

# The Secrets of Writing a Winning Proposal

How To Take the Drudgery Out of Proposal Writing

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# 1

## The Reality of Proposals

Over the years I have worked on proposals worth a few thousand to a few billion dollars. I have served on the evaluation committees that review proposals. With a career in marketing communications, I am often drawn into the proposal process. Too often it is at the end of the effort with little time left to do much more than correct the most glaring of errors.

Creating stellar proposals to win the business this is deserved takes a little work along with some understanding of the reality of proposals. I will go beyond some do's and don'ts and discuss the proposal environment. I will explore the reasons some proposals succeed and others do not. I will provide suggestions on how to prepare proposals which will stand out to be successful.

One way to do this is to follow a logical format, to create meaningful and forceful sales arguments. I will discuss the argumentative logic developed by Aristotle, the Greek philosopher, and fine-tuned over thousands of years. Such a method provides the discipline needed to create accurate and substantiated, well argued proposals every time.

If there is one thing I have observed about proposals it is that too often they are an exercise in drudgery. It does not have to be this way. Granted the process is often unnecessarily tedious and fraught with peril. At every stage of development, mistakes can effectively obliterate any chance of success.

I often hear what seems to be a common complaint about proposals. It seems that there are never enough hours in the day to do them. One associate gripes that the only time he has are those precious moments in-between meetings. According to him, without his laptop, hardly any of them would ever get done.

No matter how much time is actually available, whether it is days, weeks or months, most of the work is invariably done at the last minute. Longer time frames simply facilitate doing other things. Then, in the face of this, deadlines sneak up, out of the blue, with no warning. This is unfortunate. One of the reasons there is so much drudgery in preparing proposals is that most of the people who do them are unprepared. Much of the work should be done in advance when there is time to do proper effective arguments.

Proposals come in many shapes and forms. There are formal ones such as responses to requests for proposals and tenders. There are informal ones; the "send me a idea" variety. And there are the unsolicited ones, involving initiatives such as cold calls or cold sends. No matter what the kind, they always seem to be littered with errors, mistakes, inconsistencies and lack both a focus and direction. This is even so of the unsolicited ones. These can be as ragtag as the

requested ones. One might think that unsolicited proposals should be spared the indiscretion of the ticking clock. Apparently, this is not the case.

What is most unusual about proposals is that even the bad ones, ones that should never accomplish anything, sometimes do. Invariably, once in while the worst proposals ever to land on the face of our planet do win the odd assignment or two. When this happens, I not only marvel but wonder what the other guys must have submitted.

The best explanation is that no one else responded; there were no other bidders. Or, and this is probably closer to the truth, the others were in much worse shape. It does, however, cause one to wonder. If these terrible proposals work, albeit occasionally, is the extra effort is really worth it in the long run? It is.

A friend has a theory. He claims everything works and nothing works. He prides himself that he is probably right a small percentage of the time. However, if I am running a business, and I have had such joy, I want better odds. I want guaranteed success. In a sea of mediocrity, it can be done. Proposals can stand out. The way to do this is to do most of the work in advance and spend the rest of the time finding out about the customer and the customer's needs.

A proposal is in many cases a major component of the business development process. It is a necessary evil. Some companies are in industries in which every dollar of new business is won by responding to proposal requests. Others are much luckier and can win business just on the basis of their own persuasive powers, charm or connections.

Those looking for government business are often drawn into the proposal cycle. They find it to be a very developed and strenuous process. Governments in particular, but other companies as well, request proposals from companies so they can put together a list of vendors approved to send in proposals.

Large companies almost mandate that their suppliers jump through a few proposal hoops along the way. In some of the larger companies that I have labored for, the purchasing department has been particularly adept at scrutinizing purchases. If something is to be bought they want to make sure the company always gets the best deal, every time.

There are many rules within purchasing organizations on how other departments can buy things. This often includes the selection, care and feeding of outside consultants and suppliers. These guidelines vary by company. Some assign blanket purchase agreements to select vendors and let managers select from a group of lucky suppliers. Others appoint vendors of record as single source suppliers for certain goods or services. At other times, contracts will be issued for specific projects. In these cases it is not uncommon for the purchasing company to also get involved in any subcontracts that its vendors may assign.

With all this proposing going on, it is any wonder that even small businesses are inviting potential suppliers to send over a proposal or two. Because of this, sooner or later, most people in business will somehow be sucked into the proposal process.

At first it is invigorating, a front row seat on the never diminishing challenge of bringing in more business. It is a feeling much akin to what our ancestors must have felt when they went off in search of food. It is certainly a good feeling when a proposal wins. That feeling is better if the win reflects an organization's ability to craft a sterling explanation of why its should do whatever it is that the customer wants.

All of this excitement, nonetheless, quickly dissipates as the preparation process drags well into the night as the dreaded document is pieced together, page by excruciating page. I must admit, I am as guilty as any one else for doing such. I have spent hours frantically searching for information and data from here and there and, at times, pulling it out of thin air. It is certainly not the best way to sell a personal service or a company. What is worse is that during the wee hours of the morning, some of the stuff that is assembled starts to look pretty good, at least to rather sleepy and slightly jaundiced eyes.

In the morning, for some unknown reason, everything changes. In the clear light of day, the once compelling copy that graced an assumed cohesive presentation looks rather pitiful. It is then when the mad rewriting effort starts in a race against the clock. Such an exercise rarely repairs the earlier version. Yet even more mistakes, typographical errors and misinformation are added to the hapless document.

