposal team creates. Think of the summary as the key points of the person's career that are most relevant to the RFP and the position the person will fulfill. Also, if the RFP requests it, add any reporting lines or who the person reports to directly.
- Add a section that covers other work that the person has delivered for similar customers or situations—the most relevant first (not necessarily most recent), including a short summary of the role delivered and the benefits achieved for the customer
- Outline the staff member's education, training, and certifications. If possible, provide certification numbers and the year received to prove the certification is issued by a recognized organization and remains current. Do not include certifications that are not relevant or more than 5 years old. Program Managers typically require Project Management Institute Project Management Professional certification. An Information Assurance Specialist typically needs to be a Certified Ethical Hacker. Programmers typically need certifications and training in specific programming languages, such as Red Hat Linux or C.

- List positive testimonials from clients or awards. This will add to their qualifications and expertise.
- Put the person's education after the details of the relevant experience rather than at the top of the resume.
- Add personal references if requested. Start this earlier in the process when you gather the resumes so the staff member has time to notify the reference and confirm they are willing to be used as a reference.

4. Write clear, results-oriented resumes.

A writer—instead of the person whose resume is being prepared—should develop the first draft of all resumes. This minimizes the staffing candidate's time and makes the writing more efficient and consistent. As needed, ask the candidate for missing keywords, specific experience, and compliance-related information.

To make your resumes personable and relatable, write them in the first person (unless your writing guide states differently). Resume content should not focus on each person's responsibilities and functional duties. Instead, focus on what the person accomplished in each position. For example, rather than writing that a person wrote a computer program (which describes a duty), state the name of the programming language used, the name of the system the person programmed, and what efficiencies or cost savings the organization gained as a result, in addition to providing measurable accomplishments, list methodologies, processes, tools, and systems the person used in each position.

Make the content compelling by ensuring every bullet or paragraph contains a customer-focused, measurable benefit. Write clearly and use short sentences. While the work you're describing may be complex, the language you use in the resume should be simple.

5. Build a corporate resume database

Every bidding organization needs a corporate resume database. Resume writers can then search the database to identify currently employed personnel with the key skills and experience required for the proposal. One way to keep the corporate resume database up to date is to require employees to update their resumes as a part of performance reviews.

As proposal-specific resumes are created for personnel, those resumes should either be added to the corporate resume database or to a separate "resume reuse material" database.

Application in Diverse Environments

Scarce writing resources in small organizations

Many small organizations have a sole writer assigned to write resumes; some lack a corporate resume database. Writers pressed for time should focus on writing a strong summary of the candidate's qualifications that features key words and metrics, contains a solid description of the candidate's current job, and is compliant with any resume format requirements in the RFP.

Many personnel from whom to choose in large organizations

Large organizations, in contrast, often engage in a more deliberative process for choosing the personnel whose resumes will be submitted. Often, the bidding organization may build a team of subcontractors. In these cases, initiate resume writing as each candidate is identified, rather than waiting until the entire personnel list is complete.

Special considerations for U.S. federal procurements

U.S. federal agencies often assign the personnel volume of a proposal a large percentage of the RFP Section M evaluation criteria. Keep in mind that some agencies, including many from the U.S. Air Force, use an automated software tool to score resumes. This makes using appropriate key words particularly important.

A typical federal RFP will have no more than 25 key positions (also known as labor categories). Most often, an RFP requests 15. Sometimes, a federal RFP requires position titles and specific experience for the entire staff—which can mean as many as 500 resumes.

Recent Trends

Use of headshots with resumes

When digital photography became readily available, many organizations began to include thumbnail-sized photos on resumes as a standard practice. In continental Europe, both suppliers and buyers prefer the use of personal photos to create a personal relationship.

In the United States, in contrast, the trend has fallen somewhat out of favor. The perception is that taking a business-appropriate, high-quality photo takes time that might be better spent on strengthening resume content. In addition, you cannot be sure that evaluators will not make judgments based on your personnel's appearance rather than their qualifications.

Common Pitfalls and Misconceptions

Failing to tailor resumes to a proposal

Standard resumes used when applying for a job, or "street resumes," are not the same as proposal resumes. Proposal resumes are customized to the RFP and written to respond to the customer's needs in a concise manner. Much of the content that appears on candidates' "street resumes" may be irrelevant to a proposal. Include only the experience and qualifications specified in the RFP.

Summary

- A resume database can help organizations easily access and update resume content
- While proposal teams should work with candidates to gather and verify resume information, a dedicated writer should draft resume content
- Proposal resumes are different from "street resumes." Rather than listing all of a person's work experience, they should be tailored to specific RFP requirements.
- Use a standard, compliant, easy-to-scan template to present resumes
- Resumes should emphasize accomplishments, not responsibilities

Tools and Templates

- Resume-Template.docx

Review Management

Effective functional review management shows executive and organizational commitment to disciplined business acquisition. To effectively manage organizational cycles of reviews, teams must understand, regularly practice, and work to improve execution of reviews. Effective reviews are structured and organized in advance to ensure success and are more effective when the right people attend.

Good reviews result in actionable improvements that increase your probability of win on opportunity/capture pursuits. Good reviews require sufficient time to be conducted and sufficient time for follow-up actions that improve your organization's chances of winning. Delayed reviews can mean that time available for completion is reduced, as writers may not have time to update their sections.

Best Practices

1. Use appropriate reviews to improve the quality of your bid

Mature organizations establish repeatable, quantitatively managed processes for BD. A key element of the BD process is a series of appropriately timed reviews. These reviews focus on examining the applicable building blocks for persuasive proposals at the proper sequence in the process.

The table below provides an overview of reviews that should be included in a mature business development process design. Many, but not necessarily all, of these reviews should be completed for most proposals. Review teams should tailor processes to consider the customer's buying cycle, the bid timeframe, the complexity of the engagement, and the value of the bid, in deciding which reviews to conduct.

REVIEW NAME	ASSESSMENTS	TIMING	OBJECTIVE
Market Assessment	An assessment of the plan to achieve specific business market objectives within an industry or market segment	-	-
Account Review	An assessment of the sales plans for potential opportunities with major customers	Quarterly by major business account and targeted new accounts	Provide guidance on account maintenance, growth, and penetration strategies; assess progress
Competitor Review	An assessment and analysis of competitors' likely strategies and solutions for a specific opportunity/capture	Multiple reviews beginning as early as possible before RFP (6 to 12 months in national government markets; shorter in commercial markets)	Predict competitors' potential strategies and solutions by using experts to do a detailed team analysis of each competitor, including yourself
Opportunity/ Capture Plan Review	An assessment of the opportunity/capture plans to validate the win strategy and planned positioning actions for a specific opportunity/capture	Six to 18 months before RFP on large federal efforts; 3 to 12 months on large commercial efforts; 2 to 6 months on smaller national government and commercial efforts	Review win strategy and effectively assess probability of win and probability of go of effort. Agree on course of action to increase probability of win and examine probable solutions to ensure match with customer requirements and hot buttons.
Content Plan Review	An assessment to validate the execution of the bid strategy for writers and to verify	Initial planning can take place before final RFP release	Assess proposal strategy (story, messaging, solution depictions, proof) to ensure

	compliance with customer requirements	and repeated after RFP release	competitiveness, compliance, thoroughness, accuracy, and alignment with customer requirements, needs, and hot buttons. Provide concrete direction to team for improvement.
Final Document Review	A comprehensive review of the proposal by independent reviewers who emulate the customer's evaluation team. It includes independent assessment of the entire proposal, its readiness and responsiveness to the solicitation, and its effectiveness in conveying strategy, themes, and discriminators, as well as ghosting the competition.	Schedule the final document review when the response is 75 percent to 85 percent complete.	Final document reviews are preceded by content plan reviews or other designated reviews based on organization master process. The final document review team determines compliance, discrimination, and alignment with the customer's mission, needs, requirements, issues, and hot buttons and provides concrete direction to the team for improvement.
Business Case Review/Senior Management Review	An assessment of all the internal milestones and approvals (internal governance) required to sign off on the solution, pricing, and legal requirements	All signoffs should be complete at least in line with the final document review	Approve final pricing strategy and any other elements requiring senior management approval prior to submittal
Lessons Learned Review	An assessment of the proposal development/management process and results conducted after completion of a proposal. Its purpose is to identify areas for improvement on subsequent projects.	First review right after submittal. Second review after win/loss debrief.	Review process execution and recommend specific improvements where required. Ensure understanding of reasons for the win or loss. Correct deficiencies in processes or approach or repeat winning processes/methods on other opportunities.
Project Review	A series of reviews to ensure an organization is meeting milestones and achieving objectives as promised in a proposal	Periodic after award and performance begins	Critical to building successful past-performance history that can be referenced on future efforts

2. Set up each review to answer a series of key questions

Organize reviews around desired outcomes. For example, we conduct account reviews in an effort to achieve strategic actions that enhance the probability of gaining meaningful business with an account. Hold the review well in advance of the expected outcome and repeat it quarterly to keep focus on the objective.

Clearly identify and include reviews at appropriate points in the business development process. They must be held on schedule to allow time for actions to be taken to increase probability of success. Figure 1 depicts a notional end-to-end business development process and the sequence of team reviews.

PHASES	BID DECISIONS	TEAM REVIEWS	MAJOR OUTPUTS
MARKET IDENTIFICATION	Market Entry Decision	**Market Assessment** – An analysis of market potential and requirements vs. corporate capabilities	Strategic Plan ▪ Market Strategy
ACCOUNT PLANNING	Opportunity Qualification Decision	**Account Review** – Periodic reviews of opportunity potential within targeted accounts	▪ Account Plan
OPPORTUNITY ASSESSMENT	Bid Pursuit Decision	**Competitor Review** – An assessment and analysis of competitors' likely strategies and solutions	▪ Competitive Assessment
OPPORTUNITY PLANNING	Bid / No-Bid Decision	**Opportunity Plan Review** – An assessment of the opportunity plan and validation of the win strategy and required actions documented in the opportunity plan	▪ Opportunity Plan ▪ Pricing Strategy
PROPOSAL PLANNING	Bid Validation Decision	**Proposal Strategy Review** – A review of the content plan to validate the execution of the bid strategy for writers and verify compliance with customer requirements	▪ Proposal Strategy Plan ▪ Proposal Responsibility Matrix
PROPOSAL DEVELOPMENT	Final Review	**Final Document Review** – A comprehensive review of the proposal by independent reviewers who emulate the customer's evaluation team **Business Case Review / Senior Management Review** – Includes all the internal milestones and approvals (internal governance) required to sign off on the solution, pricing, and legal requirements	▪ Proposal Outline ▪ Response Matrix ▪ Style Sheet ▪ Content Plan ▪ Proposal Budget ▪ Executive Summary ▪ Proposal Plan ▪ Proposal
NEGOTIATION		**Lessons Learned Review** – An assessment of the proposal development / management process and results, conducted after completion of a proposal to identify areas for improvement on subsequent projects	▪ Best and Final Offer (BAFO)
DELIVERY		**Project Review** – Periodic status reports and performance reviews with customer	▪ Products and Services

Figure 1. Team Reviews and the Business Development Lifecycle. Following a managed team review process enhances probability of overall business development success.

