

How to Prepare a Proposal

ISSUE 39
MARCH 2009

One of the most fascinating things I do is to basically turn over rocks and see what's underneath. By this I mean I take a close, hopefully fresh, look at something that people do all the time, and help them see how they can do it better, in ways they perhaps haven't thought of. This month I'm going to take a look at the lowly proposal. Having both prepared and reviewed more proposals than I care to remember, I think I have something to offer on this subject.

What I'm writing about here is not an RFP response. That's a totally different animal. In those situations, you're typically told what information you have to provide, the questions you have to answer, and so on. Sometimes, you'll even be told what typeface you need to use, what kind of paper, and so on. Much of what you're preparing isn't really under your control.

A proposal is different. A proposal is written with far less direction, if it's written with any. When you write a proposal, you are basically starting from a blank sheet of paper, and putting together whatever you think will work.



Given all this, the very first recommendation I have is that if the project is of any importance at all, you hire a real designer, and a real copywriter to at least review it, and ideally, help conceptualize it. To understand the reason for this, you have to take a new look at what a proposal actually is, and does.

THE PETER DARLING
NEWSLETTER

ISSUE 39
MARCH 2009

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PROPOSAL

Someone reading a proposal basically has two concerns. The first is, “Can/will they do what they say they can/will?” The second is, of course, “How much will it cost?” A great deal of this isn’t a logical conclusion, but the result of fast, intuitive evaluation. Or, to put it in English, someone reading your proposal will form a powerful impression of you, your company and your offering just based on how the damn thing looks. That’s what designers do.

A good designer can make a proposal look polished, expert and contemporary. They can make your company and your offering look expert, elegant and desirable. They can work wonders. They really can. If you want an example of this, take a look at some of the proposals I’ve done for clients, [here](#).

The second thing you need to do is reconsider the way your proposal is physically constructed. Virtually every proposal I’ve ever seen is printed on regular 8 ½ x 11 paper. Sometimes it’s stapled in the corner, and sometimes, if it’s really a big deal, it’ll be bound along the left-hand edge.

You can do a LOT better than that. As an example, you can create a magazine. To do this, once the proposal’s prepared, you print it on 11 x 17 glossy stock, on both sides, two proposal pages to a side. In other words, the stock is 17 inches wide and 11 high, and has room for two 8 ½ x 11 proposal pages on each side. You have to do some fairly tricky renumbering of the proposal pages, but in the end, a 40-page proposal becomes ten sheets of this stuff. You then pile them up, fold them down the middle, and center-staple them. You use extra-heavy stock for the cover, and what you get, basically, is your proposal as a magazine.

Any Kinko’s store can do this. It looks like a million bucks – the design and any illustration reproduce beautifully, it’s much more compact than a proposal prepared the usual way, and the center-staple approach is definitely attention-getting. The point here is not necessarily that this center-staple approach is the *ne plus ultra*. The point is that you can do an awful lot besides simply printing stuff on an 8 ½ x 11 stack of paper. Could you:

- Prepare a video?
- Do it in Powerpoint presentation?
- Create and bind a custom book (check out www.mementopress for this)?
- Deliver the proposal on a CD, or on a thumb drive?
- Build a web site?

The third element of a really great proposal is illustration. Some proposals do contain images of the team that’s actually going to do the work. But very few proposals include photography, or any images besides the occasional graph. I have seen law firm proposals that are over a hundred pages long, without a single illustration or photo to break up an avalanche of copy.

Reading is fatiguing. Designers use white space, various design elements, and layout to make it easier. Photography is another aspect of this. As an example, a client of mine once did a proposal for a company that manufactured, among other things, washing

machines. A water theme was used in illustrations throughout the proposal, including an image of a whirlpool, of waves, of calm water, and so on. The illustrations added visual interest to what was otherwise a fairly dry document.

The point of all of this is that if you're pitching several hundred thousand dollars worth of business, it's worth an investment of a few thousand more to make it look really good. Taking these pains dramatically increases the reader's perception of your services and your value, and delivers a powerful branding message in a way that pure copy never could.

Which is not to say, of course, that the copy doesn't matter. It does – a lot. And this is where a lot of proposal writers fall down. There are essentially three different perspectives from which to think about the writing in your proposal – let's call them the small, medium and large.

Small is basically careful proofreading. In theory, this happens with every proposal, but unfortunately, it's usually done by the people who wrote the proposal, who are, to say the least, a little biased, and a little jaded. After they've gone through the copy they wrote for the tenth time, they're usually pretty well burned out. They start missing things.

Even small typographical errors have an enormous impact. Whenever you write anything, you're basically telling a story. The key to any good story is that the reader forgets it's a story – they get drawn into it. Typos interrupt this. They remind the reader that what they're reading is just a document, and the impact of the narrative is lost, at least momentarily and sometimes permanently. Think of typos as the written equivalent of tasting sand in your asparagus, or of a dripping faucet that keeps you awake at night. They're not small things.