At other times, the luxury of time is used to advantage. A reasoned, error-free document is produced. It smartly covers everything wanted by the prospective client. The organization waits on tenterhooks for the expected positive decision. It does not arrive, the news is not good. In these cases everyone who worked on the assignment have a right to feel rejected. Proposals are personal. They also have a responsibility to find out what went so horribly wrong.

There is good reason for doing this, if only to gain another chance to talk with the potential customer. Clever business-getters use rejection as simply another hurdle on the long road to success. They try to stay on the customer's radar and try to get permission to call back in a few months to see how things are going. Things could change and there could be a sizeable return on the original investment.

Finding out why can at least generate some feedback that can be useful in helping to guide the effort for the next proposal. As sure as night follows day, there will be many more proposals and many more chances to create the great winning treatise. Every bit of intelligence and constructive feedback has value in the proposal business.

Finding out why a proposal doesn't win can be shocking. Recently, a friend insists that I review a submission before it is sent off for consideration. I am impressed. It is a fine example of a well-prepared and documented proposal. In short, it is masterfully prepared.

It has a nice, coherent look to it. It is easy-to-read. There are illustrations and charts to round out the verbiage. It is, to all extents and purposes, golden. How could my friend lose? Could it be money? Somebody was willing to work for less? It turns out money is not the issue.

Frustrated, my friend calls the customer to follow up on the terse e-mail with the not so welcoming news.

Yes, reports the customer, in quite a friendly tone, the proposal precisely covers every question with exacting, well-thought out information. The company is quite impressed and puts the presentation at the top of its shortlist. Unfortunately, it quickly falls to the bottom once an equally well prepared competitor's document arrives. Two well-prepared documents, but only one is successful. My friend is expecting a little more than a pat on the back for a job well done.

Could there be more to this? It turns out there is. The customer goes on to explain that the top two proposals were almost carbon copies. He claims that there is very little discernable difference between them, to a point.

The successful bidder adds a little kicker, an alternative solution; neither requested nor expected. So compelling is this novel twist that the customer likes it immediately and makes the decision to hire the competitor rather quickly, if not instantaneously.

My friend, hearing this, is understandably devastated. He too could have suggested an alternative. He repeatedly brings this to my attention. I repeatedly remind him that while he could have done such, he took a different path.

At this point I notice that consternation is getting to him. As he talks, he plays with the top button on his shirt, undoing it and reducing the pressure of his tie. Tie loosening is akin to putting a pressure valve to work.

Over and over again he defends himself claiming he does exactly what is required. In the end, he accuses his competitor of not playing fair. It is true, the customer provided very clear direction. What the competitor reasoned is that the customer was lacking in understanding the situation and what is really needed. The competitor sees an opportunity and takes a gamble. My friend admits to this fact, but still defends his approach. He argues that he followed the rules and should have been told that they could be changed.

Not a wrong thought, but in business, what happens, happens. Proposals should represent best efforts but it is a competitive market. If someone else comes along with something better, they get the business. It is that simple, even if the other company changes the rules. This brings up a very real dilemma in proposal content preparation. No matter how good a proposal happens to be, the secret to its success often hinges solely on how well it responds to the customer's needs. What is critical in this is the proposal writer's ability to determine if what the customer claims to need is actually what is needed.

Granted, in formal tenders there is usually not a lot of room to maneuver. Some will even restrict such creativity. Decisions on approaches and solutions have already been made. Bidder judging follows a very rigid process. Not following the rules could disqualify the bidder. In other bids, there is considerable room to offer other ideas. Although admittedly, this can be risky.

Enlightened customers may see the proposed idea as having merit and may, as in my friend's example, embrace the thoughtful competitor. Other customers may be put off. They may feel threatened. They may consider the alternate suggestion as not being in their perceived best interests. Oh yes, politics can rear its ugly head in proposals.

How can this hurdle be removed? There is no alternative to doing some homework. This is why preparing proposals at the last minute could well be detrimental to a company's wealth. There is no discounting the value of a little up-front research. No proposal should be written in the dark, and I don't mean time of day. The more information gathered about the customer the better. There could be other things uncovered, like the customer is tardy in the bill paying department or doesn't pay at all. This sort of research is often called risk aversion.

In some instances, the research will be done by the customer and waiting among the bidding documents on a table at a tender or proposal briefing. At these events there is often a presentation and a question and answer session. Experts may be in attendance to explain, in greater detail, the full scope of the assignment.

Usually, all potential bidders attend. They look at each other, openly wondering about motives and what the other companies will propose. Some will try to flush out such information. Many of the competitors know each other and try to glean as much competitive insight as they can. It is always an interesting event, if only to watch politics at work. Attending these is always a delight, particularly if accompanied by a very knowledgeable guide who knows the ropes.

Project briefing sessions are well-structured processes usually overflowing with details. In other cases, proposal requests can be quite vague, even if surrounded with considerable documentation. Objectives are weak or of a general nature with strategies and tactics left up to the imagination of the bidder. A smart company may see an obvious approach that may not be so obvious even to the customer.

This is often routine in professional service contracts, particularly for customers hiring some kind of talent not available within their organizations. Without this expertise on board, these customers may not be all that good at effectively defining their needs or even understanding the problem and its solution. Such customers are often a delight. They love the expertise the outside supplier can bring. In a recent proposal, I elect to provide a complete solution. The customer is looking for a mere outline.

