

How to Write

**PROPOSALS,
SALES LETTERS
& REPORTS**

NEIL SAWERS

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Edmonton • Canada

The discovery process

Your objective

- Understand the client's present position
- Be clear on what the client wants to achieve
- Be aware of any factors that may impact the proposal

Take the time to do the up-front work...the fact finding, research, knowledge and intelligence you must bring to bear to achieve the objectives set out above.

II - THE DISCOVERY PROCESS

The discovery process is arguably the most important part of developing proposals. The end result of this process is that you:

- Fully understand the client's present position
- Are totally clear on what the client wants to achieve
- Are aware of any special factors that may impact the proposal

The discovery process is all about the importance of doing the up-front work. This work involves the fact finding, research, knowledge and intelligence that you bring to bear in order to achieve the above results. Integral parts of this up-front work are:

- The use of exploration tools
- The proposal package itself
- Any briefing you attend

First, however, I want to stress why this up-front work is so important.

Importance of the up-front work

Too many vendors fail to get the order because they don't spend enough time up front to do the information gathering, research work and analysis critical to fully understanding what must go into a proposal.

Let me show you what I mean by using two different approaches. We'll assume that you're bidding on catering a dinner for a quarterly staff meeting at a medium-sized company.

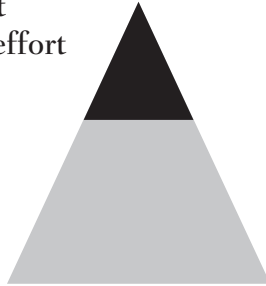
First approach

You sit down with the client, discuss the kind of meal they want, the number of people and the budget. Equipped with this information, you come up with your proposal. The client thanks you, and says they'll get back to you.

The up-front work leads to clear focus and direction

Regular triangle (1st approach)

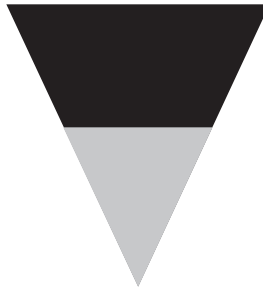
Up-front time & effort



Scattered focus = too little work up front

Inverted triangle (2nd approach)

Up-front time & effort



Focused result = successful work up front

To a large degree, discovery is all about asking questions.

Second approach

You sit down with the client and start to ask some questions. For what kind of occasion is this meal? Is there anything special the client wants to achieve? You discover that this is the firm's fifth year in business, and because they're doing well, this is more of a celebration.

By probing deeper you find out that two people will be specially honored. One is leaving to take up another position after making substantial contributions to the company. The other is being promoted to fill the vacancy. The company is also celebrating the introduction of a new product to the market.

In your proposal, you tailor the meal to the occasion—you know exactly what it is the client wants to achieve. The client accepts your proposal.

The triangle graphic on the opposite page illustrates both approaches.

The *regular triangle* represents the *first approach*.

See how little time was spent at the top to discover the real situation. Many vendors make this mistake. They want to get to the proposal so badly, especially their ideas to solve the problem, that they spend insufficient time up front to make sure they are aware of all the ramifications. As the triangle demonstrates, they are not focused on the result. This approach fails.

The *inverted triangle* represents the *second approach*.

Time is taken to find out, up front, what the client really wants. As a result the vendor is focused on the client's desired result. This approach succeeds.

Yes, it's a simple illustration, but here's the point. When you're clear on what the client needs, because you've done the up-front work to find out, you are properly focused on finding the solution.

Discovery is all about *asking questions* and setting the big problem front and center so it can be examined—and questioned again. One approach is to focus first on the negative—on what may not be working—then move on to the positive solution.

Use exploration tools

Your own thinking

Brainstorming

Mind mapping

Freewriting (Rapidwriting)

These tools help in:

- Research planning
- Briefing and proposal preparation

Importance of inclusion

The more you involve your team and other associates in using these tools, the greater the input and the better the results.

USE EXPLORATION TOOLS

These tools and concepts will help you do research invaluable in preparing for a briefing, as well as deciding how best to approach the proposal itself. You are probably familiar with these tools, but do you use them? They are:

- Your own thinking
- Brainstorming
- Mind maps
- Freewriting (or Rapidwriting)

These tools take advantage of the way our minds work. We don't think linearly. Rather we think in random patterns, with diverse thoughts and ideas. Mind mapping in particular allows all those thoughts to surface, then be placed in an orderly sequence.

Importance of inclusion

In working with these tools, be sure that everyone's opinion is both requested and respected. This is particularly important in techniques such as brainstorming and mind mapping. Sometimes the most outrageous thoughts and ideas lead to powerful answers or solutions, or ways to proceed.

