

PROFESSIONAL
PROPOSAL
WRITING

JANE FRASER

Gower

Professional Proposal Writing

Jane Fraser



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Preface

How did this book come to be written – and why should I be the one to write it? The story started a few years ago, when I was working as Editorial Director in an international communications agency, specializing in producing technical and marketing publications for the healthcare industry. Proposal writing was an important part of my job. Yet, despite my background as a professional technical writer, it was a challenge for which I was initially poorly equipped. What was the best way to structure a proposal? What style should it be written in? How could we demonstrate our capabilities to our clients in writing? How could we differentiate ourselves from the competition? What qualities distinguished a winning proposal?

To my surprise there were no ready-made answers to these questions. I looked in vain for the definitive handbook on proposal writing – in fact, I found that hardly anything had been published on the topic. So, like so many others before me, I learned on the job. I was grateful for the kind advice of colleagues who had been this way before me, and who had learned by bitter experience what does and does not work. Before long I was offering proposal writing advice to others, but still there was no simple how-to handbook to which I could refer them.

Later, when I established my own company to train people in business and technical writing skills, I found that proposal writing was one of the topics most often requested. Through the Continuing Professional Development Centre at the University of Oxford, I was asked to teach proposal writing to a wide range of businesses – from actuaries to engineers. I began to learn about the proposal writing problems faced by small entrepreneurial companies and large international organizations. I became aware of the challenges posed by competitive pitching to traditional professions such as accountancy and the law. Then I realized – it was time to write the book for which I had been searching all along.

Professional Proposal Writing is not an academic textbook. It is a practical handbook based on personal experience, plus the generous contributions of dozens of colleagues and course participants. It draws on many disciplines, from marketing to copywriting. It is intended to be read, discussed, argued with – but, above all, *used*. It cannot provide the answer to every question, but it can provide a firm foundation on which to build proposal-writing strategies that are right for *your* company. I hope it will play a small part in the success of your business in years to come.

Jane Fraser

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1 Introduction

Let's start this book with a basic question – what do we mean by 'a proposal'? This book is about proposals written by one company to persuade another, the client, to buy tailormade services or products. For convenience I've called these documents 'project proposals'. For example, a proposal might be written to persuade the client that your company is the best choice to run a conference, install a new software system, or build a new bridge.

Proposals are an increasingly common fact of life for all sorts of companies. In some industries, such as advertising, the proposal has always played an important part in gaining new business. In other sectors, the competitive proposal is a relatively new phenomenon, often arriving in the wake of new public sector regulations on 'compulsory competitive tendering' or 'market testing'.

Depending on your industry you might be in the habit of referring to 'pitches' rather than proposals. You may also talk about 'tenders' or 'quotes' – terms which often cover more than simply a price quotation. You may be in a profession such as accountancy where 'beauty parades' are becoming a common means of persuading clients to retain you on a long-term basis. The principles discussed in this book apply to all these situations.

Proposals and *your* company

If you are reading this book, you're probably already well aware of how important written proposals are to your company. For any firm providing a tailor-made service or product, or for any professional consulting organization, proposals are likely to play an essential role in winning new business.

Whatever business you're in, from the brash world of direct marketing to the more restrained environment of professional services, there is no getting away from the fact that *the proposal is written to sell*. Whether you're a metallurgist or a managing director, if you're writing a proposal, you're selling. You may be selling something tangible, or something intangible – an idea, a point of view, a method of doing things, even a person. Although you, the proposal writer, may not consider yourself a 'salesperson', that is the job you are doing when you sit down to write a proposal.

That doesn't mean that your approach should consist of a brash 'hard sell'. That's rarely the right path to follow. What *is* appropriate is a moderate, gentle reasoned approach which is nevertheless highly persuasive. It is possible to remain dignified and professional, and retain your integrity, while also selling your services as hard as you can.

This book concentrates mainly on proposals to sell to an external client, but proposals can also be used as internal documents to persuade senior management, or other parts of your organization, to take a particular course of action. The same principles can also be applied to internal proposals, as well as to such documents as grant applications and submissions to government and other institutions. Although you might not be 'selling' in the usual sense of the word, you will be using very similar techniques to persuade your readers that what you are proposing is the right – indeed the only – course of action.

The power of a well-written proposal

Clients often make important buying decisions largely on the strength of the proposal. Your company's proposal will usually

have to stand up to tough comparison with those of your competitors. In today's ultra-competitive market, a well-written proposal can make the difference between gaining or losing a contract.

So, it makes sense to ensure that your proposals are planned, organized and written to make the most of the sales opportunity the proposal offers. To succeed in business you need good ideas, but ideas alone are not enough. You have to convince your customers that you possess the competence, commitment and creativity to make your ideas happen. You need to be able to paint a picture of your organization and what you can do for your client. You must show your client exactly why they should choose you rather than your competitors.