Competitor reviews help predict competitors' approach, solutions, and strategies

The purpose of the competitor review is to anticipate the approach, solutions, and strategies that competitors are likely to use. This is often done through role-playing. Use a competitor's former employees, consultants, and suppliers to formulate probable solutions, win strategies, and counterstrategies to test the credibility of your own approach. Outputs from the competitor review provide the basis for ghosting the competition by highlighting weaknesses in their solutions and neutralizing their strengths.

Competitor reviews can be conducted multiple times during the business development cycle. The first should be in the opportunity/capture phase, before a pursuit decision is made. Then, based on the complexity and significance of the pursuit, a second competitor review can be conducted during the opportunity/capture planning phase.

The Opportunity/Capture Manager or Account Manager plans and schedules the competitor review and selects team members from both the company and external sources based on their ability to assess opportunity/capture plans and their knowledge of the customer, competition, solution, and industry trends. The Opportunity/Capture Manager should select team members from business development and relevant business areas such as solution design, as well as consultants, employees, retirees, and suppliers who have recent experience with likely competitors.

The competitor review should answer the following questions:

1. How should we try to influence the procurement?
2. What are competitors' strengths and weaknesses?
3. What are competitors' likely strategies?
4. How do we compare to competitors on the customer's key issues?
5. How do our technical approach, price to win, risk profile, and past experiences compare?
6. What weaknesses do they have that we can ghost?
7. Does the customer have a vendor preference?
8. How do we unseat the incumbent? How do we win as the incumbent?
9. What weaknesses do we have to overcome?
10. What actions should we take to strengthen our position?
11. How can we counteract competitors' likely moves to improve our position with the customer?

Evaluate the opportunity or capture plan during the opportunity/capture plan review

The purpose of the opportunity/capture plan review is to analyze the opportunity/capture plan and win strategy before the bid/no-bid decision milestone.

Review team members are independent of the proposal and opportunity/capture team but are knowledgeable about the prospect, your offerings and capabilities, and your competitors' offerings and capabilities. They review your opportunity/capture plan to validate your win strategy, value proposition, and solution.

Reviewers should also focus on validating your planned actions for moving your organization to the customer's favored position.

The Opportunity/Capture Manager plans and schedules the opportunity/capture plan review and selects team members from both the company and external sources. Members should be selected based on their ability to assess opportunity/capture plans, as well as their knowledge of the customer, competition, solution, and industry trends.

The opportunity/capture plan review should answer the following questions:

1. Does our strategy satisfy the customer's needs and requirements?
2. Does our strategy provide clear discrimination versus our competitor's likely approaches?
3. Is our strategy executable and complete?
4. Does our solution solve the customer's issues and demonstrate a superior value proposition?
5. Will our action plans move us to the customer's favored position?
6. Is our strategy straightforward and easy to understand from the customer's perspective?
7. Is a draft executive summary included that clearly differentiates us from likely competitors, demonstrates that our solution completely satisfies all the customer's needs, and provides a compelling value proposition?
8. Are the key messages articulated in the opportunity plan present in the content plans?

Effectively articulate your win strategy during the content plan review

The purpose of content plan review is to ensure effective articulation of your win strategy within your content plan and to verify compliance with the bid request before the start of proposal writing.

The content plan takes many forms. In essence, content plans help proposal teams think and plan before drafting text. Vehicles used for content plans include annotated outlines with comments about each topic, mock-ups, or even simple topical outlines for short proposals. The key in developing good content plans is to think before you write.

The Bid Manager, Proposal Manager, Opportunity Manager, or Account Manager picks independent team members from content and customer specialists. They should understand the customer's requirements, the bid request, your opportunity strategy, and the essential elements of preparing compliance checklists, outlines, and response matrices.

Reviewers should read the opportunity/capture plan and study key sections of the RFP before the chairperson convenes the review team and should brief the review team on the customer's perspective and requirements at the review kickoff meeting.

The content plan review should answer the following questions:

1. Is a draft executive summary available to drive the key message into the bid response?
2. Based on the content plan, is our response compliant with the customer's RFP or request?
3. Is the win strategy clear and reinforced throughout the content plan?
4. Is space allocated so that key messages predominate?
5. Will sections be easy to evaluate?
6. Does the content plan include preliminary graphics that communicate our key messages?
7. Are all customer requirements accounted for?
8. Are benefits linked to features throughout?
9. Do section summaries provide benefit statements?
10. Do the overarching themes and section themes clearly answer "why us"?
11. Are headings and other structure provided to improve readability?

Independent reviewers assess the proposal during final document review

The final document review is a comprehensive examination of the proposal by independent reviewers who emulate the customer's evaluation team. It includes independent assessment of the entire proposal, its readiness and responsiveness to the solicitation, and its effectiveness in conveying strategy, themes, and discriminators, as well as ghosting the competition. Schedule the final document review when the response is 80 percent to 90 percent complete.

The Bid Manager, Proposal Manager, Opportunity/Capture Manager, or Account Manager picks the final document review team. Members are independent of the proposal team and are expected to represent the customer's perspective. The team should include experts on the customer, the customer's industry, competitors, and your solution approach. In addition, members should be familiar with best practices on preparing and presenting winning proposals.

Include members from previous review teams for this review to help prevent contradictory guidance from dramatically different and uninformed team members. It is acceptable to add new reviewers to represent additional perspectives or subject matter, but the core group should remain the same throughout review cycles.

Reviewers can either make notes on a copy of the bid or, in more formal reviews, complete a comment form. In either case, compile all findings into one set of recommendations. Assign the recommendations to a select core group for implementation. Ask key players with the closest knowledge of the customer to implement the changes and a good editor to make final text edits.

For bid of significant value, organizations often create a scoring summary that mirrors the customer's evaluation criteria. Reviewers are asked to evaluate and score sections in the response against those criteria.

The final document review should answer the following questions:

Executive Summary

1. Does the executive summary connect your solution to the customer's business vision?
2. Does the executive summary link the customer's needs to the proposalsolution?
3. Does the executive summary counter potential major objections?
4. Does the executive summary name the customer more often than the bidder?

Themes and Strategies

1. Does the proposal effectively present our offer? Is it persuasive? Does it sell?
2. Does every section have a theme statement? Does that theme statement tie features to benefits? Is it specific? Is it quantifiable? Does the theme statement answer the question "so what"?
3. Does each section explain what is being offered and how it benefits the customer? Will the customer be convinced?
4. Does the proposal emphasize our strengths? Minimize our weaknesses? Ghost the competition?

Organization

1. Do all volumes and sections have summaries that link the customer's needs to the proposed solution?
2. Do all sections, subsections, and major topics have headings?
3. Are informative headings used effectively?
4. Are the most important ideas stated first in sections, subsections, and paragraphs?
5. Are details, facts, and data placed in the middle of sections, subsections, and paragraphs?

Visuals

1. Does the proposal contain enough visuals?
2. Do the key visuals reflect the strategy? Do they illustrate the major features and benefits of the offer?

3. Are all visuals clear and uncluttered? Do they convey a single, strong principle message?
4. Do the visuals stand alone?
5. Does each visual have an action caption? Do the action captions state the principle message of the visual and link key features to their benefits?

Appearance and Packaging

1. Do the pages have a clean, professional appearance?
2. Does the proposal use lists and headings? Is there plenty of white space, especially around key ideas and facts?
3. Is the proposal packaged professionally? Does it reflect the image of your organization?

Accuracy and Clarity

1. Are the facts correct? Are the data accurate?
2. Is every claim supported? Is there an appropriate amount of supporting data? Is the technical presentation credible? Are the claims believable? Proven?
3. Is the writing clear and to the point? Do all of the sentences make sense the first time you read them? Are any statements vague or confusing? Misleading?
4. Is the writing concise? Crisp? Not wordy? Can any words, jargon, or sentences be removed?
5. Have extraneous words, sentences, paragraphs, visuals, facts, or data been eliminated? Can anything else be eliminated?

Price

1. Is our price supported by a value proposition?
2. Is our price clearly stated? Justified? Credible?

Consistency

1. If the proposal was written by a team, are the parts of the proposal consistent with one another?
2. Does the proposal seem as though one person wrote it?

3. Adhere to the following guidelines for more effective review management

Standardize company review templates

Standardizing review templates increases efficiency and enables review teams to be more productive in defining actionable items that can help organizations position for and win business. Review templates should be standardized for each primary type of review described.

Establish review teams early

Establish review teams early so they have time to become familiar with what they will be reviewing and the strategies and objectives of the effort. For opportunity/capture pursuits, review teams should have access to opportunity/capture plans. For account reviews, review teams should have access to critical source information used to develop the account plan. Proposal review teams need time to become familiar with the proposal strategies and solutions to be effective. Early formation significantly increases teams' effectiveness.

Select the right review team leader

The review team leader can make the difference between a great review and a mediocre review. Review team leaders must be skilled in the type of review they will lead; have good organizational, communication, and leadership skills; and have a highly competitive nature that helps them drive the review team to actionable solutions.

TEAM REVIEW	REVIEW TEAM LEADER ATTRIBUTES
Account Review	Business development expert and leader successful in growing business on major accounts and developing business on new accounts
Competitive Review	Business intelligence expert familiar with analytical processes for assessing competitors, familiar with sources of competitive information, and skilled at facilitating competitive analysis sessions and reviews and providing guidance to teams on how to improve their competitive position
Opportunity/Capture Plan Review	Senior-level Opportunity/Capture Manager who has successfully developed and executed strategies to win large or strategic opportunities
Content Plan Review	Opportunity/Capture Manager, Bid Manager, or Proposal Manager who has a proven history of delivering winning proposals
Final Document Review	Opportunity/Capture Manager, Bid Manager, or Proposal Manager who has a proven history of delivering winning proposals
Business Case Review/Senior Management Review	Senior executive who has a history of successfully growing the business

Lessons Learned Review	Senior-level business development manager assigned to manage the lessons-learned process or a Bid or Proposal Manager skilled at facilitating and developing analysis to improve future processes and performance

Keep the same core team throughout the review cycle

Keeping the same people on the review team across reviews enables team members to learn with the performance team and keeps conflicting guidance to a minimum. It doesn't hurt to add some reviewers for specific reasons along the way, but your core team should remain consistent.

Incorporate teammates into reviews

Where appropriate, supplement your internal review team with members from your organization's teaming partners. They often have valuable insights into customers, competitors, and solutions that can help increase your probability of win and success over the short and long terms.

Use consultants in reviews as needed

Consultants can be excellent sources of customer knowledge and preferred solutions. In addition, external experts often can identify problems or issues with your pursuits and proposals and can provide simple remedies that increase probability of success with little additional cost.

Conduct effective review kickoffs and debriefings

Effective kickoffs increase review value. Plan the kickoffs carefully; ensure enough time is allowed and that clear instructions are provided to review teams to yield rapid, useful results.