Landscape scenario

Throughout the rest of this section on proposals, we have created a scenario to help illustrate not just these exploration tools, but the entire proposal process. It is this:



You are a landscape architect. You are one of a number of vendors who have been asked to respond to a proposal request from a developer, Western Associates, to provide landscape design for a park in a major, new housing development called Glen Arran Estates. You have received the proposal package with budget details. There's a briefing the day after tomorrow.

Your own thinking

Landscape Scenario

Is their budget realistic?

I need to see the site itself to get a better picture.

How big is it, what shape's it in? Are there any trees?

Will the general public be using this area or is access only available to residents?

How close is this to the highway? Is it noisy?

The southeast section—is the client concerned that resolving the water issue to meet both environmental needs and limit flooding will cost too much?

How quickly do they want to proceed to site construction? Can we do something special or is this a rush job? This client has a reasonable reputation—we haven't worked with them before—wonder who has and if we can find out.

Brainstorming rules

- Write down every idea
- No censorship
- No judgment
- No evaluation
- No editing

Evaluate each idea. Keep those that might contribute to your proposal. Group items into categories to help you plan and set priorities.

Your own thinking

It's very easy to rush into a project without giving yourself a chance to sit back and look at the implications. I suggest that you relax and think of what this proposal about. In particular, try to understand what the client is thinking.

Take breaks to collect your thoughts. It doesn't have to be at the office—it can be down at the coffee shop, taking a walk—the choices are yours. Do it alone, do it with your team, but do it. And keep a notebook or electronic organizer with you, to write down any thoughts or ideas so they're not forgotten. On the page opposite is what I came up with in thinking about the Landscape Scenario.

Brainstorming

Brainstorming is a freewheeling session, by yourself or with others, in which you focus on the area you wish to examine. You let every idea about the issue come up, and, no matter how farfetched it seems, you write it down.

Start with a sheet of paper, flip chart or computer screen. If two or three of you are working together, have one person act as recorder to write everything down.

While brainstorming, check do's and don'ts:

- Do write down each idea, each thought, one after the other, wherever it comes from
- Don't censor yourself or anyone else
- Don't evaluate or judge anything

Once the ideas are down:

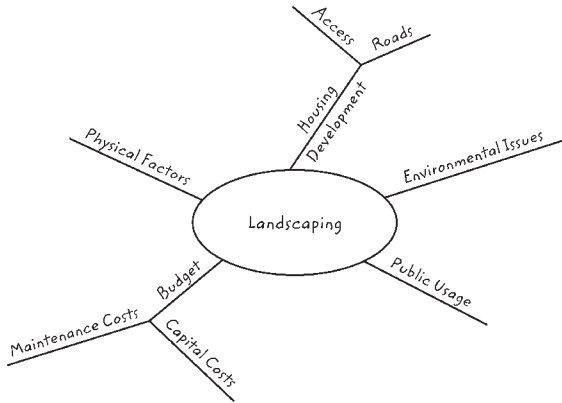
- Evaluate what you've got
- Eliminate those ideas that don't work
- Highlight those with the most potential and incorporate them into the information you are collecting

Once you've done this you can group items which fit together into categories to help you plan and set priorities.

Brainstorming is a great way to keep this freewheeling, thinking process on the move. Combining it with mind maps, however, can really make a difference.

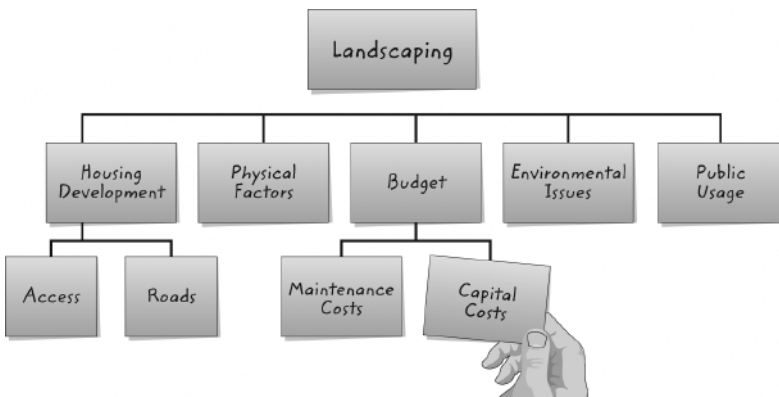
Traditional mind map

1. Take a sheet of paper, a whiteboard, or flip chart. In the middle write down the topic. i.e. landscaping.
2. Every thought, every idea about that topic goes down on the paper as branches on a map.
3. Each branch represents similar thoughts or ideas. Any new thought or idea pertaining to an existing branch is added to that branch.
4. A totally new idea receives a branch of its own.



