

HOW TO WRITE COMPELLING PROPOSAL DOCUMENTS

Proposals are the Cinderella of pitches. They are often regarded as something of a chore, done at the last minute and under time pressure; they are seen as less “glamorous” than pitching to a client.

And yet, proposal documents are incredibly important; they could represent the difference between winning and losing a pitch.

The problems with proposal documents

Most bad proposal documents show the same problems:

- Your proposals are formulaic and look like all the other proposals you produce;
- Your proposals look just like everybody else’s proposal as they use the same formula;
- They are difficult to read, being too long with too much detail, and they often devote too much space describing the consultancy’s prowess (which reads the same as every other firm’s prowess), at the expense of focussing on the client’s issues.

How to put it right. 1 – send credentials in separately

The quickest improvement you can make is to send your credentials in separately from the main proposal document.

This shows you are highly responsive (most proposals only arrive just before the deadline); it may give you the opportunity to follow-up with the client and gain an insight into their thinking and, crucially, it does not detract from the main document’s client focus.

If you cannot bear to do this, then bind the credentials as a “volume two” to the main document, or order the main document so your credentials appear at the very end.

How to put it right. 2 – use a “conviction” structure and win by page 3

It is worth conducting a thought experiment. Read through a recent proposal and ask yourself the question: ‘at what point in this document will the client be so convinced that, all else being equal, they will hire us’?

I’m afraid for most documents that point never comes.

The most effective structure for proposal documents is the ‘conviction’ structure, so-called because (properly written) it elicits an emotional response in addition to the accumulation of logical reasons as to why your proposal is the right one – the response being ‘conviction’.

A typical ‘conviction’ structure would be:

Summary – no more than 2 pages and only required if the document is very lengthy.

The brief – this sets out your understanding of the client's requirements and has them metaphorically nodding their heads in agreement.

Challenges – this sets out the reasons why the brief is difficult. It should be possible for you to include challenges the client has not thought of (you are an expert aren't you...). This is done both to underscore the value of your work (defeating all these obstacles...) and raises the emotional temperature by introducing levels of difficulty not previously envisioned.

Strategy (or approach) and £ Value – explaining in overall terms how you will overcome all the challenges to deliver the brief, and explaining the £ value of doing so provides the emotional lowering of the temperature that helps create conviction.

And if by this point – page 3 or thereabouts - you have been able to encapsulate their requirements; highlight the challenges; explain how you will overcome them and the value that brings, then the client will be well on their way to being convinced, in part because your competitors' documents at this stage will be waffling on about how their firm is the most expert/providing tailored services/ partner-led solutions/ etc/etc. *The difference between your document and theirs will be stark.*

Work comes next, where you explain exactly what you will do.

Other including fee arrangements follows.

Appendices for important additional material completes the list.

Design makes the document easy to read

Make your document easy to read through the use of white space, graphics, highlighting and, importantly, section headings that are informative. Most section headings in effect say "you are here" (this section would be headed 'design' in most documents) and give little information beyond that.

Try to use the client's design standards, not your own firm's, in order to make the document seem more familiar, and don't ignore the valuable real estate known as the cover. Most covers are bland – use yours to stand out and say something important to the client.

Plan your document before you start writing it

The least efficient, most time-consuming, most difficult way to write a proposal document (most complex documents, in fact) is to just start writing. Because doing this you simultaneously Capture your thoughts, Arrange them, Edit them – whilst losing track of what you are doing along the way.

Instead, capture all your thoughts (ie all the points you wish to make in the paper) using Post It notes (or software like mind-mapping or author programmes); arrange your thoughts; and only once you are happy with this outline structure and content do you start pounding the keyboard.

ENDS

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