

**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.

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## 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.

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

Compliance includes:

- Structuring your proposal as 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'.
- 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 that 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 bid 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

- **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.

- **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. Customer 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% compliance, it's reasonable to revisit your bid/no-bid decision.

- **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&A proposal).
- **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 to be 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 direct 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, e.g., "We use ultra-bright yellow dye to color the boxes, increasing their visibility in dark warehouses."
- Include a quote from a current customer, e.g., "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, e.g., "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.

- **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 state 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

- **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:

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

Understand your market (government versus commercial), and remember key differences, such as:

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

## Tools and templates

- [Compliance-Matrix.xlsx](#)
- [Response-Matrix.xlsx](#)

## Features, Benefits, and Discriminators

### Introduction

Having a deep understanding of your customer's needs, your competitors' offerings, and your own capabilities (features) and unique characteristics (discriminators) allows you to communicate compelling benefits to buyers.

Here is a simplified way to think of features, benefits, and discriminators:

- Features = What?
- Benefits = So What?
- Discriminators = Why Us? Why does it matter to you?

### Best practices

- **Understand your customer's needs**

When you identify an opportunity, you assume that your capabilities potentially fit the customer's needs. But do they really? What unique value does your organization provide?

The sales/opportunity process helps you answer these questions. This process helps you build a relationship with your customer so you can understand the benefits they value and expect to purchase.

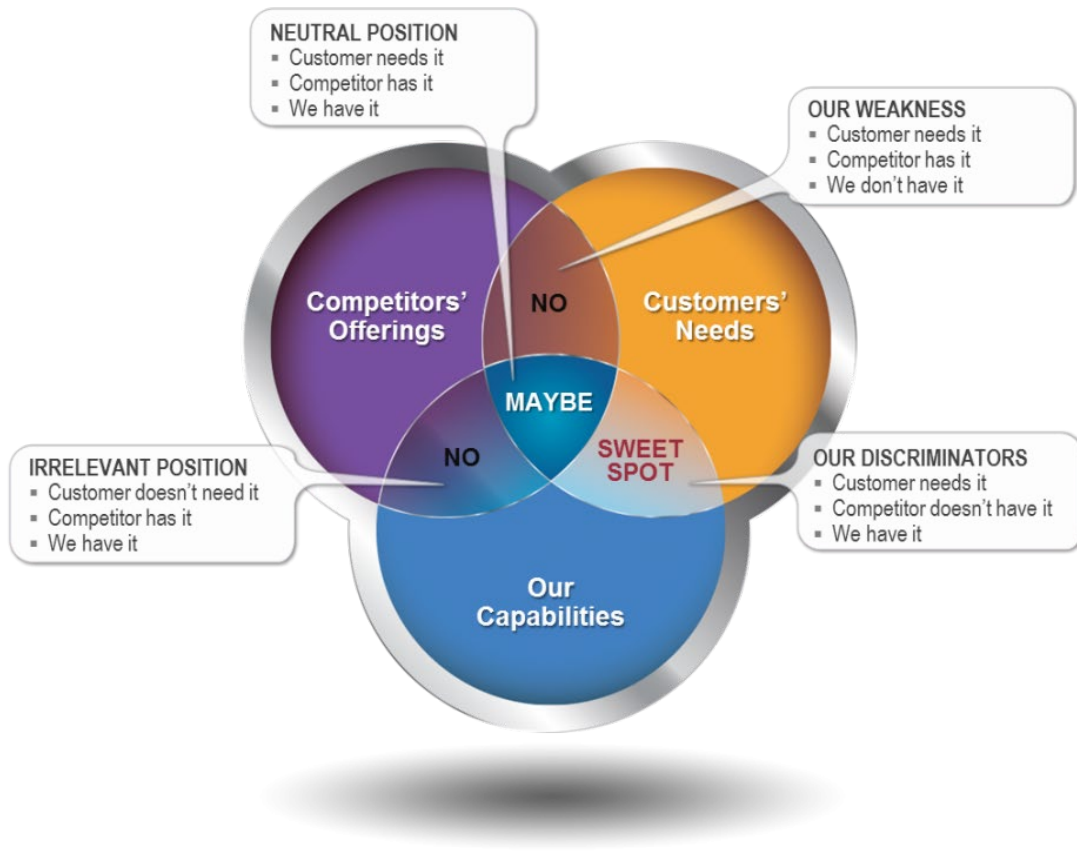
- **Determine your discriminators**

Maintain a clear focus on the customer's perceptions when determining your discriminators. Bidders/sellers often look too favorably on their own organization when assessing why their offer is unique.

For example, relying on your brand as a discriminator is a common mistake. While it is true that no one else can offer a solution with your logo on it, that is not automatically a benefit. Having large numbers of staff, locations, defined processes, products, experience, etc. are other features that need testing to see if they are benefits and potential discriminators.

For example, your brand's past performance and proof points are generally used to support your claims, but what benefit does this bring? Perhaps the learnings drawn from that experience can help deliver your customer's requirements faster, better, with less risk, or at less cost.

Figure 1 depicts the intersection of customer needs, competitor capabilities, and your own capabilities. Consider your features and your customer’s features in the same way to find discriminators. Discriminators can be found in the segment where you offer something that matters to the customer – and no one else does. No other set of conditions fully determines a discriminator. However, you can convert a feature that both you and a competitor have to a discriminator by offering a unique benefit around it.



**Figure 1. Discriminator Sweet Spot.** Look for your discriminators at the intersection of customer needs and your exclusive capabilities.

- **Quantify your value**

Quantified benefits are more compelling than those without a measure. For example, compare these two value propositions:

- “This car comfortably seats a family.”
- “This car comfortably seats five adults.”

It is possible that these two descriptions are for the same vehicle. The first statement raises more questions than answers: How big is a ‘family’? Are these children or adults? On the other hand, the second statement provides a measurable value proposition. And, in turn, unambiguous value to the potential buyer.

Relating to proposals, organizations often use theme statements such as ‘safe pair of hands’. This is trying to say that the bidder will be low risk or, more positively, will maximize the chances of success. But it’s unquantifiable. It would need to be developed further to identify specific benefits to the customer and attach a benefit to it.

Quantified benefits are more specific and compelling but proceed with caution. You must also be able to prove the quantification. For example, if the seller cannot show a photograph of five adults in the car, the buyer won’t believe it – and they might not believe the seller’s other claims.

Quantified benefits can also be useful in establishing performance metrics for contract execution. When the contract resulting from your proposal will be performance-based, make every attempt to quantify benefits throughout, backing them up with evidence.

For example, if the assurance that the ‘safe pair of hands’ bidder is looking for is founded on delivering the customer’s timeline on schedule, they could develop the statement to:

“You can trust us to deliver on time, as we have delivered 23 similar projects in the last two years. We’ve continually refined our process and created checklists that have helped accelerate delivery timelines by an average of 12%.”