Self-stick notes mind map

1. Write the issue on a self-stick note and place it at the top of the surface you're using
2. The main branch headings now head up columns in a line underneath the issue, like an organization chart.
3. Every thought and idea should be written on a self-stick note and placed below the column to which it pertains.
4. Create a new column if it's a different area altogether.



Mind maps®

Making a mind map, or mind mapping, is one of the most valuable tools I have ever come across (variations of this process are *branching* and *clustering*). You can use mind mapping for just about any planning or thinking—your vacation, developing your garden, and of course proposals, sales letters and reports.

There are two approaches to mind mapping—the traditional approach, and using self-stick notes, such as 3M's Post-it® Notes. Both approaches are shown on the opposite page.

Traditional approach

The top box on the opposite page sets out how to develop a traditional mind map. The end result is rather like looking at a tree from above. So far, five main branches relating to the landscaping topic, have been identified. They are housing development, physical factors, budget, public usage and environmental issues. The branches give order and flow to your thoughts and ideas. You often notice connections between the branches. As the mind map expands, these connections become more apparent and priorities start to show up. This is very useful in helping you analyze what you're working on.

Using self-stick notes

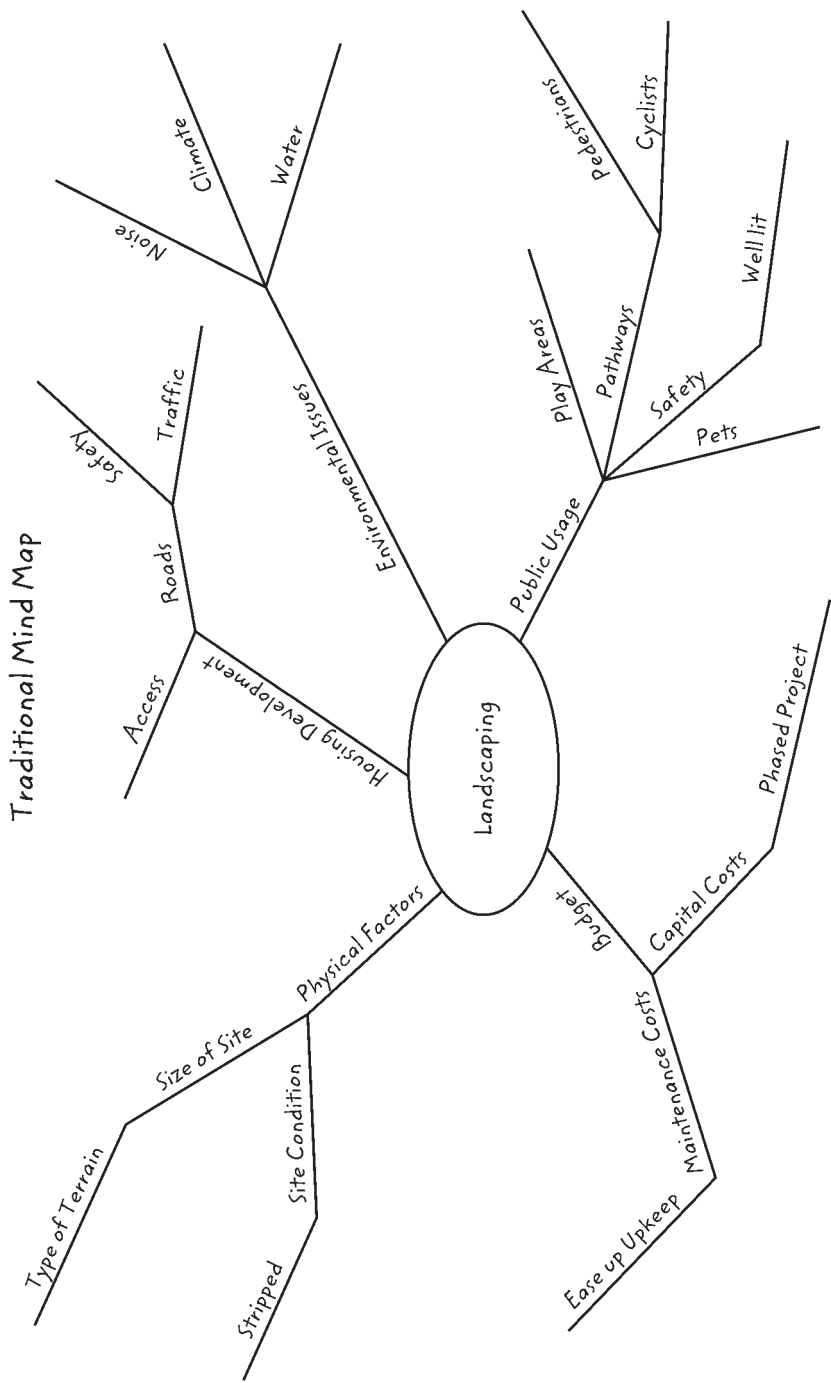
You need a surface, such as a wall, window, or flip chart. I like flip charts because they're flexible and the paper size allows for lots of space, very helpful when using self-stick notes. The lower box on the page opposite explains how to develop a self-stick notes mind map.