Such an approach is risky. The solution could be rejected. On the other hand, the outline could be rejected as well. However, by going beyond expectations I have the advantage of being able to present my work in greater detail. It is daring, but it works. I decide that my best course of action is to present what I think is best.

This is a big factor to consider in proposals. The participation decision should always be based on the suitability of the work being offered and the chance it presents to do exciting and interesting work. To do this a few things must be clarified in advance. First, is the effort worth the expected results? Will the business fit the organization's needs? Will there be an opportunity

to control the work and set favorable ground rules? If so, pull the stops out to win.

Winning is better when the bidder gets to help set some of the ground rules and this is precisely what happens when an innovative solution is offered. If the risk doesn't work, it can be rationalized that the business was not in the company's best interests anyway. Time can then be put to better use finding assignments that are more appropriate to its way of doing business.

In any event, a little advance detective work can often resolve this issue. One exception is a rare instance in which customers actually take a hand in writing the proposal. This is usually a factor of a long term relationship or the result of ongoing work. Or it could be that the customer has to justify hiring outside resources for some internal reason.

A note of caution. These apparently in-the-bag opportunities can be lost. While there may be limited or even no competition, the fact that someone is putting suppliers through the exercise should signal that someone else is checking on something. These proposals should take as much effort as solicited ones. I have done these a few times and what is most rewarding is that I have been able to actually bill for the effort.

Could there be nothing worse than losing a proposal prepared largely by the customer? Probably not, but, it too happens. Luckily I am without personal experience. Other associates have not been so lucky. An overzealous competitor, desperate to get the business, makes an outstanding offer that must be considered. In other cases, a weak proposal is offered suggesting that the customer is being taken for granted. It is enough to end the relationship and give the customer no choice but to find another bidder.

One should never discount the role of politics in the selection process. In cases in which a project involves a number of people on the customer side there is always the chance of a personality clash or some others want to bring their favorite suppliers into the food chain. Those preparing the proposal may be totally unaware of this set of circumstances. It could be the end of the relationship no matter how good the proposal is prepared. This situation is further acerbated by the fact that a document with no chance of success nonetheless has to be prepared.

On a brighter note, there are innumerable examples of how not winning doesn't always mean losing. My earlier-mentioned friend does win some praise. The customer is generous in complimenting him on how well his work is prepared and presented. As it turns out, the winning proposal and that submitted by my friend are of such high quality that all other entrants are immediately dismissed, not even given a second thought. If truth be told, the customer is rather happy that these other documents are so poorly prepared. It is easier to reject them and reduce the required reviewing time. This at least makes my friend feel a bit better, although, admittedly in business there are few prizes for being second.

I must clarify that, there is the odd runner-up award. An associate prepares an equally stunning document. It is a professional services capability document and does not offer an avenue for alternative solutions. In the end, however, she does not win although the exercise is a

good example of what quality can do. Six months later she is beaming, as if she had just won a new account. This contradicts the fact that her pipeline of new business is rather low and she has been rather discouraged over the past few months.

While this good humor seems out of character, given the situation, she does have reason to be joyful. The proposal that had long been given up as a lost cause is so good that it attracts considerable admiration on the part of the customer. So much so, that when a new project comes along, my associate is called and given the work without having to submit a new proposal.

Winning is always sweet. Before going on with how to win at the proposal game, I will take a deeper look at how to lose. I will review some real life examples of very bad proposals. This is all in the next chapter which begins on the next page.

# 2

## How to Fail

Some proposals are doomed to fail right from the get go. There are a number of reasons for this. To understand why is to know the difference between outstanding, not so outstanding and never will be outstanding. When properly assembled, proposals should clearly deliver the seller's best sales message. This seems to make sense. However, many a proposal is quite vacant in this department, almost, it seems, on purpose.

A proposal is a sales document. Yet many of them do not sell. In some quarters, selling is actually a bad word. There is an ongoing debate about this in the business development world. It seems that the greater a company's technical orientation the less emphasis there is on sales messages. As well, the greater the technical orientation of the proposal writer, the greater likelihood that sales messages will be avoided, sometimes at all cost. In both situations the real problem is that the concept of a sales message is not well understood.

On the other hand there are some proposals that, by request, have to be technical. Or do they? A proposal is not a technical document. It may have technical examples, it may be embedded with technology information, but it is not a technical dissertation. It is a sales document and because of this it should always have a strong sales argument. Bidders are foolish if they treat proposals as anything but sales documents.

With that said, it is also vital to have content in the proposal that matches that required by the customer's organization. To do this one must know the technical orientation and sophistication of those who will review the document. Better still what they are actually looking for from their proposers can be identified, the true story is needed. Understanding customer needs helps in the crafting of effective sales messages. To be successful, arguments must follow a precise format to spell out logically why the bidder is best for the assignment.

A good selling message is not hyperbole or fluff. It is a well constructed, sequential argument that reviews the facts and presents a solid argument. To illustrate this, imagine that the marketing and technical departments are charged with selling ice cold beverages on a hot sunny day. It is expected that we will end up with an advertisement that appeals to customer needs. The challenge is to sell ice cold sodas to people that are probably quite thirsty.

Marketing starts the project by hiring an advertising agency. Its research group works long and hard. It examines the market. It looks at the product and those of competitors. Most agencies begin this way to gain an understanding of the needs of potential customers. After all this marketing work is done, the assignment is turned over to the creative department and

assigned to a creative director and a writer. Some photos of hot days and families enjoying cold sodas are selected as the visuals for the ad and the following headline is produced:

“Great Cold and Iced On Hot Days.”