This now contains a specific benefit, includes evidence, and contains a quantifiable benefit.

It is not always possible to quantify benefits. Tying benefits to the buyer’s mission or goals will strengthen their value in those cases. Using the buyer’s own language in describing benefits builds customer focus in your offer and reinforces the perception that you understand their needs

- **Sell the value of your offer**

See - [Value Propositions - APMP BOK](#) (sub-section: sell the value based on client benefits).

- **Apply the "So what?" test**

To make sure your benefits are not just reworded feature statements, ask “so what?” after you read each benefit. A feature statement will not answer the question, but a benefit statement will provide a clear answer. Benefits result from features and are responses to customer problems.

The “so what?” test requires writers to detach themselves from a solution and look at a proposal from the customer’s perspective. Offerors/sellers, particularly incumbent contractors, can fall into the trap of thinking they know what the customer really wants, which may be different from what the customer actually requested. Remember this when applying the “so what?” test.

- **Use feature/benefit tables**



Once you have found your features, benefits, and discriminators, begin building feature/benefit tables.

The name ‘feature/benefit table’ implies that the features come first and the benefits come second. However, to best demonstrate your understanding of a customer’s needs, place benefits in the first column and features in the second, as shown in Table 1. In the first column, link the customer’s needs to the benefits your offer provides. In the second column, link those benefits to specific features.

This approach puts the customer first because it shows what the customer wants to buy before showing what the offeror/seller is proposing. This is a key principle to use when writing content for your proposal.

**Table 1. A Typical Feature/Benefit Table.** List the benefits of your offer in the first column and their corresponding features in the second.

BENEFITS THAT MATTER TO YOU	FEATURES OF OUR OFFER
Accelerated schedule delivered to your end users 30 days sooner than required	93% reusable components from an existing, operating installation
Reduced lifecycle cost of \$50,000 per year through shared support services	Helpdesk, training, and refreshment leverage existing infrastructure and staff

**Terms to know**

- Advantage
- Benefit
- Bidder Comparison Matrix
- Differentiator  
Unique Selling Point
- Discriminator
- Feature
- SWOT
- Value Proposition

**Unseating the Incumbent**

**Introduction**

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.

Re-bid 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**

- **Collect and compile intelligence on the customer and incumbent**

When an old contract is recompleted, 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?

- **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 write about the actions necessary to mitigate these gaps.

<b>Contract requirements and customer issues/hot buttons</b>	<b>Incumbent performance score (1-5)</b>	<b>Incumbent deficiencies</b>	<b>Our improved solution</b>	<b>Gaps in solution</b>	<b>Actions required to mitigate gaps</b>
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**Figure 2. 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.

- **Capitalize on the incumbent’s weaknesses and neutralize its strengths**

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. Don’t forget to include evidence of your prior successes.

**Terms to know**

- Bid Decisions
- Price To Win
- Pricing Strategy
- Opportunity/Capture Planning

**Tools and templates**

- [Incumbent-Assessment-Worksheet.docx](#)

**Proposal Theme Statements**

A theme statement tells readers why they should select you. It links the most important customer needs to the discriminating features and quantified benefits of your offer. Win themes and major themes should be applied to the entire proposal and should be reinforced throughout the document. They are not sales slogans or catchy phrases used by marketing. Instead, they are specific statements that tie a unique discriminator to a critical customer need.

Unlike strategies, which describe the things you will do, a theme statement dictates things you will say. The following is an example theme statement: *Eliminate development risk and cost by selecting the only transport aircraft in this class that is currently in production.*

Theme statements should be reinforced and placed in sections, paragraphs, and headings. They are often highlighted or incorporated into callout boxes because they describe the key points you want the assessor to remember.

**Best practices**

- **Develop powerful, compelling theme statements**

Proposal themes should flow from the opportunity/capture strategy and address win themes, customer hot buttons, and your features, benefits, and discriminators. Using either a draft solicitation or a previous similar solicitation from the customer, create a top-level outline of your proposal.

Develop feature/benefit pairs that reflect the executed opportunity/capture strategy and align them with the outline. Start with the highest level of the outline (company qualifications, technical approach, past performance, etc.) and create a statement that achieves the following:

- Identifies a benefit to the customer linked to a feature you offer
- Ties that benefit to a customer issue
- Quantifies benefits whenever possible
- Highlights your previous success with that feature, benefit, or customer issue

- **Quantify the benefits of your offer**

Theme statements that include quantified benefits tend to be more credible and compelling. Consider the difference between these two statements:

Reduce order entry costs by installing e-entry software.

*Theme statement. The benefit is not quantified.*

Versus

Reduce order-handling costs by 30% by installing e-entry software.

*Theme statement. The benefit is quantified.*

Quantified benefits must be supportable, and you should provide evidence soon after in the proposal. If you cannot support your claims, change your theme statement.

Whenever possible, quantify benefits collaboratively with the customer. Customers who help determine the benefits of your solution will have more confidence in the calculation.

State the benefits in realistic terms rather than as broad generalizations or ultra-specific results. For example, the 30% savings mentioned in the previous theme statement could be interpreted as “around 30%,” with a deviation of plus or minus 5% to 10%. A more specific figure like 33% seems more credible.

- **Draft concise theme statements, preferably in a single complete sentence**

High-impact theme statements are like sound bites. If evaluators had to sum up their decision, what would they say?

The longer the theme statement, the more likely the evaluator will not read it. Writing concise discriminating theme statements is difficult work. To start, remove any words in your theme statement that you can without changing the meaning. If you can use a shorter (but still accurate) word, do it. If you can eliminate jargon, do it.

- **Read your theme statements out loud**

After you’ve written a theme statement, read it out loud, keeping in mind the following tips:

- **Did you need to take a breath to finish it?** If so, it’s too long. Try cutting unnecessary words.
- **Did it make sense, or did you stop yourself and start over?** Try again with fewer or simpler words. If the benefit-before-feature format confuses you, write what you need to say and then ask someone to help.
- **Does it sound like something a normal person would say?** Use simple, jargon-free language and short, declarative sentences.
- **Does it sound believable?** If you resorted to statements such as 'unique ability', 'greatest depth and breadth', 'world-class experts', and so on, you’ll need to prove those claims in your theme statement. If the quantifying numbers are 'too round', you may also need to show your work. For example, 27% is more believable than 30%.

- **Test the impact of your theme statements and improve them accordingly**

The litmus test for a good theme statement is twofold:

1. Could a competitor believably make the same claim?
2. Could an evaluator cut and paste the theme statement into an evaluation form to justify giving you the highest rating?

If you can answer ‘no’ and ‘yes’ to these two questions, respectively, you have likely chosen strong proposal theme statements.

If a competitor could easily make the same claim, see what details you can add to set your solution apart. While the second question is more subjective, you should make every attempt to ensure that your theme will resonate with evaluators.