Now here's what's valuable about self-stick notes. The unique quality of the product lets you:

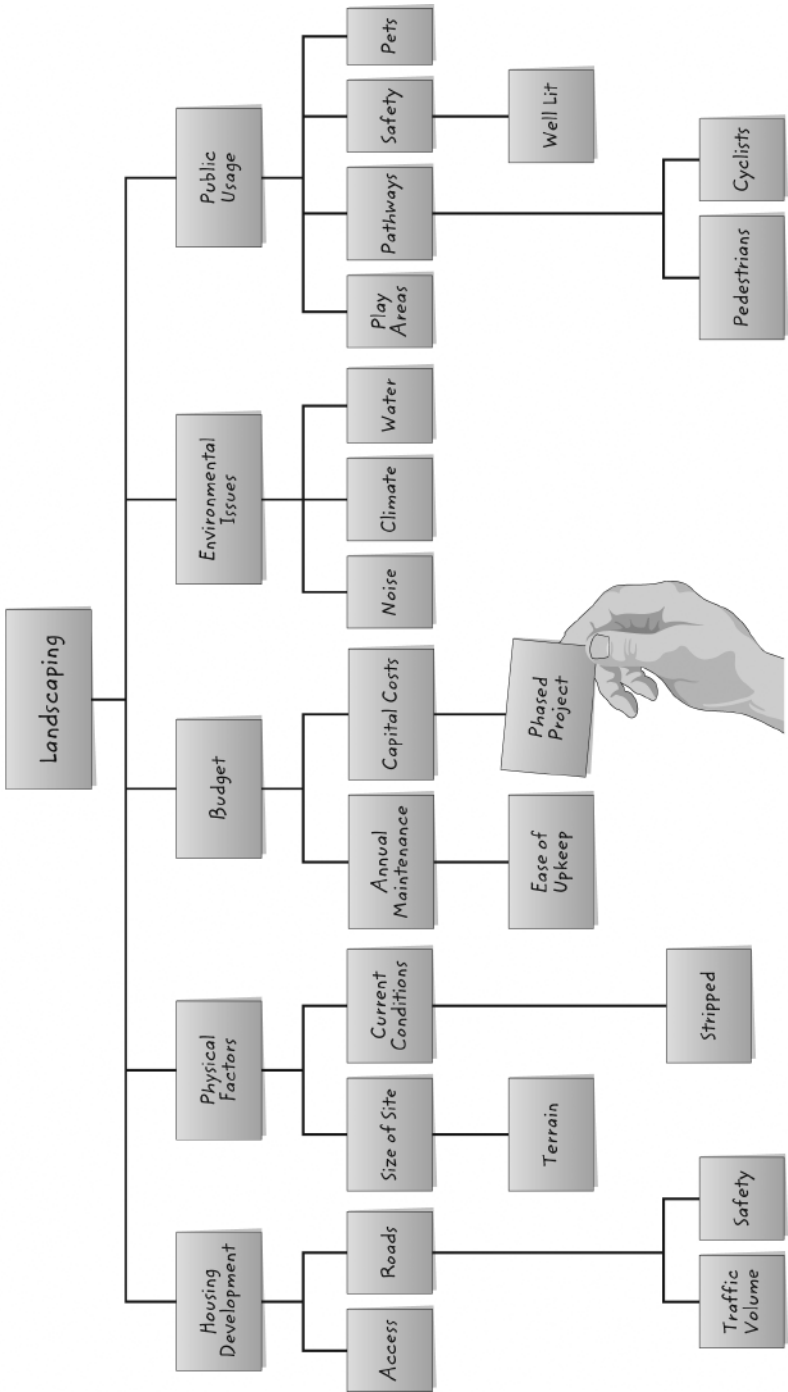
- *Move a self-stick note around.* If something doesn't fit in one column and belongs in another, you can move it there.
- *You can assess priorities.* When reading down a column and it's clear that one item should be ranked higher than another, you simply move it up or down.