Record comments and decide which to incorporate

Review team comments must be recorded, analyzed, and prioritized for action. Comments should address risks, strengths, and weaknesses associated with each reviewed item.

For any review, comments usually follow a normal distribution:

- Thirty percent of comments should be incorporated without question because they significantly increase probability of success
- Forty percent should be reviewed carefully for incorporation because they have high value
- Thirty percent usually get discarded because they have marginal or little value.

For proposals, address all comments related to compliance. After that, address comments that significantly increase the probability of win through better messaging, graphics, proof, or clarity.

Use subreviews effectively

Subreviews are used to enhance proposals. Generally, subreviewers are assigned to look only at a single element, such as the storyline (themes, action captions), compliance, graphics, or proof.

Types of subreviews include:

- **Vertical review.** Normally associated with the content plan review, these examine sections in depth for compliance, responsiveness, and persuasiveness. Most detailed, constructive comments result from this type of review.
- **Horizontal reviews**. Also normally associated with the content plan review, a horizontal review assesses a specific aspect of the proposal across all sections. For example, a horizontal review may look at theme statements. Another horizontal review may look at headings and the outlining approach by layer. A third could examine callouts and other forms of highlighting to ensure they are used consistently throughout.
- **Visual reviews.** This horizontal review focuses on visual and graphic elements, including action captions, for consistency and effectiveness.
- **Compliance review.** This evaluates the entire proposal against the compliance checklist to be sure it meets all the requirements stipulated in the RFP.

For account reviews, focused examinations of your organization, your competitors, and the customer all have merit. For proposal-related reviews, a horizontal review of the story, a visual review for graphics, and a compliance review yield good results for rapid quality improvement.

Debrief management on review results

Management should always be debriefed on review results to ensure continued engagement and awareness into progress for business win activities.

Application in Diverse Environments

Large business environments

Larger business environments with many competing projects may have more difficulty coordinating effective reviews. Participation must be expected and review team leaders should have appropriate authority to schedule, convene, and populate reviews with quality people who can deliver results. Review-team management should be a functional role within BD for best results.

Medium business environments

Businesses should focus on getting high-quality reviews at every step. A senior-level BD Manager should have the adjunct responsibility for managing the review process and ensuring that review-team leads are qualified to perform their roles and offer support for identifying quality personnel from all functions required to achieve good reviews.

Small business environments

The head of sales should ensure a disciplined review process is in place and set expectations that senior executives will participate and assist in setting up, managing, and populating review teams.

Standard proposals versus task orders

Review for larger proposals should be by co-located teams. Task orders or smaller proposals can be virtual, but must be managed in a very disciplined way to ensure best results.

Commercial versus national government environments

Proper reviews are critical in both environments. The same fundamentals apply in both settings.

Virtual reviews

Virtual reviews are becoming more accepted as organizations disperse. They can be very effective, but require even greater discipline to manage and to achieve high-quality results than do in-person reviews. If you plan to conduct virtual reviews, your review-team lead should be an expert at managing and conducting them.

Recent Trends

Creating efficiency and reducing costs

Overall changes in review management tend toward completing reviews faster and at lower costs. This has led to a rise of virtual reviews, night and weekend reviews, parallel reviews, staggered reviews, and reviews that are shorter, more frequent, and less formal than is standard.

Another broad trend is toward customization. This means an increase in tailoring reviews for proposal types and use of custom review environments and other tools.

Common Pitfalls and Misconceptions

Avoid these common misconceptions to improve your team's functional reviews:

- **Reviews are just a check-the-box exercise**. Reviews are critical to winning business. Like other members of proposal teams, review teams have direct responsibility for winning.
- **Little value comes from reviews.** Good reviews often make the difference between winning and losing.
- **Reviewing late in the proposal cycle is all right.** Late reviews are not helpful because teams don't have sufficient time to react and implement changes. Review early.
- **You can cut reviews to gain time for authors**. A good review may be what authors need to get back on track. Stop and do the review. Spending more time on a troubled product only makes a worse product.
- **Reviews can be planned quickly and easily.** Review management is a skill. Take time to plan reviews to make them more effective.
- **Anybody can be a good reviewer.** Some reviewers are much better than others. Find the great reviewers in your organization and use them. Good reviewers can be trained as well. Provide instruction and give them experience.
- **The Bid, Proposal, or Opportunity/Capture Manager should lead the review**. One of the reviewers should have the role of a review team leader to make sure that comments and recommendations are constructive and consolidated and provide independent feedback.
- **Executives should not be part of the review team.** Executives are a critical part of the review team. They didn't get where they are without reason. Also, if they aren't invested, why should the team be?
- **Subject matter experts have more important things to do than review**. If the technical or management solution is weak, your organization is likely to lose. Subject matter experts are critical to great reviews.
- **You don't need to review price proposals as carefully as other volumes**. Price proposals need reviews to ensure quality submittals. You don't want to submit something that doesn't make sense to your organization's bottom line.

Summary

- Reviews should be scheduled appropriately to allow sufficient time for proposal team members to incorporate reviewers' comments.
- All reviews should have an experienced leader who understands the customer and can keep team members on track.

- Organizations should keep the same core team throughout all functional reviews, adding team members with subject matter expertise as needed.
- Most reviews are associated with confirming the bid decisions. Reviews should be organized around desired outcomes and should improve the quality of your bid.
- Reviews can be adapted for any bid circumstance. Remember: It is more important to consider and deliver on the principles of the appropriate bid reviews than to be constrained by the review delivery mechanism.

Terms to Know

- Functional Reviews
- Review Team Lead
- Subreviews

Tools and Templates

- Notional-Comment-Form.docx
- Notional-Team-Review-Agenda.docx
- Review-Planning-Checklists.docx
- Sample-Schedules.docx
- Team-Review-Debrief-Template.pptx
- Team-Review-Inbrief-Template.pptx

Unseating the Incumbent

A simple way to organize opportunities is to think of two categories: competitions for new contracts, and competitions for old contracts, in which an incumbent contractor already holds the contract you're attempting to win.

Rebid competitions, in which an incumbent must defend its existing contract, require different tactics and strategies than competitions for new contracts. Incumbents have many advantages—they thoroughly know the customer, who's who and who matters, the work, and how much everything costs. However, with patience, smart opportunity analysis, and a persuasive proposal, you may be able to leverage an incumbent's typical weaknesses and win its contract.

Best Practices

1. Collect and compile intelligence on the customer and incumbent.

When an old contract is recompeted, the incumbent typically holds many competitive advantages over any challengers. The incumbent has strong evidence of a comprehensive understanding of the contract scope of work, complete knowledge of the customer's staff (including decision makers, decision influencers, and troublemakers), and an intimate familiarity with all cost factors associated with the contract. These advantages can be difficult to overcome in a head-to-head competition.

However, incumbents must avoid certain vulnerabilities that sharp competitors can exploit, including:

- Taking the customer for granted
- Not listening to the customer
- Acting as though it knows the customers needs better than the customer
- Slipping into a routine level of performance with no focus on innovation
- Tolerating cost growth
- Not being highly motivated or prepared for intense competition for its contract.

As a challenger, you must probe the customer's and the incumbent's organizations to identify the incumbent's shortfalls and gauge their advantages and vulnerabilities. Is the customer satisfied with the incumbent's contract performance? Is the incumbent performing well on all aspects of the contract, or are there deficiencies? Does the incumbent listen to the customer? Does the incumbent's management team lead effectively? Is something missing? Are costs accurate and reasonable? What could the incumbent do better? Overall, is the customer looking for more of the same or a new way forward?

Typical sources of information that provide such evidence include:

- Customer program and procurement staff, senior managers, technical experts, administrators, and workers at all levels (pre-RFP release)
- Members of the customer's staff who recently moved to other jobs or retired
- Any customer-, contract-, or incumbent-related paperwork (reports, correspondence, publications, other documents) available publicly or through Freedom of Information Act requests
- Current and former members of the incumbent contract staff who are willing to talk
- Current and former employees of incumbent subcontractors who worked on the targeted contract

Carefully filter the intelligence you collect because everyone has an opinion, and people often have opinions that don't align. A bidder comparison matrix can help you do this. Also, be wary of information provided by people who left the incumbent on bad terms—it may be tainted by emotion and not fully accurate. Getting as much accurate information as possible is important because you'll have to decide if your team can rely on that evidence and do a better job than the incumbent. If you can't, you shouldn't bother competing for the targeted contract. For that reason, this step must begin before the RFP is released.

2. Assess incumbent performance and develop improved solutions.

Compile and analyze the available information and objectively assess the incumbent's performance and the customer's satisfaction level. In addition to listing the contract requirements, identify the customer's issues and hot buttons. Assess evidence of the incumbent's performance against each contract requirement and customer issue, list the incumbent's deficiencies, and identify potential fixes or improved solutions that your company or team could deliver. Identify gaps or deficiencies in your team's ability to deliver the improved solution, and describe actions necessary to mitigate these gaps.

CONTRACT REQUIREMENTS AND CUSTOMER ISSUES/ HOT BUTTONS	INCUMBENT PERFORMANCE SCORE (1–5)	INCUMBENT DEFICIENCIES	OUR IMPROVED SOLUTION	GAPS IN SOLUTION	ACTIONS REQUIRED TO MITIGATE GAPS
…	…	…	…	…	…
…	…	…	…	…	…

Figure 1. In addition to listing the contract requirements, identify the customer's issues and hot buttons. *Assess the incumbent's performance against each contract requirement and customer issue, list the incumbent's deficiencies, and identify potential 'fixes' or improved solutions that your company or team could deliver.*

3. Qualify the opportunity; conduct decision gate reviews (bid/no-bid decisions).

The incumbent assessment worksheet should provide a clear indication of the incumbent's vulnerabilities and your company's ability to provide a better service or product. Use this information to answer the following key questions:

- Is this incumbent beatable?
- Can you assemble the resources and strategies to unseat this incumbent?
- Can you do a better job of meeting all of this customer's needs (and can you provide evidence/proof points)?

Thoroughly review the opportunity by proceeding through the sequential bid decision gate reviews to qualify and pursue the opportunity, proceed to the pre-RFP phase, and prepare and submit the final proposal.

Conducting these reviews should ensure continuing corporate commitment and senior management support of opportunity analysis and proposal activities, because unseating an incumbent can take a long time and require substantial resources.

4. Capitalize on the incumbent's weaknesses and neutralize its strengths.

Capitalize on the incumbent's deficiencies by developing better solutions, then test your solutions on the customer, tactfully increasing customer dissatisfaction with the incumbent's performance. Using the solution gaps and action items from the incumbent assessment, continue to develop and refine your solution improvements and ensure your ability to deliver them. Be careful how and when you reveal these ideas to the customer, however. The customer could simply take your ideas and suggest them to the incumbent.

Improve your competitive position by continuing to educate the customer with evidence of the improved solutions, desirable resources, better service, and more efficient performance that you would bring as the next contractor. Validate this with evidence that connects the potential customer with existing customers that would give excellent evaluations and testimonials of your performance on similar contracts. Submit white papers, make relevant presentations at industry conferences, and submit contributions to industry trade publications—and ensure that the customer receives copies. Build a sense of excitement about the new opportunities, capabilities, and resources that your organization can bring.