- **Build a proposal theme outline against the structure of the response, then flow themes into content plans**

When you have completed the top levels of your response outline, flow related themes into the intended sections of the outline to ensure a consistent message and linkage of benefits throughout each major section of your response.

When the theme structure has been aligned, insert a suggested theme statement into each section of the content plan to help you write and organize your ideas around the larger strategies.

- **Use theme statements consistently**

As evaluators read your proposal, they will come to expect theme statements at whatever level you have decided to use them. If they are good theme statements, an efficient evaluator will even look for them before reading the rest of a section.

- **Maintain customer focus**

Companies are focused on their discriminators, and rightly so. However, evaluators are more concerned about how those discriminators and other features will satisfy their own organization's needs. Customer-focused writing is key in developing proposal themes. Placing benefits before features, tying them to customer issues, and naming the customer first (and more often than you name yourself) will sustain the attention of evaluators and communicate a reduced sense of risk.

- **Tailor your theme statement development and placement approach to the evaluation process**

Proposal professionals advocate distinctly different standards for theme statements, usually because a particular approach has worked well in a specific market. All of the following approaches are used:

1. Place a single theme statement at the beginning of sections, typically at a uniform indenture level.
2. Place a theme statement anywhere you discuss a significant discriminator.
3. Place a series of theme statements at the beginning of major sections in a single box.
4. Place a single theme statement at the top of every page.

The first two approaches are more effective in less-disciplined, more casual approaches to evaluation, which are common in many nongovernment market sectors. Short, concise theme statements are more likely to be read and remembered when the winner is being selected in a group discussion.

The first three approaches capture the attention of skim readers. Skim readers are usually senior managers who play a major role in the selection decision but are not assigned a formal evaluation role.

Option 2, placing theme statements anywhere you discuss a significant discriminator, suggests that the bidder has numerous discriminators. If a theme statement directly answers a specific question or requirement, then the highly visible theme statement makes evaluation easy.

The risk in requiring theme statements at set points in a proposal is that writers might lack a discriminating feature. It forces writers to draft more theme statements, which may not be as focused or persuasive. Evaluators who have to read numerous theme statements are less likely to remember your major discriminators.

Option 3, placing a single theme statement at the beginning of the section, requires the writer to identify the single most important discriminator in the section and incorporate it into the theme statement. The concept is correct, but the implementation is more difficult.

This approach has advantages in complex and formally solicited proposals with a detailed, disciplined evaluation process. Summarizing your response to the compliance requirements, for example, in a single place makes evaluation easy, potentially increasing your score. However, individual evaluators at the item level have minimal influence over the final selection. Evaluators with decision-making power tend to skim proposals and are less likely to remember anything said in a collection of themes. They are more likely to remember a single, concise statement.

Finally, placing themes at the top of every page (option 4) is the least-effective choice. Evaluators tend to perceive themes at the top of the page as headers and ignore them. Writers forced to draft a theme for every page tend to draft ineffective, general, and less-persuasive theme statements.

Each approach has potential advantages and disadvantages, depending on how the proposal will be evaluated. Remember: focused, persuasive content is much more important than the number of theme statements or the placement of those theme statements in your proposal.

## Common pitfalls and misconceptions

- **Writing proposal sections before themes are identified and reviewed**

This can lead to a lack of alignment between themes and proposal content.

- **Failing to provide adequate proof**

Evaluators will not believe your proposal themes unless you use sufficient, quantifiable, and verifiable proof (differentiators and substantiating metrics) to persuade them.

## Terms to know

- Best and Final Offer (BAFO)
- Content Plan
- Customer-Focused Writing
- Discriminator
- Elevator Speech
- Opportunity/Capture Strategy
- Theme Statement
- Win Strategy

## Proof Points

### Introduction

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 identify weaknesses in your solution, question whether features are proven and benefits achievable, and perceive risks to successful performance. Proof points make your proposal compelling and credible and give the customer confidence that you can provide the feature and corresponding benefit(s) you promise.

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.

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

### Best practices

- **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 (e.g., testimonials) so they are not all the same type. 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.

- **Conduct data calls before and after RFP drop, both internally and from teaming partners.**

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/Proposal Manager should determine the following:

- What data best substantiates 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?

- **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%, compared to 82% industrywide for similar IT positions. On Help Desk projects such as this one, our retention rate is 98% 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 three 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 three 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.*

- **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.

- **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](#)

## Value Propositions

### Introduction

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

- **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 10-15% 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 3-5% 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.

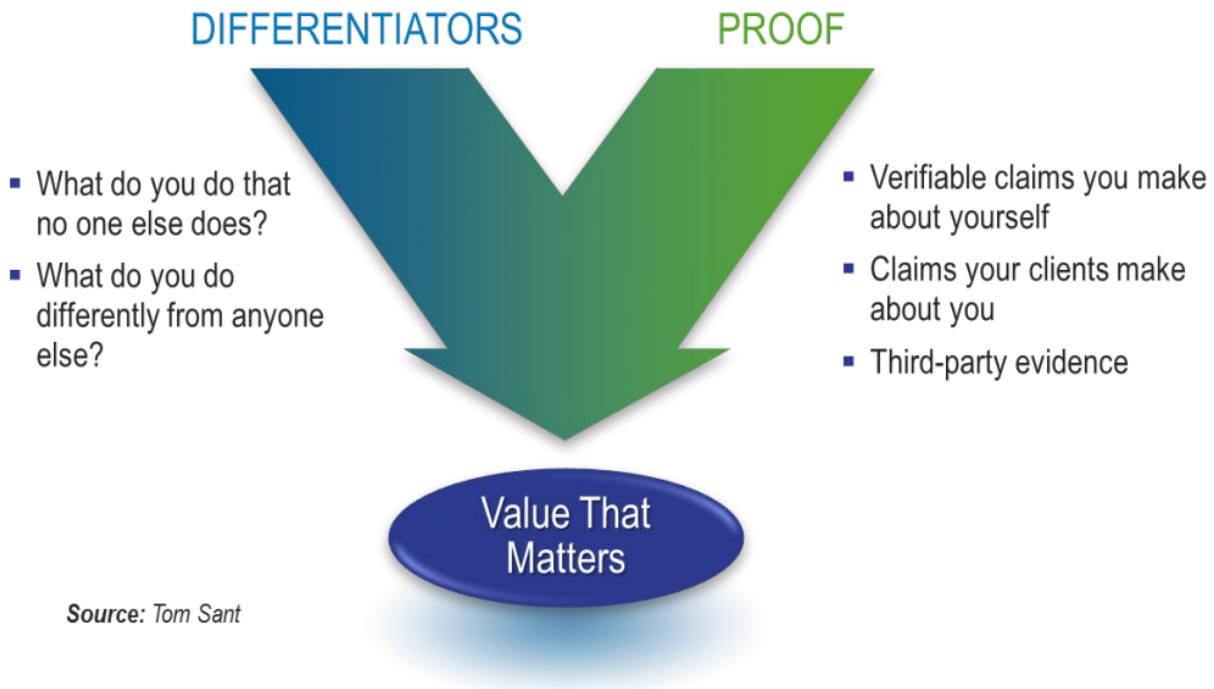
For example: "By using the proposed products, customers of ours operating in your market sector have reported an 18% to 23% increase in NPS."