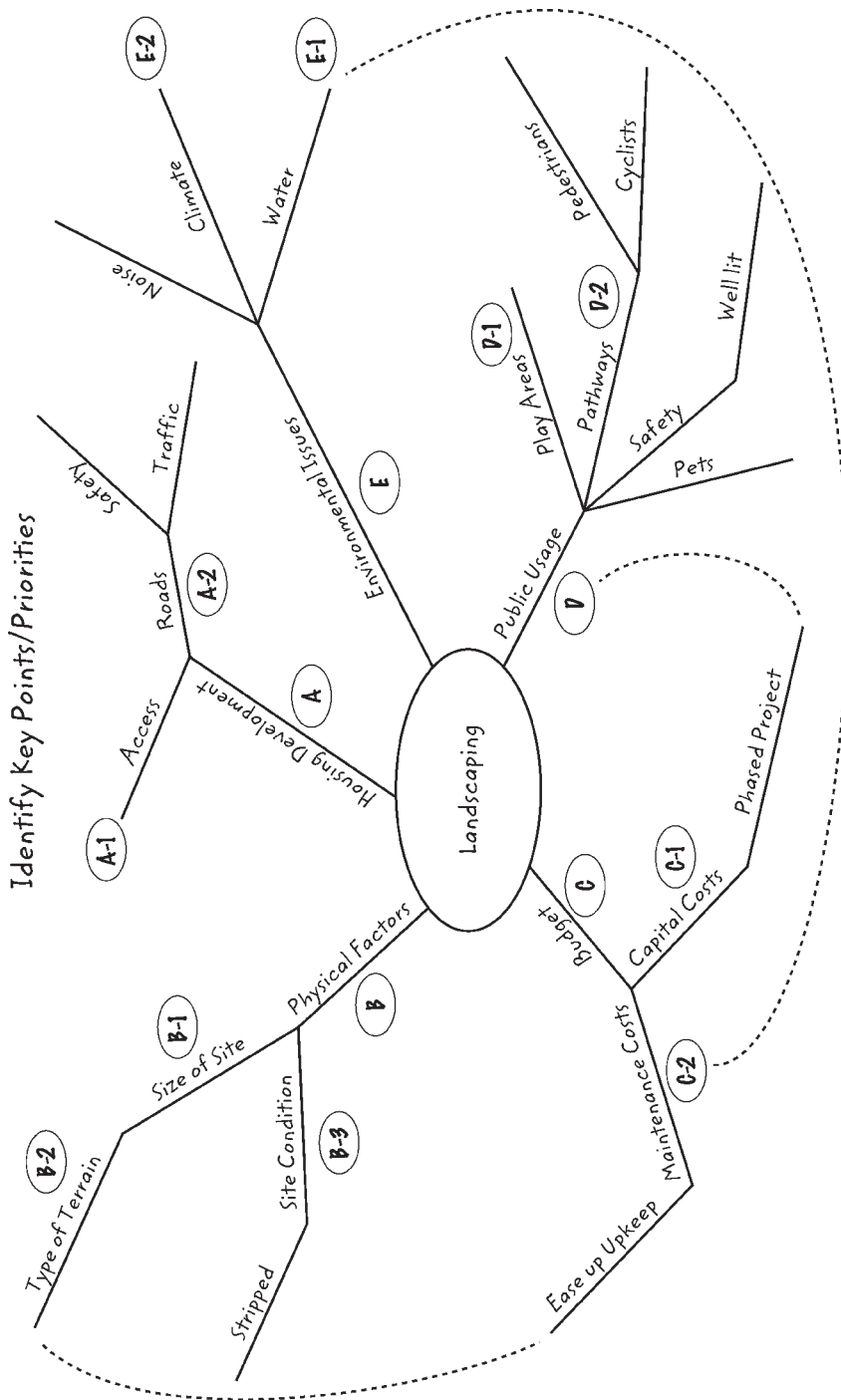
On the next two pages you can see what happens with these two approaches as more details are added.

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Self-stick Notes Mind Map





Mind map analysis

Once the information is down, analyze what you've got. Look for patterns. How does one branch (or column if you use self-stick notes) relate to another? What bridges could you create? What conclusions could you draw? In my experience, when you create a mind map, the important things seem to jump out at you.

A mind map can help identify alternative courses of action, their advantages and disadvantages. It can tell you where you're light or heavy on the work you've done. Do you need to spend more time in one area and less in another?

Identify the priorities

A mind map can be extraordinarily useful in identifying key points, or priorities. It will help you determine the kinds of things you want to cover or find out in a briefing.

When it comes to developing the proposal itself, numbering the priorities can give you the natural, step by step, linear outline to set out your material. In the Landscape Scenario, we have numbered the priority areas A through E, with A-1, B-1 and so on detailing subheadings under each priority. Here's the likely sequence for discussing the current situation together with the client's objectives:

- A. Status of the development itself. How many people reside there?
What about the roads?
- B. How big is the site? What's there now? What's the terrain? Flat? Hilly? What about soil or vegetation?
- C. The client desires an attractive new environment. There are reasonable dollars for initial capital costs, but the client wants annual maintenance costs to be minimal
- D. Full public usage of the area is desirable
- E. Environmental and safety factors must be observed

Freewriting

- Just write
- Give yourself a time frame
- Don't censor yourself
- Highlight new key points

Landscape Scenario: **Five minute freewrite**

Just thinking about this proposal. What general direction is the site facing? Is there a lot of sun into the area? Does it face west? People like to have sunlight at the end of the day. Now it would be useful if we surveyed any of the people who have moved into the development and find out what they would like to see. They're going to be using it. Do they want more pedestrian areas? Do they want a skateboard area for their kids? Reminds me—do we know the demographic? Is this a development which will attract lots of kids? How much should we prepare for them?