So, if you can, build an extra day or two into your schedule, and hire a professional proofreader. First, they will do a much better job than you, or anyone on your team could. And second, they'll pick up things that you will completely miss, and correct details that will escape you. For example, if you abbreviate a state name one way, say, "CA" then you should consistently use that same approach throughout the document. Having a good proofreader go through your proposals is sometimes kind of embarrassing. It's absolutely appalling what they pick up that you miss. But it makes the end result better.

Medium is just plain editing. The editors' job is not to find grammatical errors like a proofreader does. Instead, it's to make the document read well, which means two things – making sure the writing is good, and making sure the ideas flow and connect well. Good writing is something I've addressed in a previous newsletter. Are the sentences short and straightforward? Are they free of jargon and B.S.? Do they have the right tone? Do they have impact? Are they readable? And so on.

Making sure the ideas in the proposal flow and connect is the third, large kind of editing. This is where cutting and pasting happens, or rearrangement of paragraphs or sections. When most people write something like a proposal, they completely forget that what seems incredibly obvious and clear to them is not necessarily obvious and clear to the reader. Particularly if the proposal is in an area that the

author knows much better than the reader, it's horribly easy to write something where the ideas you express jump all over the place, without any clear structure, transitions or connection between one idea and the next. This kind of thing is often a side effect of the proposal being written by someone smart – their heads are full of ideas that seem obvious to them, but in fact aren't obvious at all to someone else. A good editor can spot and fix this.

It's also crucially important to base the proposal on the recipient rather than on you. Far too many firms – in fact, virtually all of them – believe that the point of a proposal is to introduce their firm to the reader. Consequently, they stuff it with facts about themselves, the history of the firm, biographies of the team and so on.

This is often all necessary, but it shouldn't be the focus of the proposal. The focus, rather, should be on the reader – their situation, their history, their challenges and how your proposed solution will help them. A good model for this is Neil Rackham's SPIN selling paradigm. SPIN is an acronym for "Situation, Problem, Implications, Need."

A proposal should begin with some kind of overview of the prospect, including such basics as the number of employees, their annual revenues, their competitors, product line, headquarters and so on. This sets the stage for everything else, and it demonstrates to the reader that you've done your homework. It also demonstrates that you're thinking about *them*, and *their* challenges, which is what they would hire you for, right?

The proposal should next describe the problems the prospect is up against, or failing that, their objectives. Do they want to grow market share, avoid litigation costs, defend a patent, what? From there, you can segue into the consequences and costs of the problem. What kind of damage is this problem causing? What does it cost? What will happen if it continues?

Need, the final piece of this puzzle, is where you introduce your solution. Strategic Selling, another sales methodology, describes this as "creating a vision." Here you introduce what you propose to do for the prospect, and even more importantly, what their world will look like after your solution is implemented. This is the written equivalent of the car salesperson allowing the customer to take a car out for a test drive. You want the prospect to begin to form a vision of how much better things will be with your solution in place. The rest of the proposal will be spent shoring up that vision.

Once that's done, the balance of the proposal will vary, depending on what you are offering, to whom you are offering it, and so on. However, one thing you absolutely must do, no matter what the situation, is be absolutely clear about the pricing. Near the end, create one section called "Timetable and Pricing" or something like that, and lay it all out, clearly, concisely, using numbers with dollar signs in front of them. Few things drive readers more nuts than a proposal which is cagey about what the project will actually cost. You may be understandably nervous about quoting a price, but grit your teeth and do it anyway.

Also, in the body of the proposal, take it easy on the boilerplate. A lot of firms have copy that they just plug into every proposal they write. A certain amount of this is unavoidable, but use as little as you can. Reading canned copy is extraordinarily tedious. It's obvious to the reader that it's canned because it's vague and general, and often has a completely different tone or style than the rest of the proposal. When the reader figures out that you haven't bothered to write much real copy, they quickly reach the conclusion that you're going to use the same cookie cutter approach to your work.

Finally, remember the rule that you should "Tell them what you're going to tell them, tell them, then tell them what you've told them." This means that the proposal has to begin with a one-page Executive Summary. Despite its dumb, bureaucratic name, the Executive Summary is extraordinarily important because it's often the only thing a lot of people will read or remember. Sorry, but that's the truth. So make it good.

Similarly, end the proposal with a Conclusion that restates your key points (remember to keep it focused on the client). Again, your readers will remember a shockingly small percentage of what you actually write. Repetition is the secret to insuring that your essential points are baked into their brains. Resist the temptation to end with a bunch of high-flown, vague blather ("This new accounting software will catapult Prospect into the 21st century." Yeah, right.) Keep it organized, concrete and stick to the essentials.

A proposal is a lot like a screen test, or perhaps the pilot episode of a television show. What you say is not unimportant, but how you say it is at least as important, because it's what can really set you apart. One of my favorite mystery writers, Robert B. Parker, put it really well on *Potshot*, one of his terrific Spenser detective novels. I'll end this month's newsletter by quoting Spenser's sidekick Hawk.

"The rest of us, we see something that needs to be done, we do it. We don't care much how we do it. Spenser thinks that how you do it is as important as what you do." . . . "Why?" Bernard said. Hawk grinned suddenly. "So he be different than us."

I suspect Hawk would be really good at writing proposals.

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