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.

- **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 customer. 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 3 illustrates how discriminators and proof points combine to demonstrate value to a customer.



**Figure 3. Building a Value Proposition.** *Combine your unique claims with proof, and link these to client benefits to add real value.*

- **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/Proposal Manager is to maximize the difference between the value the client gets and the price they pay for the work.

Use Competitive Price to Win methods to arrive at a winning price. Historical databases, teaming partner knowledge, and Competitive Price to Win Consultants can help you do this.

[See Competitive Price To Win](#)

- **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% of the time they currently spend doing the same task manually."

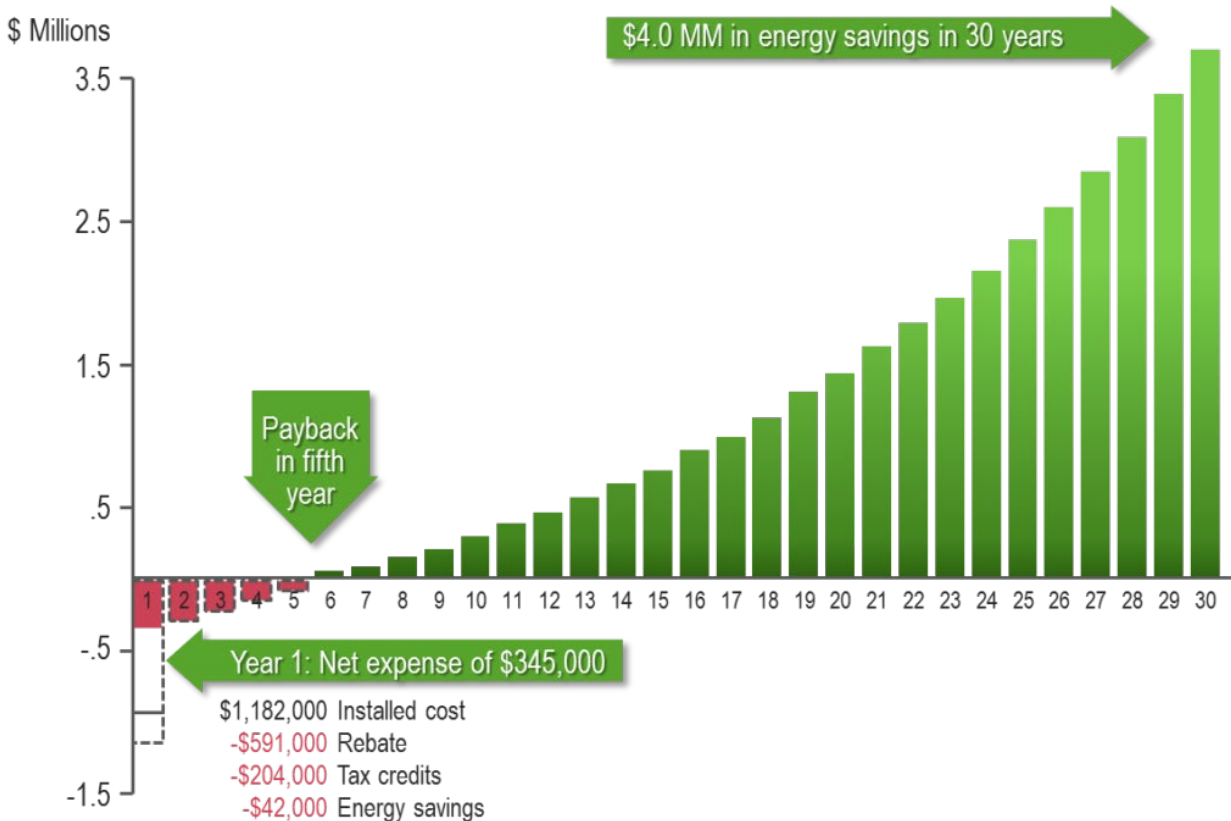
- **Rate.** This is usually a percentage and is sometimes called the internal rate of return (IRR). For example: “If you spend \$100 and expect a 30% return, then you expect \$130 back.”
- **Value.** This is usually measured as an amount of money. It is sometimes called net present value (NPV) or economic 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..

- **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](#) 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 4 illustrates this scenario.



*Assumptions: 147 KW (AC) PV system, electricity inflation rate = 7% (v. historical inflation rate of 7.65%. Source: CA PUC 1970 – 2000), 6% discount rate, 34% marginal federal tax rate.*

**Figure 4. Showing Benefits with Visuals.** *Illustrate the value you offer using graphics wherever possible.*

- **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 **T**ime-sensitive.

**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 recompet. The measures used for the recompet 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 recompet 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/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](#)

## Content Plans

### Introduction

Winning proposal content is planned before it is created. How you plan 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

- **Implement a systematic approach to designing content**

First and foremost, follow a clear, requirements-driven process for designing your proposal content (see Figure 5). 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 5. 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.

- **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/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 if 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.

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.

- **Informal proposals**

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, you can use compliance and response matrices for both formal and informal responses. 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.

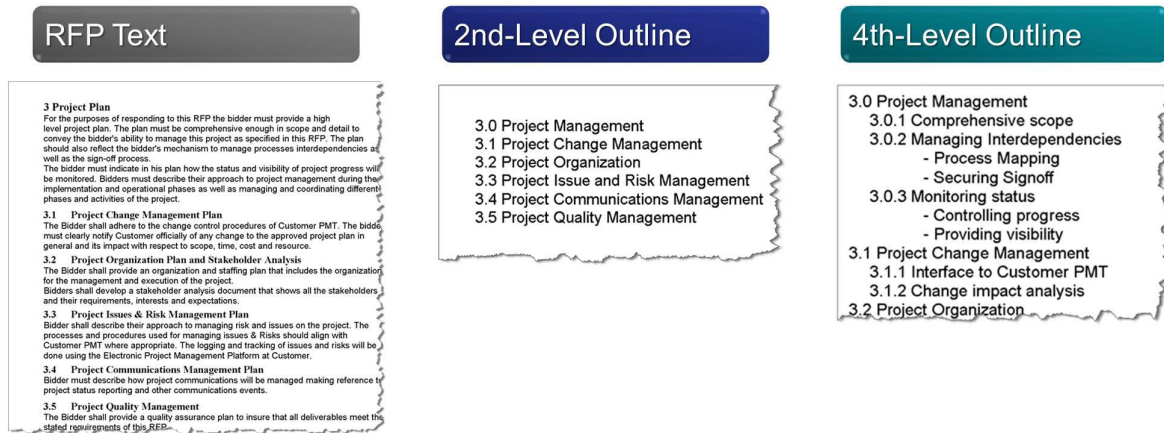
- **Create a robust topical outline**

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.