What do we do about water? I've been told that it may be a problem in the southeast area—there's a stream there and if we get heavy rain it tends to flood. Apparently the contractors had to watch that during construction of the homes. There's some thought that the environment people will want to protect the stream because it's rated a wetlands habitat. Will have to watch for that one. Who would we use to guide us on that one?

Back to the park—what kind of seating areas, or covered protected areas might they like? Should we have areas for dogs or not? Dogs are messy as owners frequently don't pick up after their animals.

Should we plan for drinking water fountains or is that too much of a problem? We don't want to make more problems and more maintenance than necessary.

Is there something imaginative we can do with trees? Like many developments, this hasn't many trees left—I don't think there were that many to start with—what would be a good mix of deciduous and evergreen?

Freewriting

Freewriting (or Rapidwriting) is similar to brainstorming in that you write down everything that comes into your head. The difference is that you can write down anything you want—insights, comparison of ideas, criticism of ideas, any judgments you want to make in the moment. Nothing is barred. Just write.

I've done this many times and it's remarkable what can come forth if you're prepared to remove self-imposed limitations and think *outside of the box*.

Rules for freewriting:

- Give yourself a time frame—it might be five minutes, 15 minutes, half an hour—and just write about the area you're dealing with
- Don't stop writing—just let the words and ideas flow
- Don't censor yourself, say this is no good, or correct anything

When your time is up, stop, then examine what you've written. You may be amazed at the wealth of information that can be generated from this simple exercise.

Take a highlighter and highlight the key points. If this is new information, add it to your mind map or whatever method you are using to organize your work.

When to use exploration tools

Exploration tools are valuable at any stage of the proposal process, from understanding the present situation, getting prepared for briefings, doing research, and, as you will discover, for writing the proposal itself.

Up-front information sources

The proposal package details:

- Situation
- What client needs
- Budget
- Timeline

Check the numbers

Use a spreadsheet to test any preliminary calculations against the client's budget. Can you work with it?

Briefings

- Client provides vendors with more information
- Vendors can ask questions and clarify any issues or concerns

UP-FRONT INFORMATION SOURCES

The two main areas of direct information are:

- The proposal package
- Briefings

The proposal package

The package supplied by the client provides you with the basic information; i.e. here's the situation, here's what we want, here's the budget and deadline. Sometimes everything you need to know is included in the package. All you have to do is develop your approach and submit your proposal. If you have questions you simply contact the client for answers or clarification.

Things are not usually that simple, however. If the proposal is at all complex, there will likely be a briefing.

Check the numbers

Assuming you know the client's budget, it makes very good sense to do some preliminary checking on costs, based on a possible solution to the client's needs.

This is one of the very important pieces of up-front work. Based on the results, you may decide to compete on the proposal, or decline the opportunity. A method many companies apply is to use a spreadsheet template to test a model. They plug in the client's budget figures and match these against the cost estimates of their model. If you do this at an early stage, you can determine whether the client's budget figures seem realistic. Vendors sometimes get in trouble because they jump straight to their solution without first doing any calculations.

Briefings

Briefings can be formal or informal. They may take place with all vendors in the room or via videoconferencing or conference call. They might also take place one on one, in person or by phone.

You hear directly from the client what the objectives are and the issues they face. You have the opportunity to ask questions and get those questions answered.

Pre-briefing

Preparation

- Review proposal package with your team
- What questions does it raise?

Landscape Scenario:

Questions about the project might be...

Is your company willing to look at additional capital cost expenditures if it can be shown that these expenditures will significantly reduce annual maintenance costs?

Is access to the park for residents only or can it be used by the general public? If so, what are the implications?

Research the client on:

- Issues they face
- Shape of their industry

Impress the client on:

- Quality of your research
- Your interest in working with them

Landscape Scenario: Your client knowledge

We understand that in a couple of previous projects Western Associates encountered some problems in overcoming environmental concerns. Our company has an excellent reputation in this area—environment department personnel have commended our approach in situations similar to the flooding/wetlands issues faced at Glen Arran Estates.

Pre-briefing

Come to the briefing well prepared

Read through the proposal package several times with your team so that you:

- Have an appreciation of what the client wants
- Are aware of what the proposal will entail
- Avoid misunderstandings
- Know what questions to ask in terms of clarification, issues raised, budgets and timelines

Any research you do will depend on the kind of information you need—about the market, about the competition, concerning any ideas you have, or plans you think will work for the client. Use exploration tools like brainstorming or mind mapping to help you.