Is such a headline fluff? Ask people on a hot day when the sun literally exorcises the water from their bodies. That headline makes a lot of sense. It is directed at the customer, right where it should be. It hits the customer’s pain point, the need for a cooling beverage.

Now, imagine the technical department’s approach to promoting our soda. A team is formed and its members decide on a very technical approach. Instead of looking at the market, time is spent reverse engineering the soda to determine its contents and how it can quench thirst. Some heated debates are held about the suitability of some of the beverage’s contents. In the end it is not surprising to see an advertisement that is rather conservative, actually technical is a better word to describe it. The ad’s heading:

“How about some carbonated water, citric acid, sodium benzoate,  
sodium citrate, aspartame, phenylalanine and malic acid?”

Proposals do travel with such overwhelming baggage. Unfortunately, the key point of customer need is missed. Such proposals are too deep by half. They are ineffective at linking the proposer’s services with the customer’s needs. Only a chemist might love such a headline. For the rest of us it is hard to understand the link between all these ingredients and a hot day. Our technicians might argue that some of the customers for an icy cold soda are in fact chemists. Still, this headline and this approach is weak.

There is nothing in it to support the sale. There is no direction. It is bland and too informative by half. Getting business demands understanding what the customer is going to do with the product or service. It demands a presentation that is a well-thought out argument that the bidder has the capacity to meet the need. A list of chemicals is not a sales message.

There is another aspect to technical information. There is always the danger that too much can be given away. In the case of our soda advertisement, I might read the headline and wrongly assume that if I go down to the kitchen, put these ingredients into a cup, I can make my own refreshing beverage. No doubt I have a little phenylalanine and malic acid around somewhere. I might, but could I fashion a cold drink out of it? I don’t think so.

Somewhere in the middle of this, there is a trade-off between effective selling proposals and an accurate but un-motivating list of chemicals. Albeit, one can argue that they are apparently good for us. The key in this, and I am repeating myself, is to know the customer. Customer-centric proposals eliminate documents that are too technical or too light on the technology parts. Knowing customer needs and how to meet them is what I dub as Robert’s first rule. It is:

## **“Know Thy Customer.”**

I doubt, however, that this will solve the argument about technical content. For those finding themselves stuck in the middle of such debates and fighting against those wanting a heavily burdened technical document, here's a suggestion. The whole confabulation can probably be quickly halted by deferring to customer needs. Without question, even the most technical of proposals need a bit of selling pizzazz. Otherwise they are about as dry as the desert sands after a boiling day.

Reducing the depth of the technical content can also avoid another pitfall. Documents with too heavy a technical angle can give customers reasons for rejection. These documents may go too deep into the solution and expose processes or technologies that may be considered abhorrent by the customer. Such knowledge can lose the battle not win it.

There are a number of ways to review a proposal. One is to search for a compatible supplier. Another is to eliminate companies that are not as preferred. In the latter, customers may actually look for ways to discredit bidders. To do this, they review information with the idea of finding weaknesses. Too much information can be deadly. Success is all about balance and knowing what the customer really wants.

Get them both right and the proposal has a chance to be effective. Go too light or too heavy and the journey to new business could end up on a detour through a field of land mines. By being overly technical there is also the risk of exposing a company's technical secrets. Under current laws in many countries food manufacturers must list the ingredients of their products; largest quantities first. They do not have to reveal how they mix it all together to create a product. Effective proposals are designed to create an impression of competence and are not dissertations on how a job can be done.

There exists in many a company a degree of friction between the marketing, sales and technical departments. Technical departments live, breathe and eat technology. The rest of the world does not. Technical people, out of necessity spend time understanding how things work. Sales people devote their efforts to understanding what they do. There is a difference.

Proposals, to be effective, should focus on the what they do rather than how something works. Buyers are much more interested in what something can do than how it works. Proposals should always be written from a power of knowledge position, a point often missed. I once attended a proposal presentation from a software company. This experience brings two points home, technical people are not sales people and documents without sales messages do not sell.

Although it is a fairly well-known company, unfortunately, it is going through some rough patches. A quick fix is sought to remedy the situation. Someone at head office comes up with what seems like a brilliant idea. As a means of cutting expenses, the company simply fires its field sales staff but keeps its technical people. An additional burden is added to their responsibilities. They are now the business development department.

Of course, with money at a premium, this is all mandated without any training. They are sent off into the business development jungle with no tools.

The presentation I attend is very much like the proposal that is offered - dreadful. In fact, it is the proposal. A group of technicians take turns reading it. Throughout the debacle, they read face down, no eye-to-eye contact. What is interesting is that they all follow the same pattern showing conclusively that not one of them has been trained.

As might be expected, the proposal they leave behind has neither a beginning nor an end and, of course, no sales message. A number of my company's senior executives attend. It is an important piece of software that should help everyone in our corporation. These are senior executives with a wide range of backgrounds representing most of the disciplines at a modern university. It is not a technical audience, but a business audience.

The presentation starts with the room chock-a-block with senior executives and their assistants and even some managers. The audience quickly dwindles. The executives that are first to leave are quite polite. As the "event" progresses, the remaining ones, to put it politely, walk out quite abruptly.

Through it all the technical presenters go on and on. Actually, they are kind of glad some of the attendees leave. It is a crowded room after all. With less people, they stretch out a bit, and continue the drone of reading the proposal. At a number of points in this so-called presentation they mysteriously veer from the script.