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 6.



**Figure 6. 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.

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. Add detail where the evaluation weightings are highest.

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. 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.

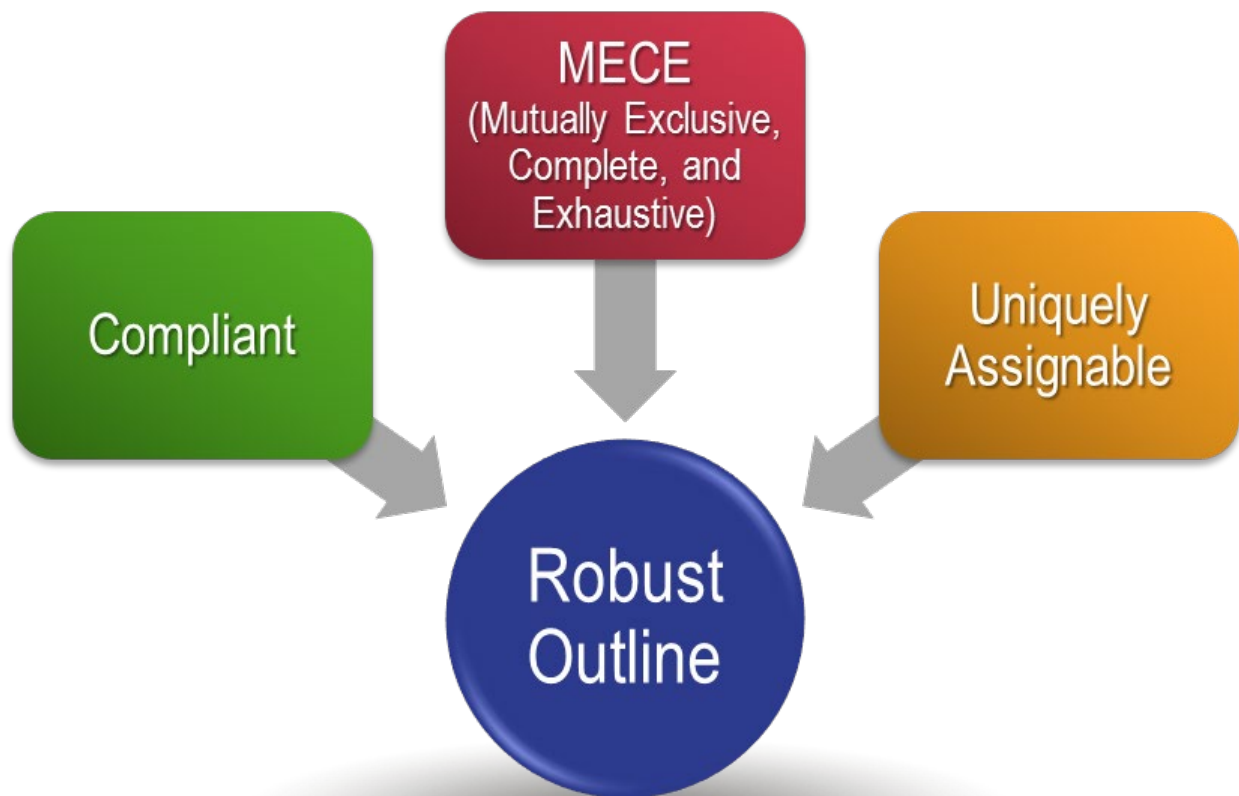
*Is it MECE?*

- 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 7, are met. An outline that must be changed or responsibilities that have to be reassigned as a result of further analysis or discovery during the development process are not robust. Lack of robustness will lead to confusion, duplication of effort, rework, and potential non-compliance.



**Figure 7. A Robust Outline.** *The proposal outline can be robust only if it is compliant, MECE, and uniquely assignable.*

- **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 where each step builds on what went before. This means that you need to know the requirements in detail early in the process.

To create section content plans, use a template like the one in Figure 8. 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**



<b>Proposal</b>	Gulf Area Process Transformation	<b>Volume</b>	Management Volume
<b>Section</b>	3.0 Project Management	<b>Author</b>	A Murray

**BRIEF 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

**Requirements/ RFP 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 8. 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.*

- **Involve your writing team in content plan creation**

If you are using section content plans, the Bid/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/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/Proposal Manager and the writer that defines what is to be developed.

- **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?

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.

- **Create content with evaluators in mind**

When it's time to create the content, remember that proposal evaluators may be “skimming” your proposal rather than 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.

- **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.

## **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 91 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 form 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 as 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 up 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/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/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.

## Tools and templates

- [Content-Plan-Template.docx](#)

## Proposal Organization

### Introduction

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

- **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.

- **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.

- **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.

- **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.

### Terms to know

- Content Plan
- Informative Heading
- Telegraphic Heading
- Value Proposition
- Win Themes

## 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 can work in certain environments.

- **Maintaining the library**

Some content may be truly 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 9:** *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.

## 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.

## Terms to know

- Proposal library
- Proposal writing style guide

## Executive Summaries

### Introduction

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. This improves your chances of winning.

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.

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.

## Best practices

- **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.

- **Strategically assign writing and review responsibilities**

Who should write the executive summary? It’s 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/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.

- **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, made it easy for them to navigate since it bears their own wording, and included a benefit to add some appeal.

- **Draft and review early**

The executive summary is the most scrutinized 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.

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.

- **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.** 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.

- **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.**

**Section 2: Introduce your solution (including key benefits).**

**Section 3: The customer’s investment (costs, price, conditions)**

**Section 4: Show your customer the next steps.**

**Section 5: Wrap things up.**

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

Other practices to follow:

- Apply principles of clear writing
- Visualize with graphics, charts and images
- Review and test the summary before submitting it

## Common pitfalls and misconceptions

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

- Don’t confuse the executive summary with the cover letter. These are two separate elements of a bid. Be sure that your executive summary does 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 customer as you can.
- 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)
- Hot Buttons
- SWOT
- Win Themes

**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**

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

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 that 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-% 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

- **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.*

- **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.

- **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.

- **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
- **Cut Down** Check-In Time by 40%
- **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
- **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 a period or a colon and a space.

- **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

- **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, 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% 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.”

### Terms to know

- Benefit
- Discriminator
- Feature
- Hot Buttons
- Informative Heading
- Telegraphic Heading
- Value Proposition

## Tools and templates

- [Checklist-for-Writing-Effective-Headings.docx](#)

## 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.

## Impactful Proposal Graphic Design

When used effectively, graphics increase your proposal's clarity and persuasive power, as well as your win rate. Writers should spot opportunities to use graphics with the text they are generating.