Prepare a persuasive proposal with evidence that matches or exceeds the incumbent on all evaluation criteria by neutralizing its strengths and capitalizing on its weaknesses. Beat the incumbent "between the lines" by addressing the customer's dissatisfactions, issues, and hot buttons with understanding and validated improved solutions. And don't forget to include evidence of your prior successes.

5. Carefully determine price-to-win; develop and implement pricing strategy.

Incumbents are frequently vulnerable in the area of cost growth. As employees remain dedicated to a contract, their salaries and wage rates tend to increase automatically. Additional personnel are often permanently added to a contract in response to short-term requirements or as a solution to meeting utilization/billability goals. As motivation to perform and please the customer declines over time, operational efficiencies tend to decrease, resulting in reduced productivity and increased labor costs.

Price-to-win becomes especially important when competing against an incumbent. Its program staff often overlook cost-reduction techniques because they 'know' exactly how many employees it takes to perform the scope of work, and they would never replace existing personnel with less experienced, less expensive employees. Corporate management often is used to a certain level of revenue and profit from the contract and would be unwilling to accept reductions in revenue or profit during rebid proposal pricing.

An astute challenger will learn the customer's budget and cost expectations, study the incumbent's resourcing and apparent pricing, and develop a bottom-up cost estimate by taking a fresh, objective look at resource requirements. There are also many opportunities to take advantage of innovative pricing opportunities that the incumbent likely wouldn't consider (e.g., stand-alone cost structures, fixed or unit prices for portions of the contract, and reductions in annual costs as contract objectives are met).

All of these activities should lead to the development of a realistic, believable lower price than the incumbent's expected price. A challenger almost always has to underbid an incumbent to take away its contract, unless it can clearly offer a quantifiable best value compared to the incumbent. Implement a pricing strategy early in the opportunity/capture planning phase and build a persuasive proposal that clearly demonstrates the benefits of your lower-cost approach.

6. Be vigilant and prepare for surprises.

Challengers seeking to unseat an incumbent often face little or no pushback from the incumbent during the early opportunity planning phases because the incumbent mistakenly assumes that re-winning its contract is a foregone conclusion.

However, as the incumbent becomes aware of your activities to penetrate the customer's and its own organizations and to focus on its performance deficiencies, expect the incumbent to fight back fiercely to protect its contract. Watch for and prepare to combat disinformation spread by the incumbent and for other countervailing tactics to neutralize your own strengths. Staying ahead of the incumbent with competitive tactics will ensure your ability to establish and maintain a competitive advantage.

Especially for higher-value contracts, be on the watch for political influence applied to affect the contract award decision. Astute companies have learned the value of forging relationships with local-, regional-, and national-level politicians and may call on them to influence procurement officials to help steer an award toward their company. Incumbents, feeling threatened by a challenger to their contract, often will tap into their political capital to help ensure a re-win.

Application in Diverse Environments

Incumbents and challengers must compete according to whatever regulatory requirements and business practices are in effect for the targeted contract. Procurement regulations, communication restrictions, and competitive practices can vary in different environments, such as:

- Business-to-business (B2B) procurements
- Business-to-government (B2G) procurements
- National, regional, and local government procurements
- Foreign procurements
- Competing to provide a product versus a service

Challengers must follow the rules and abide by (most of) the prevailing accepted business practices applicable to a targeted procurement. The incumbent may have an initial advantage of being thoroughly knowledgeable of, and capable of working in, the local environment, but the challenger must neutralize that advantage by becoming equally knowledgeable and capable through hard work, teaming, or strategic hiring.

Recent Trends

Impact of Lowest Price Technically Acceptable procurements

Due to declining national revenues and budgets, many government agencies have been increasingly conducting Lowest Price Technically Acceptable (LPTA) versus best value procurements. This significantly neutralizes several incumbent advantages because all bidders that offer a minimally acceptable technical solution are rated equally. The acceptable bidder with the lowest price is then awarded the contract. This diminishes the incumbent's advantage from its intimate knowledge of the contract requirements and places overwhelming importance on one of its biggest disadvantages—its difficulty in proposing a low price to continue performing its existing contract.

Unexpected customer in-sourcing

Another trend seen among some companies and government agencies is customer in-sourcing, when a customer converts contractor-provided services to in-house performance. This is often done in response to estimation that the customer could perform the service more cost-effectively than a contractor, but it's also sometimes done in response to dissatisfaction with an incumbent's performance. Regardless of the reason, customer in-sourcing completely eliminates the procurement opportunity, often to the surprise and disappointment of both the incumbent and any challengers.

Common Pitfalls and Misconceptions

Underestimation of incumbents' strengths

"Standard" opportunity/capture planning strategies and tactics usually aren't successful in unseating incumbents because incumbents have so many inherent advantages. Plus, it takes a significant amount of time to effectively penetrate the customer's and incumbent's organizations to identify and determine how to take advantage of the incumbent's weaknesses and execute a more complicated win strategy. Due to this longer timeframe, opportunity/capture planning and proposal costs are often higher than for new contracts. It also typically requires more effort to obtain and maintain senior management support to unseat an incumbent.

Initial opportunity/capture planning efforts might generate little or no response from an incumbent, which can lead to a false sense of security among a challenger's opportunity planning team. Incumbents may have fallen asleep at the switch, but efforts to unseat them are likely to awaken the sleeping giant. Incumbents have significant advantages and can often wage damaging and effective disinformation and reputation attack campaigns. Challengers should be prepared for a long and difficult opportunity planning and competition, despite an apparent lack of resistance in the early stages.

Summary

- When a contract is recompeted, the incumbent usually holds many competitive advantages over any challengers. However, incumbents often suffer from many self-imposed disadvantages that make them vulnerable.
- Standard opportunity/capture planning strategies and tactics usually aren't successful in unseating incumbents. It takes significant time and effort to collect enough intelligence to determine how to neutralize an incumbent's strengths and take advantage of its weaknesses.
- To unseat an incumbent, a challenger must determine how to provide better solutions (services or products) than the incumbent and at a lower or comparable price. Challengers also must provide evidence of prior success. If your organization can't identify how to do this, you should walk away from the opportunity.

Terms to Know

- Bid Decisions
- Price-to-Win
- Pricing Strategy
- Opportunity/Capture Planning

Tools and Templates

- Incumbent-Assessment-Worksheet.docx

Value Propositions

A *Value Proposition* is a statement that specifically addresses how aspects of your offer positively affect your customer's organization. Value propositions should provide customer-specific statements that describe tangible and intangible value. Tangible value is measured numerically (or quantitatively), and intangible value is measured qualitatively.

In simple terms, a value proposition offers customers something they want, and it gives them a good reason to choose you over competitors. In the executive summary in your full proposal, during any other customer interactions, you should communicate a strong value proposition that matches your client's needs and demonstrates your unique offer.

Proposal writers should articulate the value proposition in a customer-centric manner that follows the style of the proposal and writing best practices.

Best Practices

1. Sell the value based on client benefits.

Value propositions are opportunity- and customer-specific. Ideally, they should be developed collaboratively with the customer - testing it with them where possible. Value propositions go beyond theme statements by incorporating as many of the following elements as possible:

- Estimated returns to be gained from investing in your solution
- Specific timing of the benefits
- Specific timing of the costs
- Payback period
- Methods for measuring and tracking results

Individual/roles/buyers within a customer's organization may have different hot buttons, issues, and values, so you should prepare different value propositions for each. Then you should create a single, overarching summary value proposition for each opportunity.

A good value proposition considers the customer's overall needs and is sensitive to each evaluator's needs. For example, a Financial Manager may be concerned about cutting costs, whereas a Marketing Manager may be concerned with growing market share. Relevant value propositions could therefore include:

Financial Manager: "You'll realize a 10% increase in supply chain management costs within three months after implementing our Supply Excellence software."

Marketing Manager: "You'll recognize an immediate 10 to 15% increase in monthly leads over six months as a result of our proposed Reflection advertising campaign. Based on the data provided in your requirements, this will relate to a 3 to 5% increase in your current market share."

Sales expert Elmer Wheeler famously said, "Don't sell the steak; sell the sizzle." That's precisely what you try to do when explaining value propositions to your customers. You are not selling features but rather positive discriminators that deliver benefits that matter to the customer.

As a Proposal Manager, you may need to overcome colleagues' objections to creating a value proposition. They may argue that it takes too long or that you don't have enough information about the customers or your competitors. They might also argue against being specific about the benefits you offer customers for fear of overpromising. In this case, it is a good idea to develop parametrics. These are statements about what another similar customer, seeking a similar solution, has achieved using a similar solution. Parametrics within a proposal tend to be more acceptable to internal parties because the "guarantee" of achieving benefits is removed. Of course, this relies on your organization having collected the data from previous projects.

For example: "By using the proposed products, customers of ours operating in your market sector have reported an 18% to 23% increase in NPS."

According to proposal writing expert Tom Sant, the average proposal decision takes only six minutes. **Selling on value** helps organize your proposal strategy. Value grabs your customer's attention and differentiates your proposal. A good value proposition demonstrates your understanding and frames your solution in a way that matters to the buyer. In short, creating a good value proposition helps you win.

2. Link the benefits to your unique selling points.

Making your overarching value proposition the foundation of your executive summary gives evaluators a reason to select you, even before they read your proposal. Your value proposition should be unique for every sales opportunity and relate to your theme and strategy statements. Tell your customer a clear, concise, and compelling story in line with your proposal strategy. Introduce supporting win theme statements in a way that makes an impact on your customer and combine them to demonstrate that you are the best choice.

Involve your customers in developing and testing your value proposition when possible during one-on-one meetings and in other interactions. A winning value proposition will focus on benefits that matter to the client. Explain what you do that no one else does, or what you do in a different way from anyone else (i.e., the advantages of your solution). Support your claims with facts and third-party evidence (i.e., proof points). Figure 1 illustrates how discriminators and proof points combine to demonstrate value to a customer.