They actually start discussing technical issues amongst themselves. It is apparent that all of the members of the presentation team do not agree with what is being read in a most monotonous manner. This is a curious reality about some proposals. The facts are not always correct or are open for discussion. If they can be debated, there is something wrong. The proposal should be a document containing factual and accurate information. It should never go out the door with information that is not perfect. The issues that cause debates should be resolved in advance. There should be solidarity among the team. Otherwise, if, by some miracle, the work is won, will the customer get what is promised if the team can't agree on what to do?

At times the discussion in the room amongst the technical crew comes close to full-scale arguments, but in a pleasant way. I find this less than amusing and notice that the proposal itself is equally off-balance and lacking in cohesion. The technicians have not only prepared a proposal without a sales message, they demonstrate that they really have no comprehensive understanding of the benefits of using their company's product.

There is good reason for this. Technical presenters have a segmented vision of the product that is relative to their areas of specialization. It is obvious that not one of the team members, at this presentation at least, knows the big picture. Nor should they given they are all specialists. If there is one thing to be said about a sales team, it is that most often, they know the whole enchilada. They have to understand all the details of a product to be able to sell effectively.

In this case, the proposal is not an enchilada but a buffet with an offering of disparate parts. It is apparent that no one at the company is able to help the technical crew process the thing into a consistent, easy flowing document. It is but a random collection of thoughts and ideas interspersed with technical detail. It lacks any kind of symmetry.

The presentation itself goes on for about an hour. During that time the presenters persist with reading the document. They show no concern that anyone able to sign a purchasing order has long abandoned the room. Talk about not knowing the customer. I guess if the proposers have no idea about who signs the check, then they might as well soldier on. This, of course, can waste a lot of time. Those remaining have their eyes on the pastry plate and conduct internal debates about how to politely grab another sticky bun before the plate is emptied of its tasty treats.

Later, I am called in to the office of a very angry company president who had calculated the manpower cost of this presentation. He assumes, wrongly, that I somehow had a hand in coordinating the fiasco. Luckily I did not but certainly came close to feeling how the proverbial messenger must have felt just before being shot.

So, what went wrong? First off, believe it or not, sales people are trained. There are quarters in which this is a subject of much debate. Some people like to think that sales people can't be trained; that they get all of their skills naturally. They either have them or they don't. This opinion is usually reserved for companies that are without training budgets. Smarter companies invest in their human resources.

Those believing in the tenets of the People Capability Maturity Model will remind us that companies succeed best when they employ trained people and let them work in the area for which they are trained. This approach has been proven to be quite effective. The model was released in 1995 as an offshoot of the capability maturity model for software (SW-CMM) developed by the Software Engineering Institute (SEI) of Pittsburgh, Pennsylvania's Carnegie Mellon University. (<http://www.sei.cmu.edu/cmm-p>). SW-CMM was born after a group of SEI researchers detected a distinct relationship between low skill levels and off-the-track software development projects that were dead ending and burning through a lot of cash.

The Model helps companies identify the strengths and weaknesses of their development and management processes. If nothing else, it is a sure way to keep projects on track and on budget. With it in place as a guide, expertise is there at the right skill level when it is required. All along the way, people that know what they are doing do their jobs. As the SEI tells it, this seems to have a direct bearing on project success.

There is much that we can learn from PCMM. Companies that are advocates of the Model would do well to feature it prominently in their proposals. With it, they can effectively illustrate that they have in place a process to match skills with needs. They can also benefit from the evidence it provides that they are interested in the best practices from disciplines such as

human resources, quality, knowledge management and organizational development. This is much better than vacuous statements about the importance of human resources. PCMM takes a company to the next level and offers some prove that it is leading-edge.

I assume, with some confidence, that the company behind the people in my software presentation is not using PCMM. The presenters sent to deliver the proposal are neither trained in how to write proposals nor how to give presentations. The proposal is as boring as the presentation. It is distinguished by the usual suspects - long sentences, even longer paragraphs.

There is no breathing room. Information is way too technical. At no time is there any link between technology and customer needs. It is filled with copious details and adorned with acronyms by the dozen.

This is not to say that technical information should be taken lightly. Many proposal requests will ask specific details about a technology or methods that a company employs to do its work. This should be a clue. It would seem that the customer, by asking, knows something about the technology. Thus the need is not to explain it, but to show how it can be used to the customer's advantage.

Technical detail remains important, but someone needs to be there to guide the technical people. If only to help them put their thoughts into a logical order and facilitate a focus on the issues or benefits that will win the sale. Admittedly, there is a difference between technical and consumer selling. In consumer marketing the emphasis is usually on benefits.

Often consumer marketers try to entice potential customers to buy things they really don't need. It is all part of present day consumerism where we try to create needs. In technical marketing, the need is there and well understood. The emphasis is usually on features.

Why the distinction? For one it is not uncommon for technical products, other than computers, to have been around for quite some time, a hundred years and more. Technical people study them in school. They know the benefits. What they look for is features, new twists on old ideas.

They want to see who can make an old dog do new tricks. If a company can, then this should be very evident in its proposals. Such a capability should be the foundation of the proposal. Before even starting to write it, however, time should be spent determining the potential customer's technical level. What technical details do they really need to know? With this information available, a document can be crafted that enlightens and supports the sales message.

There is value in scheduling a discussion with the customer's technical department. This also helps identify bidders that are very interested in the assignment. If such a meeting is not practical, other methods of discovery should be considered.