### Proposal graphics increase win rates

Clear, compelling, audience-focused graphics (including covers) improve win rates. They convey information to the audience in a more compelling and easily digestible manner, and they help reach readers both intellectually and emotionally. They can also communicate faster and improve reader recall.

A 3M-sponsored study at the University of Minnesota School of Management found that presentations that use visual aids are 43 % more persuasive than those that do not.

Visuals also improve reader recall and foster an accurate understanding of the material you’re presenting. Figure 10 shows an example of this. Which approach makes it easier to understand what a circle is?

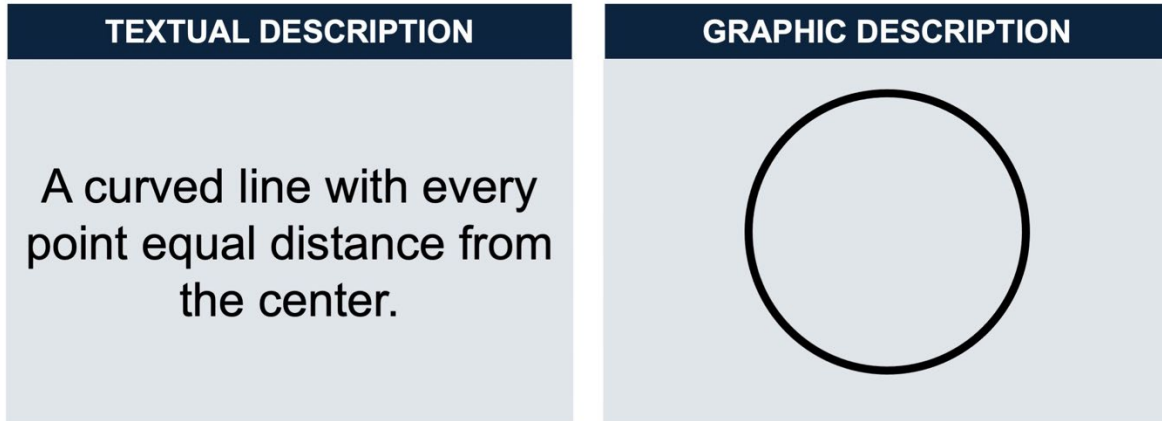


Figure 10. Graphics vs. Text. *Graphics are often more understandable and improve recollection.*

Effective graphics demonstrate professionalism and proficiency faster than words alone, grab attention, and influence a reader’s decisions. Consider the example in Figure 11, which shows the same story told both textually and visually. Do you notice any differences in how the two presentations engage you? Help you comprehend the story? Make you feel?

Graphics, when done correctly, make it easier to review your proposal. They highlight the most important and impactful parts of your solution. Visuals can quickly differentiate your offering, communicate the quality of your response and solution, and set the tone for your proposal.

Infographics like the one in Figure 11 can influence the mechanisms of rational thinking. They can also create important emotional responses, such as a sense of trust.

**DDS’s Custom Tiered Help Desk Support Model**

New Tech is committed to trouble shooting and solving user IT issues through our Help Desk that is customized to DDS’s needs. Historically, our Help Desk can resolve 99.9% of trouble tickets within 6.2 hours of the ticket’s creation. Our innovative Help Desk support model is made up of 3 escalating tiers; Tier 1 – Automated Support, Tier 2 – Virtual Support, and Tier 3 – In-Person Support.

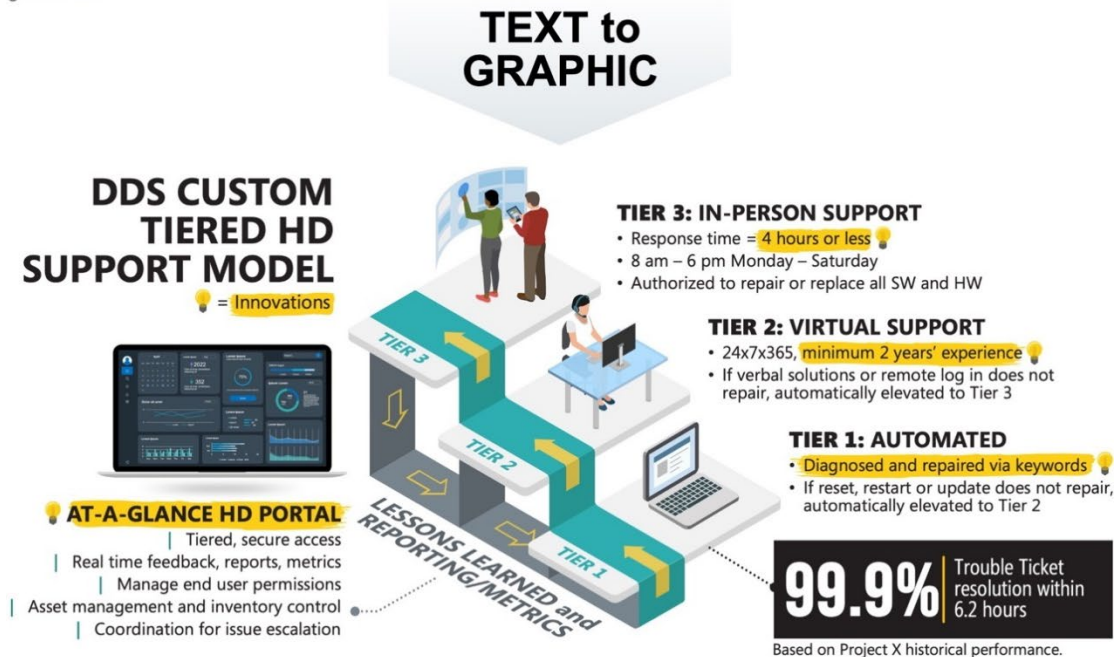
Tier 1 is the ultimate user-friendly DIY troubleshooter. Through our easy-to-use Help Desk portal, users can select our innovative IT Support platform to diagnose, reset, repair, and restart their systems simply by using a few key words. Anything a user may need to troubleshoot the most common issues themselves can be found under IT Support. If the user goes through the suggested steps and does not immediately fix their issue, the ticket is automatically escalated to Tier 2.

Tier 2 is made up of our virtual IT technicians ready to support users 24 hours a day 7 days a week for technical issues that are a bit more complex than Tier 1 can handle. With a minimum of 2 years of experience, our technicians are trained and ready to verbally walk the user through fixing the issue or if more hands-on help is needed, our technicians can remotely log in to the user’s system to fix the issue. Our virtual technicians stay online with the user until they are sure the issue is fixed. If the ticket is not resolved within 2 hours of working with the virtual technician or it is apparent sooner that an in-person visit is needed, the technician will escalate the ticket to Tier 3.