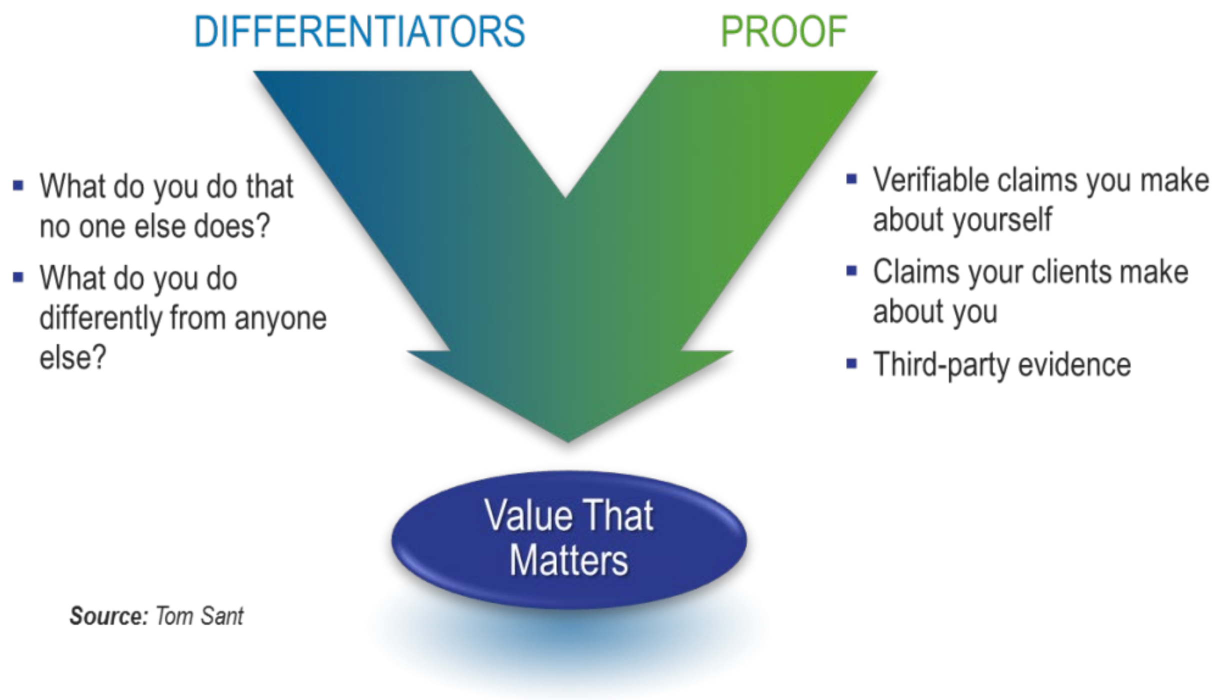


Figure 1. Building a Value Proposition. *Combine your unique claims with proof, and link these to client benefits to add real value.*

3. Use effective price-to-win methods

You don’t have to offer the lowest price to win. Value is the way the customer perceives price, and the winning proposal offers the customer more value than other options. The role of the Bid Manager or Proposal Manager is to maximize the difference between the value the client gets and the price they pay for the work.

Use price-to-win methods to arrive at a winning price. Historical databases, teaming partner knowledge, and Price-to-Win Consultants can help you do this.

See Price-to-Win

4. Quantify the payback.

A good way to demonstrate your solution's value is to quantify the return the client will get by investing in it. The return on investment (ROI) may include one of the following measures:

- **Time**. This is sometimes called the "break-even period." For example, "Our software solution will pay for itself within six months, assuming 10 users save 20 percent of the time they currently spend doing the same task manually."
- **Rate**. This is usually a percentage and is sometimes called the internal rate of return (IRR). For example, "If you spend $100 and expect a 30-percent return, then you expect $130 back."
- **Value**. This is usually measured as an amount of money. It is sometimes called net present value (NPV) or economic value added (EVA). For example, "Compared to your current costs, our solution will save you $100,000 in the first year and $200,000 per year thereafter. Over three years, you will save $500,000."

By focusing on the benefit your client wants to gain and by making some assumptions about your solution, you can usually quantify the payback in specific but simple way. This is more persuasive than making vague and unspecific claims about the value clients will gain, for example, quicker time to market, lower costs, more efficiency, etc.

5. Make it visual

Using images to explain your value proposition helps clients understand your value faster and remember it longer. It also adds emotion to persuade them. Refer to the guidelines about Graphics and Action Captions for more information.

For example, if your solution has a five-year payback and results in substantial energy savings over 30 years, you might include a bar chart showing the initial expense, when it pays for itself, the savings each year, and the total savings. Figure 2 illustrates this scenario.

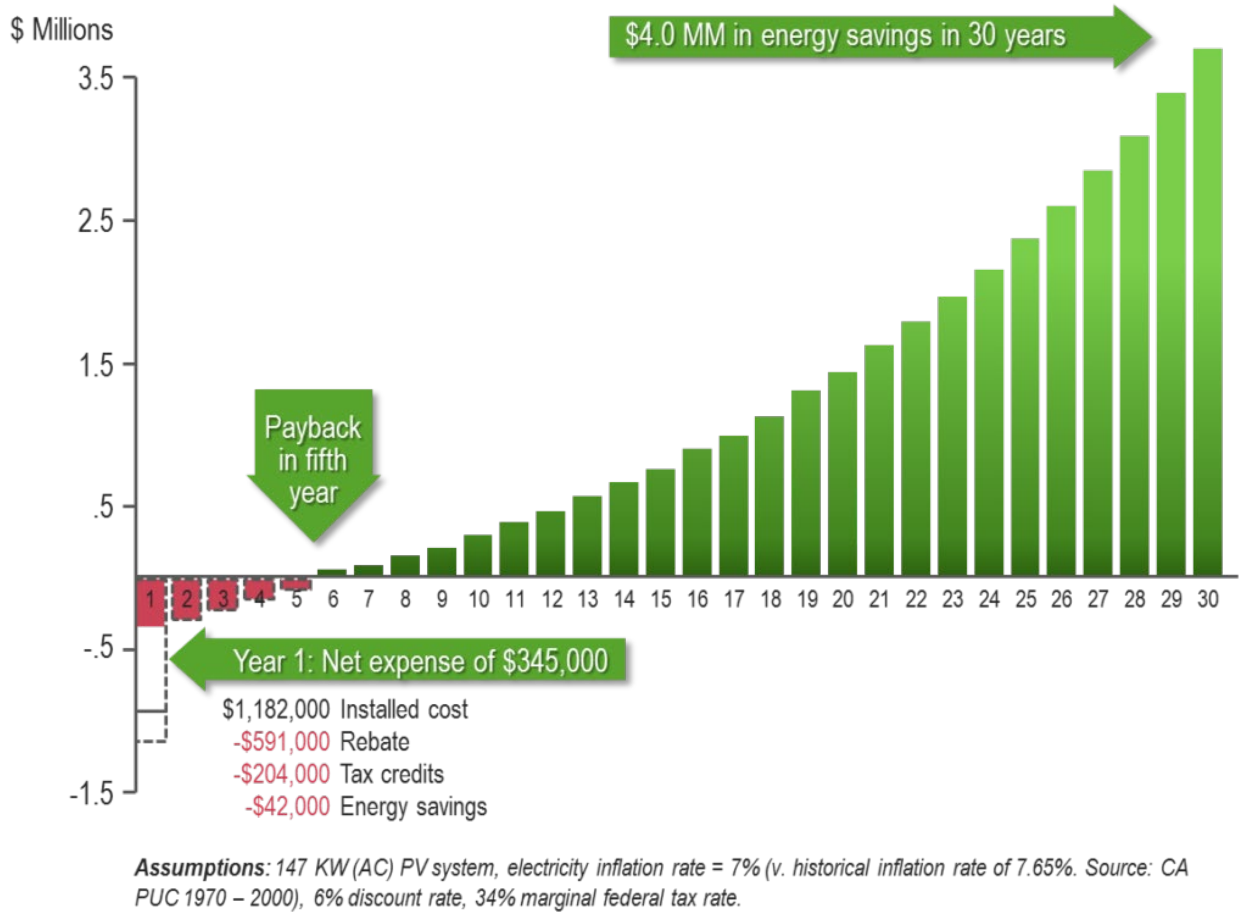


Figure 2. Showing Benefits with Visuals. *Illustrate the value you offer using graphics wherever possible*.

6. Structure your value proposition logically.

You can structure value propositions in many ways. Here are some templates and examples that you may find useful in your proposals.

Follow the *SMART* approach:

Make your value proposition *SMART*: **S**pecific, **M**easurable, **A**chievable, **R**elevant (or results-based), and **Time-sensitive**.

At APMP's 2008 International Conference, Tony Birch proposed that one way to phrase the value proposition in a proposal could be:

[Client name] **can improve** [what] [by how much/in what way] **as a result of** [doing what differently], **over** [what timescale] **for an investment of** [how much].

For example:

Acme can improve customer satisfaction by 20 percent as a result of automating service desk functions over six months for an investment of $2 million.

In the *Shipley Proposal* Guide, Larry Newman offered this example of a value proposition:

[Prospect] **will realize** [quantified business improvement] **by purchasing** [our solution] **for** [total investment cost].

Beginning [implementation date], **the improvement in** [specific business process or function] **will achieve an economic payback in** [timeframe].

We have agreed to document the delivered value by [results measurement and tracking approach].

For example:

BigCo will realize a 5-percent productivity improvement by purchasing our consulting solution for $5 million.

Beginning June 1, 2014, the improvement in factory output will achieve an economic payback in six months.

We have agreed to document the delivered value by comparing the current baseline to increased output on a monthly basis.

According to Sant, a value proposition can be presented in three parts:

- State the value the customer will get
- Identify the differentiator that will deliver that value
- Provide proof that the claim is credible

For example:

- *One important benefit of accepting this proposal is that NewCo will see a decrease in energy consumption of 15 percent to 18 percent.*
- *That decrease in energy consumption will come directly from implementing our energy optimization software, which will automatically manage your energy costs to ensure that you pay the lowest possible price 24 hours a day. The only system of its kind, the software has been proven to reduce energy bills in controlled studies.*
- *When Gee Smelting implemented our software, it saw an immediate reduction in energy costs of more than 20 percent. Similarly, Mercy Hospital reduced energy costs by 17 percent during the first year of using our software.*

You can also use the **elevator pitch** (from Crossing the Chasm by Geoffrey A. Moore):

For [target customers] **who are dissatisfied with** [the current market alternative], **our** [product name] is a [new product category] **that provides** [key problem-solving capability]. **Unlike** [the product alternative], **our product provides** [unique product features].

For example:

For mobile businesspeople who are dissatisfied with heavy laptops with a limited battery life, our MobiJob is a solar tablet that provides 24 hours of battery life after only 1 hour of ambient light. Unlike regular tablet devices, our product weighs no more than a novel, requires no accessories, fits in your briefcase, and has more processing power than the average laptop.

7. Focus on the right kind of impact

When you are looking for client benefits for your value proposition, remember that the return your client wants might not only be financial. According to Sant, clients may seek the following kinds of impact, as shown in **Figure 3**: strategic/financial, tactical/technical (operational), and political/social.

Look for measurable impact linked to your products or services and proportional to the fees you will charge. For example:

- **Strategic -** Improve working capital by 30 percent with no increase in revenue.
- **Tactical -** Automate a manually intensive aspect of the mission, requiring 10 fewer steps to complete, thereby reducing errors and saving hours of effort.
- **Political -** Improve morale by combining long-distance telephony and network offerings, thereby increasing retention by five full-time equivalent positions per year.

Figure 3. Three Kinds of Impact. *Determine the type of impact that matters most to your customer and then emphasize that impact.*

8. Address common obstacles to using value propositions

Most organizations have difficulty with value propositions. Figure 4 lists some of the common problems you might experience in your organization and offers potential solutions.