Company websites can have information about technology. There may be white papers. Trade magazines also offer guidance. Published articles may discuss the client or even have been written by its staff members. Other times other sources may be sought. The technical

requirements of the bid itself can be useful. I should clarify that I am not referring here to engineering proposals that are by their very nature technical. My points are more in relation to competitive product and service pitches that are not bound by specific technical details. However, even with the most technical of proposals, there is still an opportunity to sell and sell well and it should not be resisted. Selling increases the odds of winning if only by forcing some logic to the proposal.

The development process should include pre-determining what will win the assignment. This in turn should guide in the preparation of an appropriate argument. Knowing the technical level of the evaluators is critically important. The effort can also help identify some points that may help in building a rapport with the customer.

Whatever can be detected can also be a competitive advantage. Knowing more about the customer facilitates responsive proposals that are well ahead of the competition. It also helps to build confidence among those at the customer's company.

If the masterpiece that is created starts looking too technical, it is time to get professional help. Writers can always be rented and brought in to shore up the copy. Freelancers can help massage the copy so that all of its points are in order and the copy conveys the appropriate message. Selecting the right person is not often as easy as it sounds.

The process starts by reviewing some writing samples presented by candidates. This will provide a look into each writer's style and how they craft arguments. An outside source can bring considerable expertise to the preparation of a proposal document. Unfortunately, this expertise is often compromised by internal staff. The effort becomes one of trying to retrain the writer rather than benefiting from the writer's unique perspective.

This often happens in writing assignments where the client ends up doing much of the writer's job. This is not to say that the writer is not talented, only that the client isn't. Customers are usually not qualified nor have they the appropriate experience to be writers. Rarely does this fact deter them from rolling up their sleeves and killing what was once well written and well thought out copy.

In some cases, correct grammar will be changed because the client doesn't know the rules. This is frustrating to most writers. In other cases the text will be edited to death with all kinds of meaningless words added to obfuscate rather than educate the customer. Those tempted to be editors should think twice about it. There is a difference to reviewing copy and editing copy. Some large companies mandate that subject matter experts are in charge of the correctness of the material not the editing. This usually works out quite well and results in coherent, consistent and easy-to-read proposals. Hiring an outside resource and then having others repeat the work makes little sense. It also contradicts the PCMM concept. There is a clever website set-up by some creative folks that covers this; it can be found at [iamjack.com](http://iamjack.com).

Its creators are obviously discouraged by the fact that they are assigned a project based on their creativity and writing skills. Once started, their customers take over and do all their work for them. On the site is a quote from advertising guru David Ogilvy:

**"Do not compete with your agency in the creative area.  
Why keep a dog and bark yourself?"**

Visitors can also watch a video in which a man buys a dog and does the barking himself. It would be highly amusing if not for the fact it is too true.

One of the reasons technical people take over the proposal process is because they are not fond of working with the sales or marketing departments. I have heard the argument many times that sales and marketing folks tend to have short attention spans, don't sweat the details and shouldn't be involved. Don't believe it. The sales people are just adept at making their work look easy.

Many a proposal could benefit from someone with a shorter attention span. Particularly a person that is able to shape the copy into meaningful bites. Without question, sales people can aid technical people. They can guide them and bring relevance to their documents and their arguments. Sales people have direct customer contact and often know what can win the deal. Not using this insight is counterproductive.

Having proposals prepared by non-sales people could also be considered false economy. Some companies will argue that they need technical writers. They claim that only technical writers can bring the right perspective to an assignment. Those hearing this argument should immediately challenge it. Technical writers are adept at explaining things. Their work usually follows the sales effort, like the directions found with an item requiring some assembly. Good technical writers can help throughout the process. They can help bring the technical information to a level at which it makes sense to a variety of audiences and does not confuse the customer.

Some companies will say that their proposals are nothing more than technical documents. This is unreasonable. A good document is a mix of factual, well-written and presented information. A focus on technology can exclude selling points that are just as important and relevant. This should also cover the bidder's ability to deliver the technology. The content of the proposal must convince the customer that the potential supplier knows what it is doing and that it can deliver.

Flooding a document with technical data is not the answer. Presenting a logical argument that is reinforced with technical capabilities is a much better route to success. On top of this is the need to respond to the customer's issues or needs. In many cases technical information fails to do this. Without this in the document, customers have no choice but to make assumptions. This is not good. To avoid creating proposals that cause confusion, the best approach is to fortify the effort with an ongoing focus on the customer. This starts by determining how much of a technophile the customer happens to be.

This should be repeated. I have seen many a proposal, and sat in on many a presentation, in which the presenters seem to know nothing about the customer's needs. Let me give one example; a committee is looking for a consultant to help out on a very local assignment.

A large consulting firm is invited in and presents a very thick proposal document. On the surface, it seems to suggest that much thought has gone into its creation. It is very well put together without a blemish anywhere to be seen. However, on review, the selection committee finds its pages loaded with irrelevant information. As an example there are pages dedicated to the international scope of the company's operations. These are illustrated with nice pictures of offices in places like Brussels and Tokyo. None of this is of any relevance and the company is quickly scratched from the short list.

Another consultant's proposal hits the nail right on the head on the very first page. This appears to set the tone for a document that will meet the requirements. The committee members share their anticipation. They are quickly let down. Obviously some research has been conducted, but not enough. Unfortunately, it proves that a little research is worse than no research. While this company claims to understand the issue, it really doesn't.

