The Proposal

Learning Outcomes

By the end of this unit the learner will be able to:

- ✓ Explore various steps involved in proposal writing.

The Proposal

The Differences When Writing Proposals

A proposal is primarily a sophisticated document that seeks to define problems or opportunities and to sell client or management support on your ability to provide solutions and strategies.

Proposals can be created because you see an idea and want to persuade someone to go along with it (by purchasing your product or services, or by agreeing with your persuasive arguments in a business case). Proposals are commonly used as a stage in the sales process, before a buyer makes a purchasing decision.

Proposals can also be the result of a large company or a government department issuing a “call for proposals” or “call for tenders.”

Tips for Proposal Writing

Like a report, a proposal is broken up with **headings and subheadings** to make the reading easier. Proposals can range from informal (in an e-mail) to formal, so again it is important to know your audience.

Proposals written in response to a **company or government request** are formatted similar to a formal report. In the call for proposals, there will often be a list of mandatory and optional elements to include.

Mandatory requirements mean that you MUST respond to those elements or else your proposal will be excluded from being considered. Some of the mandatory requirements can be extremely time consuming, and so we mention them here so that you are prepared to gather the information you need.

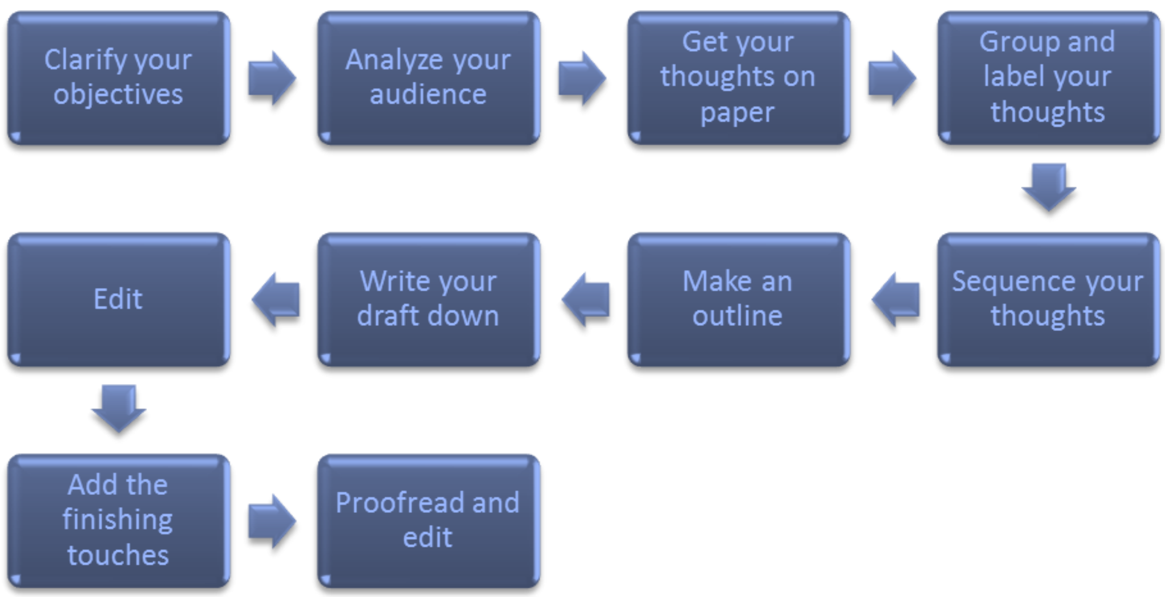
For example, one of our in-house trainers writes proposals for government. Depending on the government department, in addition to proposing the services that she could provide, she has had to include the following documentation with proposals:

- Proof of liability insurance
- Proof of company registration (incorporation and tax registration documents)
- Copies of health and safety policy
- Copies of privacy policy (so that they know what you will do to protect sensitive information)
- Reference letters and contact information so that they can verify your reliability
- List of qualifications of every team member that will work on the contract (which they may also wish to verify)
- Police background checks and/or fingerprinting for contracts that deal with sensitive government information

Because of very specific and detailed requirements in some proposals, you will need to start your investigations well before the deadline for your proposal. Letters of reference and proof of insurance cannot always be instantly produced. It is a good idea to keep a **master file** of information often needed for proposals, and to keep everything in it up to date.

Sales proposals for a business to **business (B2B) sale** or a **business to customer sale** can be short and straightforward. They often take no more than two to three pages to outline how your company can help your customer solve a problem by getting something that they need.

A sales proposal often **includes** a cover letter, an outline of why your company is a great choice, the details of what you propose (how it will benefit them in some significant way), the cost, and perhaps a deadline for when that price will expire.
The Ten Steps of Proposal Writing
The ten steps of proposal writing are:



Let's break these ten steps down.

Clarify Your Objectives

What is this report going to do?

- Tell or inform?
- Sell or persuade?
- Play a consulting role?
- Convince someone to do something?

Analyze Your Audience

- Who is your primary reader? Who is your secondary reader?

- What is the reader's knowledge?
- How will the reader benefit from your message?

Get Your Thoughts on Paper
Here are some intuitive methods:

- Mind map
- Brainstorming
- Free writing
- Sticky notes
- Index cards

Here are some analytical methods:

- Focusing (topics and subtopics)
- Five W's (who, what, when, where, why)

Group and Label Your Thoughts
Now, the outline begins. The easiest way is to sort your information by topics and subtopics.

Sequence Your Thoughts
Here are some ways to put your thoughts in order.

- Most to least important
- Least to most important
- Process
- Contrast/comparison
- General to specific
- Specific to general

Make an Outline
Now that you have your thoughts in order, draft them into an outline. Remember, this is just a road map, and it can be adjusted.

Write Your Draft Down
Using your outline as your road map, write out your draft. Then, let an outsider review it.

Edit

- Delete
- Keep terminology consistent
- Keep a consistent format
- Avoid buzzwords and jargon
- Write in the reader's language
- Don't rely on grammar and spell checks
- Have a low fog index

Add the Finishing Touches

- Use a readable font

- Include headers and footers
- Make use of graphics
- Include headings that speak to the reader

Proofread and Edit

This is the last step, although you need to run through it several times before you are really finished!

Test Your Knowledge

Group Writing Exercise

Draft a proposal for the following scenario: Your company has developed a machine that makes coffee from fair trade, hand-picked beans. It not only grinds the beans but also makes delightful coffee.