REASON VALUE PROPOSITION DEVELOPMENT CAN BE CHALLENGING	POTENTIAL SOLUTION
Legal or contracts people refuse to allow any specific statements to limit potential liability.	Develop parametric value propositions–what another similar customer has achieved by deploying the same solution. Carefully state all assumptions and conditions.
Few people understand the difference between selling on value rather than price. Value proposition development is not a disciplined concept.	Train all participants in the concept of value, rather than just price, and the development process. Provide templates to kick-start value proposition development.
A short sales cycle limits customer-bidder collaboration.	Develop reusable generic value propositions that can be tailored whenever possible rather than developed as new.
Excessive targeting of multiple opportunities limits customer-bidder collaboration.	Improve opportunity assessment and bid/no-bid milestone discipline.
The customer does not accept bidder-developed value propositions.	Find a friendly collaborator. Sell on a basis other than best value or no-bid.
Customer distrusts the bidder, or purchasing restrictions limit or bar collaboration with bidders.	Encourage Sales and Opportunity/Capture Managers to sell on a basis other than best value.

Figure 4. Overcoming the challenges of developing value propositions. *Common obstacles to effective development and use of value propositions can be overcome by considering the larger business or organizational perspective.*

Proposal professionals working in regulated government markets, where contact between the customer and bidder is limited or prohibited, can still benefit from developing value propositions. A quantified value proposition based on reasonable assumptions will be more persuasive than a vague, qualitative claim to offer best value.

Demonstrating an understanding of the customer's business can favorably distinguish your organization. With many government purchasers adopting commercial buying practices, value propositions might give you an edge.

Application in Diverse Environments

Using value propositions as the incumbent (see Winning as the Incumbent)

Many organizations find developing value propositions for recompetes challenging. This is particularly true if a formal recording of the value has not been delivered to the customer over the lifetime of the existing contract. During contract delivery, document when you complete all the proposed achievements and make sure they are quantified. This way, you will create a record that allows you to share with the customer where they were at the beginning of the process and the value you delivered.

An incumbent must also show performance improvement over the course of the contract. By determining meaningful performance measures or key performance indicators (KPI), a contractor can collect metrics that can be used for the recompete. The measures used for the recompete should:

- Be relevant to the contract
- Show performance that is important to the customer
- Reflect competence and capability
- Go beyond the minimum requirements set by the contract

A process to regularly gather and report quality and value metrics to the customer is a good practice for ensuring effective communication and soliciting feedback. If you use a standard format for regular reporting, then use that same format, which the customer will be used to seeing, in the re-compete proposal to confirm the value that has been delivered and to provide the basis for the development of new value propositions.

Using value propositions with partners

Many organizations struggle to manage the development of value propositions with partners or subcontractors. Subcontractors, in particular, may be unwilling to provide value propositions because they are working for numerous bidding organizations. However, it is important that, whatever the arrangement, the Bid Manager or Proposal Manager includes value propositions as part of the expected content.

It may be appropriate to train the partner or subcontractor in how to develop value propositions. It also may be more appropriate to request parametrics from the partner or subcontractor. This is likely to be the case when the partner or subcontractor is also working with other bidders. What has been achieved with previous customers is equally valid from your teaming partners as it is from your own organization.

Common Pitfalls and Misconceptions

Reluctance to include a value proposition

Common obstacles to using value propositions include a lack of awareness, poor information about clients or competitors, and a fear of mentioning specific results. It's important to overcome these obstacles and to include a value proposition when you bid. If you don't state your value, you limit your chances of winning.

Summary

- Failure to sell on value will cause the customer to choose on price or do nothing
- Overcome obstacles to using the value proposition to increase your chances of winning
- A value proposition offers clients something they want and gives them a good reason to choose your organization rather than your competitors
- The value proposition forms the foundation of the executive summary
- You don't have to offer the lowest price to win a deal, but you must show more value than your peers
- Quantify the payback using a measure of time, rate, or value
- Make the payback visual and add emotion by including a graphic, even when the value is intangible
- You can structure a value proposition in many ways—choose the method that works for your organization and the bid or proposal you are working on.
- Focus on the right kind of impact, which may not necessarily be financial.

Terms to Know

- Intangible Value
- Price-to-Win
- Proof Points
- SMART

- Value Proposition

Tools and Templates

- Templates-for-Writing-Value-Propositions.docx

Clear writing can differentiate your proposals from those of your competitors. Applying principles of clear writing will make your proposal easy to see, follow, and understand, making it easier for your readers to say "yes."

If your writing is clear, your readers probably won't notice—and that's a good thing. Your goal is to make readers spend less time untangling your meaning and more time reviewing your solution.

The root cause of unclear business communication is style, not form or grammar. Style represents the way we put words together at the sentence and paragraph level to express our content and perspective. This article focuses on matters of style.

For information about the form of proposals, see APMP BOK sections on Proposal Organization, Proactive Proposals, and Executive Summaries.

Writing Clearly

Best Practices

1. Storytelling

In Style: *Toward Clarity and Grace*, Joseph Williams says, "Storytelling is fundamental to human behavior. No other form of prose can communicate large amounts of information so quickly and persuasively." We tell stories through characters and their actions. Telling stories is apt for proposals because they are narratives about what one company plans to do for another and what it has done for other similar companies.

Six principles for effective storytelling

There are six principles that will help you bring storytelling to your proposals:

1. Build emotion and connection with the audience by showing you fully understand their current situation and their hot buttons

2. Keep their attention—check on the level of detail you are providing (not too much, not too light)
3. Ensure your story is easy to understand and will be memorable for the reader
4. Believe in what you're selling—show passion and positivity in your story
5. Demonstrate a clear and simple journey to the outputs your customer wants to achieve
6. Highlight why you are best placed to take your customer on this journey so you differentiate from your competition

Also, test your story with the S.T.A.R. approach:

- Something
- They'll
- Always
- Remember

Is the story in your proposal doing this?

Storytelling tips

Storytelling is an excellent means of relaying your story to your potential customer. When it comes to storytelling, don't just tell simple stories about yourself and your company. Make sure you involve the customer—try telling their story and incorporating yours.

Brand stories

To tell your story, determine your goal first, then build up your messages. You want to encourage people to buy now, so you need a more strategic approach that mainly responds to your customer's needs.

Where regular stories consist of a beginning (introduction), middle (explanation), and end (happily ever after?), proposal stories consist of:

- Life before: What your customer struggles with
- Tipping moment: Explain what your customer needs to do to overcome the struggles (use features and benefits related to customer struggles to describe your product)
- Life after: Explain what life after overcoming the struggles will be like (use value propositions)

For example:

"You've told us that reducing the cost of your field operations is a key target for your business over the next 12 months. Money saved here could be diverted to developing new products to ensure you keep ahead of the new competitors in your market.

We've worked with many organizations facing similar problems. For example, Typhoon Electronics' traditional engineering team's distribution and spares management systems were leading to inefficiencies, such as employees being sent to a site without the right parts.

By implementing our latest Field Support System (FSS), Typhoon's operational management team has been able to take more control of their operations, while FSS's automated controls prevent work from being allocated without the right prerequisites, such as the correct part. The result has been an 11 percent cost improvement within the first 6 months and a further 8 percent within the first year. At the same time, errors in scheduling were reduced by 16 percent. Typhoon estimates the total cost savings to be more than 25 percent over 12 months, which equates to a return on investment of more than 80 percent.

By implementing FSS in your operations, we'd expect to see similar levels of improvement and return. We recommend the following six-stage approach to implementing FSS:

Stage one: ...

Types of stories

There are three types of stories you can tell your customer:

- The Big Story: Why you, not the competition. It is well structured and contains all story elements (features, benefits, discriminators, value propositions, visuals, etc.)
- The Back Story: The story behind your company—the inner workings, conduct, and demeanor of your company
- Stories within the Story: Anecdotes that add to the context or connection between you and the customer. This type of story is very useful for pitches.

Benefits of storytelling

A few benefits of storytelling are:

- Stories help the customer relate more quickly to your product
- Stories create fluency in the proposal and can glue separate parts together

Stories make customers more easily put their trust in your products because you can proudly make statements about them

2. Use active voice.

Because proposals are action documents, use human subjects whenever possible. Customers pay for results, so our proposals should actively express how we perform for them.

Instead of: Design decisions on our products were made based on user's specifications.

Write: Our engineers designed our products with your users in mind.

To keep roles clear and actions clearly defined, write mainly in active voice. Sentences in active voice place the agent of the action as the subject and the action itself as the verb, followed by the object or the thing changed by the action.

In passive voice sentences, it's the reverse: The subject is the goal of the action, and the action is partially obscured (a form of the verb "to be" precedes a past participle form of the main verb). The true subject is often the object of the preposition "by." Active voice is preferable because it is the voice of good stories—direct and concise.

Word processing programs usually have a built-in readability statistics tool that can tell you the percentage of passive sentences in your writing. Use the tool to convert passive sentences into active ones.

Instead of: The inspection of the facility was made by OSHA representatives.

Write: OSHA representatives inspected the facility.

Passive voice is preferable in two situations, however:

- When your audience doesn't need to know who is performing the action. Be aware, however, that some use passive voice to avoid responsibility.
- When you need to maintain a consistent string of subjects in a paragraph and passive voice is the only way to do so.

Because action drives stories, use strong, active verbs to avoid abstractions. Technical content often hides complex actions in the form of nominalizations or verbs and adverbs that have been converted to nouns. Look for the action verb behind the nouns that end in –tion and –sion. (For additional endings and tips for finding and converting nominalizations, see the Fix Nominalizations guide).

Instead of: There is a need for additional examination of the code problem.

Write: The programmer must examine the code more closely.

2. Write like you talk

Every reader, even a technical expert, appreciates clarity. Use the same style of English you use in conversation to make your proposals more open and accessible to a wide range of audiences.

Some readability statistics tools assess your writing's readability on two scales: the Flesch Reading Ease and Flesch-Kincaid grade level. These scores indicate how easy or difficult your proposal is to read. Aim for a Flesch Reading Ease score of higher than 60 (the higher the score, the easier to read) and a Flesch-Kincaid reading level of 7 or 8 (for grade level, lower is better).

Use simple words with precision. Opt for briefer, more common words when meaning is not compromised. The following two sentences mean the same thing, but the second one, which uses shorter words, is easier to read and understand.

Instead of: We will ***utilize*** Six Sigma ***methodology*** to ensure end-to-end quality.

Write: We will ***use*** Six Sigma ***methods*** to ensure end-to-end quality.

Use jargon only when it's clearly to your advantage to do so. Technical or professional jargon can sometimes demonstrate mastery of a subject and gain a technical reader's trust. However, because a proposal is usually assessed by people with different degrees of technical knowledge, be sure to define any necessary jargon you use either parenthetically after the first use of the term or by a link to a glossary definition. The best approach is to use nontechnical language, unless you are writing to technical experts only.

Build intimacy with your reader through personal pronouns. The style of business communications is increasingly less formal. Using third-person pronouns and collective nouns (for instance, ABC Company instead of we or us; customer instead of you) puts distance between you and your reader, yet implies no greater degree of objectivity. Using the "you attitude" (directly addressing your reader in the second person) is brief, more closely resembles the way people talk, and will help you avoid passive voice.