Tier 3 is made up of our most experienced certified IT technicians ready to support in person for the most complex issues. Our typical in person response time is 4 hours or less and available every Monday—Saturday 8 am-6 pm. With equipment prepared in advance, our in-person technicians are authorized to repair or replace all software and hardware as needed on site at the time of visit.

Our Help Desk Portal is the ultimate Help Desk tool for users and technicians. Not only is Tier 1 accessed through the portal, but technicians can also securely access and manage end user permission, check inventory, procure assets and coordinate Tier 2 and 3 escalation. Real-time feedback, reports, and metrics for New Tech program managers and DDS ensuring quality and continuous improvement of the Help Desk. All access to the portal is secure and customizable based on defined access levels and need.

In short, our innovative IT Help Desk is ready to support the user with our customized easy-to-use portal, DIY Tier 1 – automated support, Tier 2 – virtual support technicians ready to solve the more complex issues anytime day or night, and for the most complex issues, our Tier 3 – In-Person support technicians are ready to solve any IT issue in on site. User issue resolution is guaranteed.



**Figure 11. Text to Graphic.** This image shows a text-only description compared with a graphic depiction that includes edited text from the narrative.

Researcher J.R. Levin points out: “Pictures interact with text to produce levels of comprehension and memory that can exceed what is produced by text alone.”



## When and how to create graphics and objectively evaluate them

Proposal graphics are vital in three situations:

1. **When your topic is complex:** Graphics like diagrams, charts, and visuals communicate intricacies more clearly than text alone. Network diagrams, quantitative charts, dashboard graphics, Gantt charts, organizational charts, and process diagrams can all help you convey your message clearly, and often in less page space.
2. **When your information is critical to success:** If key points are misunderstood or overlooked, your proposal may seem deficient. Clear, compelling graphics increase favorable reviews.
3. **When you want to influence emotions:** High-quality graphics positively impact the perceived quality of your solution. They build needed trust.

Create your messaging and concepts early, before you write the proposal. While this may seem counterintuitive, doing so provides a shared vision and messaging up front. It can also reveal gaps that need to be addressed early. You can also use conceptualized/draft graphics and their titles/action captions as a storyboarding tool, helping you write and define your proposal content.

Once you've chosen which messages can become graphics, follow these four steps:

1. **Summarize:** Summarize your graphic in one sentence. This becomes the title (for an oral proposal) or action caption (for a written proposal) and can help you define what you want to say before you draft the graphic. Keep this message as succinct as possible to improve understanding and recall. The conceptualizer, author, or SME does this.
2. **Explain:** Provide details that support your one-sentence summary.
3. **Visualize:** Turn the summary and explanation into a visual concept.
4. **Render:** Turn the concept into a professional, compliant graphic.

## 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

- **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.**

- **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 our own 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.*

- **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 who have 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.

- **Tailor any re-used or boilerplate content**

You should make sure that content is tailored, not boilerplate: top & tail, get specific (references to the project name, people names, site names, etc.), and mirror their language. If your re-used content says program management and they are asking for project management, regardless of whether or not they are entirely accurate in their 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.

*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 yourself: “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.

*Review and edit with customer focus in mind*

Step back after writing your content and perform a self-review. Put yourself in the shoes of the reader and ask yourself: have we answered the question? Have we made it all about them? 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 or like an academic 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. 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.

## Terms to know

- Persuasive Writing
- Writing Clearly
- Tone
- Narrative

## Writing Clearly

### Introduction

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.

For information about the form of proposals, see APMP BOK sections on [Proposal Organization](#), [Proactive Proposals](#), and [Executive Summaries](#).

### Best practices

- **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% cost improvement within the first six months and a further 8% within the first year. At the same time, errors in scheduling were reduced by 16%. Typhoon estimates the total cost savings to be more than 25% over 12 months, which equates to a return on investment of more than 80%.

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:"

### Types of stories

There are three types of stories you can tell your customer:

- **The Big Story:** Why you and 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.

- **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.

- **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.

- **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 nine 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.** 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 the first sentence. 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 has 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 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

- **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:

1. **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?
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**2. Apply numbered and bulleted lists appropriately**

Numbered and bulleted lists are easy ways to open your documents up 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).

**3. 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.

**4. 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).

#### 5. 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'/'your') 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. 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 times' 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.

## 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 many proposals, in part or in their entirety. Any reader with expertise outside of 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.

## Terms to know

- Active/Passive Voice
- Nominalization
- Noun Stack
- Style Sheet
- Transitions

## 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](#)

## Persuasion and Persuasive Writing

### Introduction

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

- **Understand how central and peripheral processing affect decision making**

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.

- **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.

Applying Cialdini to proposal writing: 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
<b>Reciprocity</b>	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.
<b>Scarcity</b>	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.
<b>Authority</b>	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.
<b>Consistency</b>	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.
<b>Liking</b>	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.
<b>Social Proof</b>	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.

- **Know your audience so you can use the right techniques to match their perspectives**

A proposal is a written argument, not the 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 their 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.

- **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
<p style="text-align: center;"><b>Introduction</b></p>	<p style="text-align: center;"><b>Executive Summary</b></p>
<p>Informs audience of purpose, creates interest, explains approach, establishes credibility</p>	<p>Declares purpose, creates interest, forecasts approach, establishes credibility, summarizes offer</p>
<p style="text-align: center;"><b>Statement of Fact</b></p>	<p style="text-align: center;"><b>Current Environment</b></p>
<p>Sets background of the situation, describes context, explains current conditions</p>	<p>Identifies problem, demonstrates understanding of context, establishes needs/wants</p>

<b>Confirmation</b>	<b>Recommendation</b>
States position, presents proofs, expresses value	States solution, validates solutions with proofs, describes benefits
<b>Refutation</b>	<b>Cost Proposal</b>
Addresses gaps, responds to contrary positions	Defines costs, expresses value
<b>Conclusion</b>	<b>Implementation</b>
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/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.

Common rhetorical tools used by the modern Bid/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 by their ancient terminology, these three arguments should be present in any persuasive proposal.

- **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. 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.

- **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 and then 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%, or 1.8 hours per day."

- **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.

### Terms to know

- Principles of Influence
- Rhetorical principles

### Tools and templates

- [Persuasive-Writing-Checklist.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, actual know-how, and added 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

- **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 use them to evidence how your solution fits your customer's needs.

- **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.

- **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.

- **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.

- **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 to 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.

## **Terms to know**

- Subject Matter Expert
- Open-ended Question

## 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

- **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 it are represented in your proposal.

- **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.