Much of the effort in preparing the document concentrates on the first few pages which are then inserted in front of the company's standard pitch document. It is the only custom work in the whole effort. A quick read reveals that this is not a well-prepared sales presentation. It also reveals that while the company might appear to understand the issue, it does not understand the problem. Outwardly, the proposal appears to be quite professional. It has a nice format. However, there is no argument. Its contents are merely recycled from other proposals.

Previously in this chapter I spent quite a few paragraphs discussing the need to loosen up on technical details. This proposal, however, is notably weak in its technical documentation. So much so that the reviewers quickly doubt that the company is in fact capable of carrying out the assignment. Details are sketchy, at times contradictory and focused on resources in other cities. This argument is not logical for a local assignment. Admittedly, the document is very well written but not written for the intended purpose. It is a general presentation that is too general.

It becomes quite apparent that even high quality writing cannot disguise a missing sales argument. This proposal has veered too far off course. It relies too much on well constructed sentences that are not substantiated with evidence. It does not respond to the specific questions outlined in the request for proposal. When it does, it is almost by accident.

It is clear that the bidder is trying to shoehorn its way into the assignment with a standard one size fits all proposal. There is no evidence that any work has been done to make the proposal effective. In reality, most of the content is there. It is simply not tweaked appropriately to meet the customer's needs. A review committee will not guess, edit nor rewrite.

Information in the document appears to be pulled from a database and neatly compiled. Content goes on ad nauseam about things of minor import. Despite the initial enthusiasm, the

committee quickly and summarily rejects the proposal and the company with good reason. The firm does not present an argument. Like the technical soda ad, it presents information.

It is hard to understand how a company expects unconnected dots to ever be of value. It hopes to succeed on generalities and in filling its proposal pages with useless discourse. This often begs the question as to how much information should be put into a proposal document. My answer is simple. Each proposal should have exactly enough information to win the sale and only enough to win the sale. This assumes that all of the information is relevant and is client-focused. This is a point too often missed by proposal writers who like to stuff every last irrelevant detail into their documents; and I mean irrelevant.

Sitting on evaluation committees is a good way to really learn about the proposal process and to see first hand why a good one always stands out and wins. Such experiences can be very helpful to those who have to prepare proposals and will give them a new perspective and possibly dramatically change their approach to business. One concept that always draws favor and that works hard at winning new business is innovation, no matter what type of proposal.

This can be illustrated with a personal experience of mine involving a proposal for a multi-billion dollar project, that's billion. This is a very important assignment, to say the least. Much time is spent on writing and when all of the work is done, the proposal ends up about the size of a good novel. It is typeset and bound in the fashion of a book. As is true with a good read, the tome represents months of hard work.

On submission day, at the potential client's office, competitors arrive with boxes and boxes of evidence as to why they should win the project. Only two are really qualified. In the midst of competitors arriving with dollies overloaded with boxes, our fellow shows up with our whole argument under his arm. Within hours the client calls with an expressive thank you. We are commended for our consideration and ability to present only what is needed to win the sale. A few weeks later a second call is received noting that the proposal has indeed just won the bid.

Our proposal is factual, to the point, and easy to get through. It provides what the reviewers need to know. It is important to remember that people, usually a number of people, at the other end, have to weed through all of the information that is provided in a proposal. This can be a laborious process fraught with dangers. We are all humans and when presented with copious amounts of data and pages of facts, fatigue can set in. Some of the juicy points can be missed.

A proposal is a way to win business. It should represent best efforts. It should position a contender as a leader and prove it beyond any doubt. Every company does something exceptionally well. This should be reflected proudly in the proposal. I have seen some in which this leadership is hidden behind confusing run-on sentences teeming with strings of polysyllabic words. Rarely are there any periods. Sentences in bad proposals tend to go on and on unrelentingly. A lead sentence in a paragraph of one proposal has 42 words. This is interesting, until I read the second sentence. It clocks in at 43 words. Normally I do not count words, I try to

read them. But in this case I was lost and unable to follow where these sentences were going. This is not the way to write in a logical fashion.

Sentences should not require global positioning software to help the readers get through. If reviewers do not get the point, there is no way for them to stop and ask for directions. Proposals should be models of clarity. They should not attempt to confuse their readers. Doing so only heightens the chance that the reviewers will make the wrong assumptions and eliminate a viable bidder. Sentences must be factual and contain but one thought. They should also be variable with a range of say ten to no more than twenty words. Sentences in this book generally adhere to this rule. It makes reading easier. It also takes some editing and pre-thinking. It can be done. Because of the need for short, easy-to-read sentences, here is Robert's second rule:

### **“Sentences should have but one thought.”**

Long sentences are usually not sentences at all but paragraphs in disguise. What are held out to be paragraphs are often thinly veiled novels. Admittedly, proposals are information thick out of necessity. Customers often ask a lot of questions. To respond, answers need to be detailed. Customers do not, however ask for long, irrelevant, direction-less sentences.

A friend often complains about all the information he has to get into his proposals. I try to help and convince him to at least use some bullet points to break up the monotony. I am not a fan of the bullets. We do not think in bullet points; we are taught to read sentences not cryptic messages. But, as a replacement for long and winding sentences that are high on verbosity and light on content. I concede to the bullets. There are some in this book. They are true bullet points. They are short and to the point.