Research the client

Make sure you do sufficient research on the client, even if you've worked with them before. Who are they? What business are they in? What are their expectations? Who are their key players? Who are the decision makers? What kinds of issues are they facing? In the industry? In the economy?

The more you can demonstrate your knowledge of the client's business, the more impressed they are likely to be about your ability to do the job, even before they receive your proposal. This kind of research has two major benefits:

1. You get a better understanding of the situation and therefore the potential solution
2. You develop a positive relationship—clients generally appreciate those who make the extra efforts to serve them and are more likely to want to work with them

Take key people to the briefing with you

If the proposal requires a team, such as for a major sales meeting, decide what kinds of skills you need on that team and assemble it. Then, if possible and practical, take these people to the briefing.

Take key people to the briefing

- Everyone hears the same thing
- Specialist team members can ask and answer key questions
- You build relationships with the client

Give the client added value

- Provide useful extra information and/or research

During the briefing

Listen and ask the right questions

- Listen for clarity
- Get all questions answered

Landscape Scenario

Some typical questions on finding out where a client “sits” in terms of relationship may be appropriate during a briefing:

Have you worked with other suppliers like us before?
How was that experience—and what are you looking for in terms of a relationship?

Avoid assumptions

- Assume nothing!
- Clarify issues by feeding back to the client what you thought you understood. They’ll correct you if necessary

The benefits of having team members present include:

Everyone hears from the client first-hand

If it's just you at the briefing, you may miss some element of the picture. Colleagues can raise important issues or questions you might not have considered. As well, the whole team has a chance to appreciate the client scenario—you're all on the same wavelength.

Building relationships with the client

Some proposals with which I've been involved were won as much by relationship as by merit. If two proposals are equally good and the chemistry with one firm is better than with another, the client chooses the one with whom they are more comfortable.

Bring added value to the table

Find a way to go farther, proactively, to assist the client. I once did some research on identification systems to give us a better handle on a video the client wanted for their new card ID system. This additional effort surprised the client and gave us extra credibility. In what way could you add value for the client?

During the briefing

Listen and ask the right questions

It's an obvious point perhaps, but important. When you take the time to listen to what the client has to say, you don't miss critical information. At the same time, ask the questions that came out of your pre-briefing planning to get clear on any issues. By the questions you ask and your knowledge of their business, the client will appreciate that you have done your homework.

Be careful with assumptions

I was once involved in a proposal to a major brewer. The briefing had come from the company's human relations officer and an outside consultant. We were at least one step removed from the president who was the decision maker, a situation I never like to be in. Our proposal was based on information from the briefing, which we later discovered was incomplete. Since the proposal failed to reflect what the client actually needed, it was rejected.

Assume nothing. Check your assumptions. Reflect back to the client what you *thought* you heard (or saw, or read) and whether it's accurate. The client will either concur, or correct your impression.

Confirm the budget

- If you don't know the budget, try to get the client to come up with an acceptable figure
- Give the client options if useful and appropriate

Who makes the decision?

Do those giving the briefing make the decision? If not, find out who does.

Know what the budget is

The RFP or proposal package will usually tell you what the budget is, or at least give a range. Obviously this is not true if the proposal is a low price bid on some lumber. In other circumstances the client might act as follows:

- They don't give a budget but say they have a "ballpark" figure in mind
- They ask what it would cost to do something (especially if you are the preferred supplier and there are no other vendors)
- They ask you to bid based on the information given

Let's say that a client comes to you and asks "Give us some idea of what it will cost to do X?" You estimate a figure you believe to be reasonable. If the client doesn't accept it, you have to find out what monies the client has in mind. A colleague uses a tactic like "Well is it as high as \$100,000?" "No." "How about as low as \$60,000?" "No." They edge towards numbers, going high and low, until some acceptable figure is reached.

Options

The client may be willing to look at options:

- What you could do for the budget dollars
- Break a project into phases:
 - we could do Phase 1 now for \$25,000
 - we could do Phase 2 in six months for \$35,000

Know the decision maker/s

I have been to briefings where we were assured that those providing the briefing would also be making the decision. Except it wasn't true. My experience is that knowing who the decision maker is almost always makes a difference. You know who you're dealing with. As well, make sure you know the decision maker's perspective on the proposal by checking with them to see if it agrees with that of other client staff.

Ongoing access to the client

Who do you contact if you need further information or clarification?

Competitive bid?

Is the winner the vendor with the best proposal or a client going through the motions to satisfy legal or corporate requirements? Try to find out.