Whether you're in market research or management consultancy, software or sales training, the proposal provides an invaluable means of showing what you will do, how well you will do it, and why you will do it better than anyone else. All this can be accomplished in a professional and dignified manner, through the strength of your arguments, the clarity with which they are expressed, and the concern for the customer that shines through in everything you write.

When customers have to make a choice between several proposals, there will often be little objective difference between what is proposed, or the cost of the project. This is where more subtle factors come into play. If the customer has to work hard to understand what is being proposed, because of poor organization, then your company loses ground. If the customer is confused by imprecise language, your credibility slips. If the customer is annoyed by wordiness, redundancy or irrelevance in the proposal, you may be about to lose the contract.

If, on the other hand, your ideas and arguments are presented in a logical sequence, you will carry your reader with you. If your analysis makes the customer feel that they are dealing with people who understand the problem and are confident of the solution, you're halfway to gaining their agreement. If you speak the same language, and show you share the customer's preoccupations and aspirations, they will look forward to working with you.

The proposal that conveys its key messages quickly, clearly and convincingly has a head start against the competition. By

contrast, the penalties of the ill-thought-out, sloppily written proposal are clear. Bad proposals lose business. You may feel that your good professional and personal relationship with the customer puts you in a privileged position, but can you be sure? Once a proposal is submitted it represents the quality standards set by your organization. A sketchy or sloppy proposal may lead to your being turned down by people you have never even met.

How this book can help you win new business

If you find proposal writing a depressing or daunting task, you're not alone. For many people proposal writing comes as an unwelcome interruption to their 'real' jobs. Whether you are a manager or a technical expert, a sales professional or a consultant, putting your ideas down on paper may seem a difficult and unrewarding chore, even though you know that no proposal means no business.

You may be one of the many people who are confident and polished speakers, but uncomfortable when addressing an unseen audience. You may be afraid of making embarrassing mistakes in grammar or spelling. You may be frustrated by the demands proposal writing makes on your time. You may simply feel you need help.

Help is at hand. *Effective proposal writing is a skill that can be learned.* There's no mystique. If you are a professional in business, you can be a professional on paper. If you can think logically and speak your native language, you can communicate your ideas. If you know your business and your customers, you can write a proposal that works. It's certainly not necessary to have a special gift for writing – good business writers are made, not born.

Proposal writing is an everyday skill like cooking a meal. You follow a recipe which will give you acceptable results every time. Naturally you can add or subtract ingredients to suit the tastes of your readers. If you do it well, your readers will come back for more!

This is a recipe book. It aims to help people in any kind of business write the kind of proposal that wins contracts. The practical tips and techniques it contains will help you produce proposals that are:

- clear
- concise
- well-organized
- accurate
- error-free
- lively and interesting
- pleasant to read
- reader-focused
- persuasive
- authoritative

The guidelines in this book will help you to write more confidently and more quickly, but most of all they will help give you the competitive edge you need to succeed.

Writing a good proposal is a sales task, not a literary challenge. You do not need to have perfect grammar or spelling, or to have been top of your class in English composition. True, minor mistakes in English can be irritating to your client and you should make every effort to eradicate them. Usually this is easily done by asking someone else to help you check for mistakes once the proposal is written.

As a proposal writer your first job is not to dot the 'i's and cross the 't's. It is to write the proposal in a way that is easily understood and gets across your key selling messages. This is not a mysterious process – there are rules that you can follow. The next chapters will tell you how to do it.

Proposal preparation

Chapter 2 describes the essential preparatory work that must be done before you sit down to write your proposal. In particular it examines the marketing decisions that must be made.

Structuring your proposal

To understand what you are proposing, clients first have to be able to find their way around the proposal. Chapter 3 describes the standard sections that are included in most proposals, and some variations on the standard structure.

Thinking and writing logically

A logical structure is kind to your client and creates a professional image. Chapter 4 shows you some techniques for ordering your material logically within the main sections of your proposal, and how you can use headings and other devices to guide your reader through the proposal.

Client-friendly writing

Writing to suit your client is all part of providing excellent customer service. Chapter 5 sets out some ground rules of reader psychology that will help you to structure and write your proposal in a way that demands the least possible effort from the reader.

Clear writing

A clearly written proposal conveys your ideas effectively and makes your client feel respected and cared for. Chapter 6 shows you how to write simply and concisely, making your proposal easy to read and understand.

Powerful writing

Chapter 7 teaches you some skills that are normally practised only by professional copywriters – highly effective techniques that will help you to sell your ideas with every word you write.

Selling the people and the company

Chapter 8 looks at what, for many companies, is the most crucial part of the proposal – the part that tells you about the people who will be working on the project, and about your company's track record. This chapter will give you some specific techniques for ensuring that you sell yourselves in the most polished and professional way.