Use contractions as needed to create an informal, friendly tone. If you're writing to someone you do not know or someone you know is more traditional, avoid contractions. If you want to create a tone of academic objectivity, avoid contractions. If you want a familiar, personal tone to your proposal—say, if you are writing on behalf of a salesperson—contractions help you mimic spoken English. Let your reader be your guide.

Use a variety of punctuation to engage readers. While punctuation is more a matter of grammar than style, the following two examples show how punctuation brings emphasis and cohesion to your content. The colon and dash are both great tools for emphasizing the importance of content that follows them in a sentence. Use them after complete sentences to point to a single word, a list, another complete sentence, or a series of complete sentences. How do you choose between them? Use the dash when your tone is informal.

Instead of: We detected problems in the following areas: accounts receivable, accounts payable, and debit entries.

Write: We found serious problems—in accounts receivable and payable and in debit entries.

Semicolons help join two or more independent clauses when you want to show that they are closely related without having to overtly state that they are.

Instead of: The new console has more features. However, the new console does require a separate power supply.

Write: The new console has more features; however, it requires a separate power supply.

3. Write tight

Clear writing is content that respects your readers' time by providing everything that is necessary in the briefest space possible.

According to *Microstyle: The Art of Writing Small*, the growth of information and knowledge makes human attention the scarcest commodity, and readers "scan, skim, and screen" to conserve their attention for the messages that deserve it most. Following are eight techniques for writing tight—three at the paragraph level and five at the sentence level:

1. State your idea up front and make sure everything else relates
2. Keep paragraphs short
3. Tie your sentences together to make unified paragraphs
4. Use only the words your readers need
5. Watch out for long strings of nouns in succession, or "noun stacks."
6. Use concrete images and precise measures
7. Be consistent when using technical terms
8. Stay positive
9. Avoid tautology

1. State your idea up front and make sure everything else relates. Clear writing lets readers know quickly and clearly why they need to read what you've written. This applies at every level of your proposal—document, section, and paragraph. In the transmittal letter and executive summary, clearly state your purpose. In each section's introduction, state how that section relates to your overall purpose. In every paragraph, follow the topic/comment/point pattern of successful technical prose:

- ***State your sole topic for your paragraph in the first sentence.*** Do not mix messages by loading multiple ideas into a single paragraph. The topic sentence establishes the topic for that paragraph alone.
- ***Support your topic with comments.*** Comments are the "proofs" in our proposals, and they should solely support the topic you set in sentence one. While there is no limit to the number of comments you can include, the more comments you use, the more likely your readers will lose your thread.
- ***Provide a point statement for a powerful takeaway.*** In the final sentence, remind your readers why this topic is important to them. In proposals, this is a great place to reinforce win themes and differentiate your solution from that of your competitors.

To see a template that uses the topic/comment/point structure to respond to interleaved Q&A RFPs, see the RFP Q&A Response Template.

2. Keep paragraphs short. Shorter paragraphs are easier to read. Shorter paragraphs are almost like dialogue and reinforce a conversational tone, especially in nontechnical sections of a proposal. Even in-depth responses can be made more reader friendly by creating shorter paragraphs based on the various levels of ideas you need to present.

The topic/comment/point structure supports a short paragraph strategy and makes it easier for your readers to follow your line of argument. You may even separate the point statement from the main paragraph to make the paragraph shorter and the point more emphatic.

Instead of: We approach projects of this scope through a defined program management process. In the initial phase, the ABC Company team identifies the processes and tools required to implement and validate the project. We then systematically develop a resource plan and roadmap to maximize the potential for success through end-to-end management of the deployment and the associated processes and tools. As a result, you will have the defined strategy and experienced resources to help ensure a successful implementation.

Write: We approach projects of this scope through a defined program management process. In the initial phase, our team will identify the processes and tools we need to implement and validate the project. In phase 2, we'll develop a resource plan and roadmap that ensures we deploy the associated processes and tools in a controlled manner.

Because we follow this two-phased approach, you will have the defined strategy and experienced resources to help ensure a successful implementation.

3. Tie your sentences together to make unified paragraphs. Readers lose their way in paragraphs for two main reasons:

- They receive new information before they know how it relates to information they already know
- They lose track of the main topic of the paragraph because the subjects of each sentence vary

You can improve the cohesion of your paragraphs by placing new information after old information. This allows you to create cohesion, building on what your readers have just learned and using it as a springboard to the next round of new information.

Instead of: You strive to be the best wireless company in the world. To achieve consistently high levels of customer service, your internal processes and technologies must perform reliably.

Write: You strive to be the best wireless company in the world. Being the best means you must delight your customers consistently. Your consistency depends on support technologies that are "always on."

You can keep your readers aligned with your paragraph topic by ensuring that each sentence starts with a reference to that topic, preferably in the subject of each sentence.

Instead of: Your Personal Identification Number (PIN) should arrive via email within one business day after registration. ABC Company currently does not have the capability to permit members to choose personalized PINs. The company selected a four-digit number for your PIN.

Write: Your Personal Identification Number (PIN) should arrive via email within one business day after you register. Your PIN is a four-digit number that ABC Company selected. Your PIN cannot be personalized at this time.

Finally, tie your sentences to others using transitions (words, phrases, and sentences that connect one idea or sentence to another). Transitions specify relationships of time, cause and effect, space, addition, comparison, and contrast. Place them at or near the beginning of a sentence. A transition after the verb weakens the effect of the transition and sounds awkward.

Instead of: The engineers failed to validate the findings with field operations. The department heads asked the chief engineer to retest the procedure as a result.

Write: The engineers failed to validate the findings with field operations. As a result, the department heads asked the chief engineer to retest the procedure.

4. Use only the words your readers need. Respect your readers' time by eliminating redundant and unnecessary words. Redundancy occurs when you use words or phrases that unnecessarily repeat the meaning of other words in the sentence.

Instead of: This new feature will completely eliminate all errors for a true and accurate count.

Write: This new feature will eliminate errors for an accurate count.

Wordy phrases add girth to writing with no added value. With proposals, that can be the difference between meeting page counts and not.

INSTEAD OF	WRITE
Take into consideration	Consider
In order to	To
Has the capacity for	Can
In the course of	During
In the process of	While
Owing to the fact that	Because
In consequence of	Because
With the aim of	To
Regarding	About
At the current time	Now
Whilst	While
Utilize	Use
Each and every	All
With the exception of	Except
Give consideration to	Consider

5. Watch out for long strings of nouns in succession, or "noun stacks." When you use two or more nouns to modify another noun, you force readers to read through the string multiple times to understand which words modify the main noun. This creates ambiguity and slows down readers.

Instead of: Provide an operations human resource recommendations "blueprint" process that will define and optimize the Operations Support Model structure to meet target state requirements.

Write: For our human resources team; we recommend a "blueprint" that will define and optimize their support model to meet targets required by the state.

6. Use concrete images and precise measures. Proposals are a genre of technical communication, and technical writing is meant to be precise. A persuasive discourse based on logic depends on concrete proofs, so use numbers over indefinite amounts.

Instead of: some/many/few.

Write: exact amounts and measures.

7. Be consistent when using technical terms. Readers of technical documents get confused when you use a synonym or alternate word when referring to technical concepts, instructions, or equipment. To minimize a reader's frustration or misinterpretation, make a list of your technical terms in your style sheet and stick to those versions throughout your proposal.

Instead of: using several synonyms for screen like monitor or terminal.

Write: the most accepted term, like screen, in every instance.

8. Stay positive. Whenever possible, tell your readers what something is rather than what it's not. Readers comprehend positive statements more easily and quickly than negative statements. If you place several negative statements within a paragraph, your reader will struggle to comprehend your meaning.

Instead of: Do not discontinue running diagnostics until none of the errors are present.

Write: Continue to run diagnostics until all errors are eliminated.

9. Avoid tautology

This is a common situation where the writer says the same thing twice in different words (e.g., they arrived one after the other in succession). Other common tautology examples to look out for and edit out of your content include:

extremely unique: unique

advance warning: warning

unexpected surprise: surprise

consensus of opinion: consensus

new initiative: initiative

exit from: exit

meet with: meet

on a daily/weekly/monthly basis: daily/weekly/monthly

4. Show your document's structure

Because a proposal evaluator often looks for ways to eliminate bidders, creating the most accessible and functional proposal possible can be part of your win strategy. When you facilitate readers' access to your content, you make it easier for them to choose your solution. Make it easier for readers of your proposal to choose your solution, by considering these five techniques:

Write informative headings. Knowing that your readers scan, skim, and screen your proposals, write headings that describe the contents of every section and subsection. Consider two guidelines for writing informative headings:

- **Avoid single-word headings**. Headings like Recommendation and Finances may be too vague or generic to keep your busy reader from having to read every word that follows.
- **Use a parallel grammatical structure for headings within a hierarchical level.** This is a subtle way to let readers know where they are in your proposal. Some options for heading styles include:

STYLE	EXAMPLE
Verb phrase	Troubleshooting Issues in Your Custom Network
Clause	Why You Need Custom Troubleshooting Procedures
Apposition	Troubleshooting: Why we customize our procedures.
Theme	The Need for Custom Troubleshooting Procedures
Question	Why Do You Need Customized Troubleshooting Procedures?

Apply numbered and bulleted lists appropriately. Numbered and bulleted lists are easy ways to open up your documents for easy reading and absorption:

- **Build numbered lists to highlight items in a sequence**. Use numbered lists for procedures, step-by-step instructions, and references to numbered components.
- **Build bulleted lists to highlight components or elements when no sequential order is evident.** For emphasis, place your most important bullet list items in the first, second, or last positions.
- **Use hanging indents.** Wrapping text around the bullet or number reduces the eye's ability to separate the items listed.
- **Limit the number of items in your lists.** Limit the number of items in your lists to between three and seven. If you have more items to display and cannot exclude any, group them into labeled categories (again, between three and seven items, optimally).

Transition between sections. Just as readers can get lost within paragraphs, they can easily lose interest or the thread of your message from section to section and volume to volume.

Radio shows the transition between segments by "packaging" (providing a teaser) for an upcoming topic. You can use a similar technique to draw your readers into the next section of your proposal. Use transitions at the end of a section to pre-sell the content in the following section.

On the flip side, provide a "landing pad" of established information for your readers as you introduce the section that follows:

- Use cause and effect, place, addition, and comparison or contrast transitions between sections, as you would between sentences
- Pull in previous takeaways that are pertinent to this new line of thought
- Preview an arrangement similar to that of the previous section
- Recap prior conclusions
- Recast themes that you established in your executive summary in a new light

Describe ideas graphically. Use graphics to create a spatial organization for sections of content. Content plans use this technique to help contributors build content by describing what they see in the graphic. Moving left to right, top to bottom, or through a flow illustrated in the image can provide both visual and textual reinforcement for your ideas. When you apply this technique, always refer directly to the graphic in text so that readers can quickly reference the image, or even choose which delivery method, text or graphic, that they prefer.