## 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.

## Tools and templates

- [Resume-Template.docx](#)

## Review Management

### Introduction

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

- **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 writing process. 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
<b>Content Plan Review</b>	An assessment to validate the execution of the bid strategy for writers and to verify compliance with customer requirements.	Initial planning can take place before final RFP release and repeated after RFP release.	Assess proposal strategy (story, messaging, solution depictions, proof) to ensure competitiveness, compliance, thoroughness, accuracy, and alignment with customer requirements, needs, and hot buttons. Provide concrete direction to team for improvement.
<b>Final Document Review</b>	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% to 85% 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. It provides concrete direction to the team for improvement.

Outside these formal reviews, other reviews should be taking place:

- **Content development reviews:** performed time-permitting, then intermittent, reviews of drafts created by proposal writers and content contributors during the content development process.
- **Proofreading:** a final review of proposal content that’s outside the above review process and after the editing process. It ensures that the content is consistent and accurate in terms of grammar, spelling, punctuation, agreed proposal writing style, and formatting.

- **Establish a process for content development reviews**

High-quality proposal submissions require interim reviews of content during the writing phase. These are check-ins with the proposal writers or content contributors by the Proposal Manager and other members of the bid team.

The purpose is to obtain a temperature check on progress and undertake a short review of the content produced so far. The target should be to review as complete as possible sections. Questions asked should include:

- How complete is the section?
- Where are the gaps, and is there a plan to fill them?
- Is the content developed in line with the proposal strategy?
- Are the win themes coming through?
- Are set-ups (and other content that's possible to develop at the point of review) drafted?
- Are there any inaccuracies or incorrect assumptions?
- Is the content flowing in an appropriate order that's helping to tell our story?
- How could the current draft be improved?
- What's missing to ensure we achieve maximum evaluation scores when the content development process is complete?

The timing of these reviews depends on the bid timeline, so the following suggestions are indicative:

- Less than 2-week content development phase: schedule one content development review (target at least 60% complete at review)
- 2- to 4-week content development phase: schedule two content development reviews (target at least 60% complete and then at least 80 % complete at each review)
- More than 4-week content development phase: schedule at least three content development reviews (target at least 50% complete, then at least 70%, then at least 90% complete at each review)

- **Ensure you leave time and space for proofreading**

Everyone knows that you need to leave time to proofread the proposal. This occurs at the end of the process before you submit. At this point, someone independent of the bid team with strong writing skills reads through your document, looking to ensure consistency and accuracy in grammar, spelling, punctuation, and alignment to agreed-upon writing style and formatting. Eliminating small errors in these areas, as well as sometimes spotting serious mistakes (for example, using the wrong customer or project name), is a crucial part of the process to ensure your proposal is error-free.

What's the risk if you don't do this? Though many proofreading errors will be relatively minor, repeat offenses across a small number of pages will distract the evaluator and potentially signal that there's been a lack of due care and attention with your submission. And if you can't do that in your proposal, how can they trust you to deliver the service they want meticulously?

Common mistakes picked up at the proofreading phase include errors in:



- Style and tone (keeping it simple, personalized, and conversational, avoiding tautology, making it active, etc.).
- Punctuation and grammar (possessives, capitalization, full stops, end of bullet points, using numbers, etc.).
- Spelling (commonly misspelled words in your company/industry, language).
- Commonly confused words (advice versus advise, or principal versus principle).

We don't expect proofreaders to make in-depth changes or check facts. Proofreading is not the same as editing. A proofreader is not going to wave a magic wand and turn your proposal from mediocre to a winner. The focus is on checking the proposal for any kind of errors in a final step before you submit your proposal.

### 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](#)

### Orals

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 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.

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 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.

## 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. 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.

- **Harnessing the power of three: a key best practice for script writers**

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.

## Proactive Proposals

### Introduction

Proactive proposals are typically non-formal, non-procurement-led requests by a customer for a proposal. For smaller opportunities, they could be the artifact that your customer needs to help them make their buying decision. They could also be requested or provided as part of the business development phase of capture. In this context, they could be used to help position your ideas and solutions, to influence the customer's decision makers, or to act as a tool to get views and opinions from your customer. 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

- **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. Non-compliance shows a careless, arrogant tone.

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

### 1. 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 % and 10 % of the entire proposal.

### 2. Preview the organization of your proactive proposal.

Decide on the outline of the rest of your proposal before starting to create content. Make sure that the sections within the proposal allow you to:

- Demonstrate understanding of your customer’s current issues and challenges, and what they want to achieve. If you are not clear on their current position and objectives, then use your knowledge of other customers to describe what you are seeing and then use the proposal to refine which topics are relevant to your customer.
- Show that you have a solution or a set of ideas that can help the customer achieve the outcomes that they desire or the outcomes that you know others are trying to achieve.
- Provide evidence and proof points that back up your ideas with case studies, anecdotes, and testimonials to give the reader assurance of your competence and experience. Whatever combination of proof points you use, to enhance levels of persuasion, also include statements on the value delivered to other customers.

If this is very early in the relationship with the customer, then consider if you need to provide an overview or introduction to your organization – particularly if this document will be used as a way of promoting you to your customer.

Give an indication of commercials, if relevant at the stage you are at with the customer, but with a focus on the value or ROI that your solution will provide or typically can provide.

Show a path to procuring the solution from you via a simple set of next steps.

Within your outline, consider the customer's hot buttons, issues, and motivators. Then organize your content in the order of importance of their hot buttons. Use the customer's words or phrasing when naming hot button issues. Introduce the organization of your proposal in a table of contents.

### **3. 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?

## **Q&A Proposals**

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

- **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.

- **Outline your proposal.**

### 1. 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.

### 2. 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 strategic unity across the proposal.

### 3. 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.

- **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?"

## 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 and 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.

## Terms to Know

### Content Development Review

These are reviews undertaken by the core team to check on writing progress at defined points in the process. Sometimes known as draft reviews, they fall between the content plan review and final document review stages, depending on timing. Though the focus is on progress, they are also used to check on compliance, responsiveness and how the answer will score against the evaluation criteria.

### Editing

Editing is the process of refining and improving the structure, flow, and language of written content in the proposal. It tests whether the content is clear, persuasive, customer focused and whether it contains the

correct proof points. Editing should be performed by the writer of the content, but also may be allocated to a professional editor who will 'one voice' the entire proposal as well as improve quality.

**Oral Proposals**

Usually occurring after submission of the proposal, though sometimes also as part of the process, this is where individuals or teams present their solution in person or virtually to their customer or prospect's stakeholders and decision-makers. The customer usually sets an agenda and is trying to get a preview of what it will be like to work with the bidder. Usually, a select number of bidders are invited to present (sometimes known as the 'shortlist'). Sometimes the presentation is scored as part of the evaluation. These meetings are often followed by a question-and-answer session.

**Presentation**

The same as 'oral presentations'. Also sometimes known as the 'pitch'.

**Proofreading**

Proofreading is the meticulous review of written content to identify and correct errors in grammar, punctuation, spelling, and style, ensuring the accuracy and clarity of the document before finalisation and submission.