Ongoing access to the client

If you're working on the project and need answers, where do you get them? Obviously you need to know who to contact if you have further questions after a briefing, or if there is no briefing. In my experience, clients are quite willing, within reason, to take the time to answer any questions you may have. To make it easier on their staff, however, they may require questions to be channeled through one person or department.

If you can get a personal meeting with key players, do so. If you can't do it in person, phone them. If you cannot get them by phone, e-mail them. They will usually respond. There's one very important point—the questions must be short and relevant to the proposal.

A word of caution. One of the conditions of a proposal might be that you may only go through the designated contact. If you have contacted other client personnel your proposal might be rejected—unless all competing vendors received equal access.

Is this a competitive bid?

Some organizations are required in their by-laws to ask for competitive bids, although they intend to give the contract to a particular vendor (who has worked well for them).

A production company I worked with received a request from a blue chip company to stage a half million dollar sales event. Several other vendors were invited. Some spent thousands of dollars to make their proposal.

Turns out that the blue chip company was happy with the vendor they'd used in the past and planned to give them the contract all along. They simply had to satisfy their legal requirements.

Try to find out whether the successful vendor will be the one with the best proposal, and not awarded by some other rationale.

Post-briefing

Ask yourself:

- Does this proposal:
 - interest you?
 - reward you enough?
 - interfere with other objectives?
- Can you:
 - meet the deadline?
 - work with this client?
- Are you qualified?

Consider declining if the answers are negative

The exception

Where a proposal offers a great opportunity to your career path

Plan the proposal with your team

- Discuss:
 - scope and issues
 - who should be involved
 - research to be done
 - budget
 - deadlines

Post-briefing

You and your team get together to decide the next steps.

Do you want to do this proposal?

I wish I'd turned down one project where the budget was far too small. We ended up donating thousands of dollars worth of time and effort that would have been better spent elsewhere. Consider turning down a proposal request if:

- It's not an area that interests you
- It's too costly or there's insufficient reward
- It will take up too much time or the deadline's impossible to meet
- There are simply too many competitors (one of whom may well be a preferred supplier)
- You're not qualified

This last point is very important in legal terms. You have to assess risk here in terms of liability. Are you confident that you are qualified to do the job and are willing to sign a contract to that effect?

You can decide not to make a bid based on any number of reasons, including those above. On the other hand, a proposal can provide a tremendous opportunity to learn and take you where you want to go on your career path. If that's the case, it may be worth going for.

Plan the proposal

You've decided to make a bid. Now you have to plan the work. Involve the team and bring everyone up to speed so that they can do the best possible job in their own areas. Questions to consider are:

- How big is the proposal?
- What areas does it encompass?
- How many people will it require?
- Will it need other specialized team members?
- How much time will it take?
- Who else should be involved?
- What research must be done?
- What's the budget and timeline?

Brainstorming and mind mapping can help you answer these issues. From this you determine what activities, especially research, have to be done.

Your time and resources

- What will this proposal cost you in:
 - salaries and fees?
 - equipment and supplies?
 - travel?
- Can your cash flow handle it?

Establish deadlines and responsibilities

- What has to be done:
 - by when?
 - by whom?
- Priorities?
- Schedule it; e.g.,
 - surveys completed (date)
 - first draft (date)
 - final draft (date)

Budgeting your time and resources

How much money and time are you willing to spend on developing your proposal? Typical questions include:

- Will you have to pay extra staff and/or consultants?
- Are travel costs involved?
- What are the costs for presentation, equipment rental, research, writing and printing?
- Will this proposal cause problems with other work?
- Can your cash flow handle the added expenses?

These are the kinds of questions you must ask yourself and incorporate into your budget model.

What are the deadlines and responsibilities?

Proposals are almost always deadline driven. Sometimes the deadline is extended—you can certainly request it. It's more likely that missed deadlines will eliminate your bid.

It's therefore very important to come up with a critical path:

- What has to be done by when?
- Who does it?
- What are the priorities?
- What is the impact on other activities?

For example, you might include information such as:

- Surveys completed by (date)
- Research analysis completed by (date)
- First draft by (date)
- Final draft by (date)

If you can, give yourself space between completion and the submission date. Then, if anything comes up at the last minute—new information, corrections, adjustments—changes can be made.

Be flexible

Proposals require discipline, commitment and a willingness to work late to get the job done.

Flexibility

Proposals have a habit of turning into late nights and overtime. They require flexibility and commitment.

What if a client needs a proposal tomorrow? I recommend that you still do a quick plan on how you're going to proceed, based on that timeline.

Be careful on what you agree to. Better to give a preliminary report, or decline the proposal altogether, than make promises you can't keep.

Next steps

Your post-briefing session determines the steps to take for the proposal to get under way. The next section deals with the research you may need to do in order to develop a successful proposal.