Build a familiar schema. Most proactive proposals are structured documents with standard major sections, beginning with a summary then describing the client's current situation, your company's solution, the cost, and the implementation plan. You should aim to establish a repeatable model for all your unsolicited proposals so readers who receive the second, third, and fourth proposal will be "trained" in what to expect and where to find what they seek.

Building a schema is more difficult when the customer dictates how the proposal should be organized. Some would say it's not necessary, because the customer who released the RFP will demand you respond in the schema they prefer.

However, there is a way to leverage your proven organizational schemas within the context of a customer's dictated structure. When your customer presents an RFP in an interleaved Q&A format, build a schema that you reinforce with each subsequent answer. AT&T uses a five-part schema to build reusable Q&A knowledge bases and to condition reviewers to assess their responses (see the RFP Q&A Response Template).

5. Plan to revise

Always include ample revision time and cycles for your proposals to reduce overall cost, test the validity of your ideas, and ensure you are writing ethically. As you review your work, apply the following tips:

Use a style sheet to present terms consistently. Most large companies have a corporate-style reference for all types of business writing. If yours does not, use style guides such as the AP Stylebook or The Chicago Manual of Style. For your projects, create a standard style sheet that denotes the preferred:

- Usage (e.g., data as a plural noun)
- Punctuation (e.g., comma before and in every list)
- Capitalization (e.g., MB versus mb)
- Industry acronyms/jargon (e.g., MFJ—Modified Final Judgment)

Schedule downtime between writing and editing. A waiting period away from the document will allow you to find errors and validate ideas more easily and without emotional baggage.

Have your peers edit your work to ensure high-quality content, style, and grammar. If you are part of a proposal team, ask your peers to review your work and offer to do the same for them. Look for opportunities for substantive, grammatical, and general stylistic improvement.

Use functional reviews to ensure accuracy, persuasiveness, and appropriateness. These are a standard approach to revision, using objective reviewers not linked directly to the proposal in progress. For a thorough discussion of functional reviews, see Review Management.

These reviews should be testing the writers' drafts, ideally on an iterative basis during the proposal when time allows. Writers should also self-assess against the established writing style and guidelines for the opportunity (see Proposal Writing Guides). These assessments should include the following principles:

- Optimize sentence length: maximum 12 to 15 words per sentence
- Avoid "I": Apart from forewords, cover letters, or direct comments, keep "I" out of it
- Follow the left-hand rule: To demonstrate client focus, the start of each paragraph should include more references to the client than your organization. Lead your answers with the reader's needs before explaining why you offer the best solution.
- Use client-centric writing: Great proposals mention the client (using their name or "you(r)(s)") more than they mention your organization name (or "we," "us," "our")
- Answer the question fully: A common complaint from evaluators is failure to respond to the specific questions and requirements. Answer the question and make sure the content is complete and comprehensive—and keep to the point.
- Use the "so what?" test: All answers need to be clear on the benefits to the client. Ask, "So what does it mean to the client?" State the benefit. Don't leave it to them to work it out. And the more tangible the benefit, the more impactful and memorable it will be for your customer.
- Provide complete answers: Don't redirect the reader to other material (other answers, appendices, separate brochures, websites). Great proposal responses stand alone—they make it easy for the reader to follow the story and find the relevant information.
- Use active headings: When you use an active heading like "Delivering on time" rather than "Project plan," you tell a summary story when your reader scans the document.
- Use bold statements: Avoid using "fudge" statements, such as, "We think …," "We believe …," or "According to our understanding of your requirements …," unless absolutely necessary to avoid commercial risk
- Keep the document free of clichés and jargon: Use acronyms sparingly and explain terms in full on first use. (Not all evaluators may have a technical background!)
- Prove it: Highlight differentiation from competitors using case studies, client references, testimonies, analyst reports, press comments, and benchmarking data, but don't ever directly discredit the competition
- Picture it: Where relevant, use appropriate graphics to illustrate your point.

Application in Diverse Environments

Adapt as needed to your readers' language and culture

Clear writing is good writing in any language. The principles of clear writing presented here—reducing redundant phrases, inconsistent terms, dense and complex paragraphs with hidden content, and long, unwieldy phrasing—are improvements to communication in any language.

Because many global companies require proposals in English, clear content is an absolute requirement for a reader for whom English is a second language. Clear content is also easier for locals or translation services to translate when a native-language version of a proposal is required. While a perfectly clear source document cannot ensure a clear translation, it reduces the chances of misinterpretation and makes the process faster and less time-consuming.

As you provide content to readers from other countries, be aware of the differences in spelling, punctuation, usage, and style between their type of English and yours. For instance, if you are in the United States and are writing to an audience in the United Kingdom, spelling and usage are potential pitfalls for reader acceptance. Two solutions:

- In your word processing program, change your language to the preferred type of English (e.g., British English, American English). Be sure to proof the content afterward to ensure that spelling and usage rules have been correctly applied.
- If this built-in capability is not sufficient for your subject or audience, create and run a macro to catch the words in the form of English you use that differ from those of your audience.

Remember that the cultures of international readers shape their communication styles, just as your culture shapes your own style. Neither style is inherently wrong nor right, but failing to adjust your style to match that of your readers will build a barrier that the best technical solution may not be able to overcome. Learn as much as you can about your international audience's expectations and culture to prevent miscommunication.

Check to see what, if any, style guidelines your employer recommends from a branding perspective. Some organizations have their own writing guide on overall written communications. These guides could include lists of prohibited words and phrases that put vendors at risk.

Use plain language in communications with the Government.

In the mid-1990s, a group of U.S. government employees created the "plain language" movement. Their goal was to ensure that government documents were written in a way that audiences would understand them the first time they were read.

Proponents of plain language focus on five major aspects of writing. The most important is the audience: "Language that is plain to one set of readers may not be plain to others." They consider written material to be in plain language if an audience can "find what they need, understand what they find, and use what they find to meet their needs." This movement has obvious lessons for writers of government proposals: These very employees may be people assessing our work. If we want to understand our audience, we must follow the guidelines they set for themselves.

Recent Trends

Proposals in the Internet age

Proposals and RFP responses have changed in the past 30 years, but many haven't kept up with broad trends in communication. Presentation matters now more than ever before. A well-designed proposal must demonstrate to your customers that you value them highly—that you want to get their attention, their respect, and their business.

Getting customers' attention is difficult, and presentation is the key to success. Your customers see brilliantly designed communications via YouTube, presentation websites, and even sidebar ads on Google. The proposals of tomorrow have to become more like the communications that we see today on the web.

Using multimedia to enhance or even transmit your proposals is a crucial area of development for proposal professionals, but tried-and-true principles of writing clearly still apply. Multimedia tells stories—briefly, personally, and directly. Multimedia shows more than it tells. Multimedia gets to the point and leaves a lasting impression. Clear writing supports all of these goals.

Online proposals and their implications

The proliferation of online proposal submissions has increased the need for clear writing. Being able to respond in an instant to an online opportunity requires that proposal professionals have instant access to their content via knowledge bases and the ability to transmit that knowledge in the right amounts and formats to the buyer or the vendor managing the engagement.

But online auction environments set strict limitations for content and format. They also constrain the techniques bidders can use to differentiate their solutions from those of their competitors.

Until bidders, buyers, and facilitators recognize a set of proposal standards, online procurements will be saddled with the same inefficiencies faced in the traditional proposal environment, such as difficulty identifying requirements, poorly structured requests, conflicting instructions, ambiguous interfaces, lack of standard language, software interoperability, and unnecessarily complex workflows.

Common Pitfalls and Misconceptions

Using proposals as technical references

Many proposal contributors and even some proposal managers think that proposal content must be the dense, complex, and jargon-ridden prose of technical manuals because technical experts compose the primary audience or are the key influencers for decisions.

In most cases, this is simply not so. Along with these technical experts, financial experts, managerial experts, process and quality experts, and executives also read some or all of many proposals. Any reader with expertise outside the immediate content at hand is a novice.

Furthermore, research indicates that technical readers appreciate clear writing as much as novices, because:

- ***Clear writing doesn't "dumb down" content.*** It specifies who does what, shows how technology works and fits into a workplace, and provides guides and definitions for terms outside any reader's expertise.
- ***Clear writing clarifies ideas***. Clear writing eliminates the mystery of jargon, the ambiguous actions hidden within nominalizations, the shorthand of conceptual shortcuts, and the content density of stacked nouns so that ideas stand on their merits and become assessable to all who need to understand them.

Writing proposals in objective, formal language

Many business professionals think that proposals, because they are official business documents and precursors to contracts, should be written in an objective and formal—that is, legalistic—style. Yet proposals are primarily sales documents. Selling is interpersonal, from one representative to another. Your proposal is a primary communication medium for you to solidify your offer to a buyer through mutual agreement.

In that sense, proposals are written arguments—appeals to gain a buyer's agreement but also to enlist that buyer in solving a problem. Attempts to downplay the interpersonal relationship, the sense of people helping people, will only serve to diminish cooperation and trust, which are hallmarks of successful written arguments.

Summary

- Follow the principles of clear writing and plain language to improve your chances of winning business.
- Understand that all readers appreciate clear writing, even technical experts, keeping in mind that teams of analysts from a variety of backgrounds and expertise assess proposals.
- Investigate ways to incorporate modern multimedia techniques (video, animation, interactive demonstrations) to keep up with communication trends.
- Analyze and understand your readers so you can anticipate their needs, write to their expectations, and accommodate their communication and cultural preferences.
- Revise your work to reduce the cost of rework, to test the validity of your ideas revealed by plain language, and to ensure the integrity of your content.

Terms to Know

Active/Passive Voice

Sentences written in active voice have a clear subject and verb. They make it clear who does what. Passive-voice sentences, in contrast, are considered 'weaker', because the subject receives the action instead of performing it. Passive sentences usually contain a form of the verb 'to be'. Here is an example: Passive: Risks will be managed by the Project Manager. Active: The Project Manager will manage risks.

Nominalization

A noun derived from a verb or an adjective, often with a suffix like -tion, -ment, -ance, -ity, and others. These words often make text sound wordy and difficult to understand and should be avoided when possible.

Noun Stack

Two or more nouns that modify another noun, such as "business development data library." Noun stacks are hard to read and may cause ambiguity.

Style Sheet

A set of standards developed specifically for a particular proposal that editors and writers can use to ensure consistency in style, grammar, terminology, and mechanics, such as naming conventions, abbreviations, acronyms, response tone, and approach. Design style sheets are developed at five levels. These levels are line level, paragraph level, page level, graphics level, and document level. Synonyms: Template,Style Guide

Transitions

Words, phrases, and even sentences that connect one idea or sentence to another. Transitions indicate relationships of time, cause and effect, space, addition, comparison, and contrast. One way to write effective transitions is to link new information with information a reader already knows. This creates cohesion between paragraphs.

Tools and Templates

- Fix-Nominalizations.docx
- Fix-Passive-Voice.docx
- Fix-Redundant-Pairs.docx
- Plain-Language-Checklist.docx
- RFP-QA-Response-Template.docx
- Writing-Style-Checklist.docx