At times people forget the power of the bullets and hide whole sentences, and sometimes, paragraphs behind them. This is not the way to do it. Bullet points help to open up stuffy copy blocks and add some white space to the page, the publishing equivalent of fresh air. They also help to organize thoughts that may not need full sentences.

Long wordy sentences are not to be replaced with long and wordy bullet points. Bullet points also detract from the flow that writers create. They can be jarring and they do little to make the content of a proposal interesting. They are, by their nature, fractional thoughts. On their own, however, they should not be blamed for uninteresting proposals.

Proposals may need a lot of information. They also need a traffic cop to control the flow and ensure that thoughts move effortlessly through the copy and the many intersections that are placed in their way. Too often proposals resemble telephone books, thick on data, short on plot.

We are all human beings. We like to be entertained. In the United States, a puppeteer by the name of Jim Henson created one of the most successful educational programs in American television. Working with the nonprofit Children's Television Workshop, Henson introduced his Sesame Street in 1969. In the educational program, Henson effectively combines entertainment

with learning and brings to the world a cast of delightful characters.

Many of the children that were entranced by the antics of these puppets are now reviewing proposals. They have been taught that education can be interesting. I am sure they are wondering why proposals can't be as well.

As an aside, Henson actually produced these programs with sales messages. The letters of the alphabet are often credited as sponsors of each day's program. Thus, Sesame Street has everything a proposal needs: information, entertainment and sales messages.

Unfortunately, proposals often end up with only one of the three. They do not have to be tedious documents. Putting them together does not have to be drudgery. They can be written in a light, not lighthearted, but light manner. They can tell a story in an interesting way with anecdotes that bring points home. Some of this can happen with proper sales messaging. These can rescue some very dull and boring copy.

Having sales messages available implies that some thought has been given to a company's best selling points. There is possibly a strategy to follow. With this in place, there is nothing to stop the company from making its document a work of infotainment. If this can be done, reviewers will be so interested that they will quickly select the proposer's company.

Because of this, I propose a third Robert's rule:

**“Proposals should never be boring.”**

Proposals should about one of the most interesting things in a person's life. They are a way to put a company's best foot forward. Admittedly, what is boring to one person is not to another. Again, rule number one, “Know Thy Customer.” I think we all would be hard-pressed to find customers wanting to read something that can bore them silly. This does not include those with insomnia problems. Those who truly understand their customer's needs, should be able to write convincing content. It is almost a prerequisite to success. Capturing customer interest is immeasurably important in winning support for a proposition and respect. There are no prizes for boring a potential customer. In fact, I am sure that a number of proposal readers will agree with me that it should be considered a crime.

There ought to be a law that mandates that proposals have to be nicely coherent and interesting and have hard selling argumentative copy. This nicely leads into the next chapter on focus. In particular, I will discuss how to zero in on what is important and how to present it appropriately.

# 3

## The Importance of Focus

Proposals should have one direction and one voice and be coordinated from beginning to end. They should, and this is a revelation to some I am sure, actually have a beginning and an end. This can never be repeated enough. A proposal is not an assembly of unconnected points. Although this is how most are assembled. In the end, many a proposal is nothing more than a loose assembly of pages. However nicely bound, they often lack coherence.

How important is a beginning and an end? Imagine for a moment that a proposal is a car. A well manufactured car has a front and a back. A car resembling some of the direction-less proposals I have seen may be nice but non-operable. It might be wider than it is long. Its wheels are found at different places facing different directions. Given that proposal sections are often prepared by different authors, many of the parts of this car do not fit nor work together.

If proposals were cars, all of the problems would be self-evident. Unfortunately, proposals are not cars thus many of their idiosyncrasies are not always that easy to discern. A proposal can look very good but be valueless. It might be enriched with visuals, product photos, explanatory charts, even if they are not requested. On closer examination they are found to be non-supportive of the sales argument. Such visuals also play havoc with the review process and actually detract from the sales message and the presentation.

People get confused about the importance of pictures. They remember the old adage that each can take the place of a thousand words. They also suspect that illustrations can be memorable and, if we believe the educators, can increase retention. Retention should be the goal of a good proposal.

After reading a number of proposals, there is the danger that reviewers will become mesmerized with all the information facing them. They could find it hard to remember all of the details. This is why many reviewers are given forms to guide them through each bidder's entry. Along the way they are often required to assign weights to various competitive points. An effective and well-designed proposal helps them as they make critical decisions. Information is logically placed and easy-to-read and thus easy to score. It is also impactful and memorable.

Even well-prepared proposals must fight uphill battles. For the review committee, information overload can be an occupational hazard. This is particularly so when committee members deal with a number of very thick documents. A memorable one has a greater chance of success. If its arguments are cohesive and closely linked to the client's needs, success is almost

assured. The content will be remembered along with its sales messages. This is not all that easy to accomplish.

Making the content stand out can be as simple as the effective use of white space. Other tactics to consider are the use of action verbs and interweaving illustrations to reduce the size of copy blocks. A well-designed format can reduce reading complexity and bring attention to salient points. Careful use of repetition can help, but not overtly. Say the same thing but differently. Above all else, a clear focus and a clear direction will work wonders.

There is no value in loading every page with detailed information and pushing the margins to their physical limits. This will only make it harder for reviewers to spot key arguments. I think we all find ourselves with too many things on our minds these days. Reviewers are no different and find no joy to the trek through overly content-rich documents. Information not clearly presented can become confusing. After a while there is the very real possibility that reviewers will forget which bidder says what. Good points can be mistakenly ascribed to the wrong company.

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