



The Consulting Process

**REPORT WRITING
PROPOSAL WRITING**

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Maastricht School of Management



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“Beneath the rule of men entirely great,
the pen is mightier than the sword.”

from the play *Richelieu; Or the Conspiracy*.
by Edward Bulwer-Lytton in 1839



**“Proposals present ideas
and persuade audiences
to accept them.”**

from **Business Communication Essentials –
International Edition 2010**
Courtland Bovée / John Till

Proposal writing in a Global Context

Training Outline

- I. Jordan-Sanodent focus: Presentation – Persuasion - ROI
 - II. Discussion: Your objective – Your perspective
 - III. Format and Structure
 - IV. Core Skills involved
 - V. Introduction: Proposal Perspectives & Purpose
 - VI. Essentials of a Proposal
 - VII. The art of Persuasion
 - VIII. The Intake Interview: asking the right questions
- ACTION – Proposal analysis**

Lunch





Training Outline

continued

- IX. Target audience: direct approach versus indirect approach
- X. Proposal Types/Formats
- XI. Proposal Strategies
- XII. Applying The Three Step Writing Process
- XIII. Distributing – Delivering – Presenting
- XIV. **ACTION – Case Jordan-Sanodent presenting DATA**

END



DISCUSSION

Your perspective - Your objective

- **Who** is responsible for writing reports & proposals in your organization?
- **When** was the last time **you** developed a report or proposal and for whom? Public sector/Private sector?
- **How** much time on average do you spend on report/proposal writing?
- **What** do you hope to get out of this training?

Format

**Regardless of its format and structure,
an excellent proposal explains:**

- ✓ Who and what will be involved in a project or proposed course of action
- ✓ Shows the project scope and required time line
- ✓ States which expertise will be involved and methodologies used
- ✓ How much it will cost *and*
- ✓ How the recipient and his or her organization will benefit (ROI).



Structure: the Strategy of Style

“If a man can group his ideas, then he is a writer.”

Robert Louis Stevenson 1878-1894

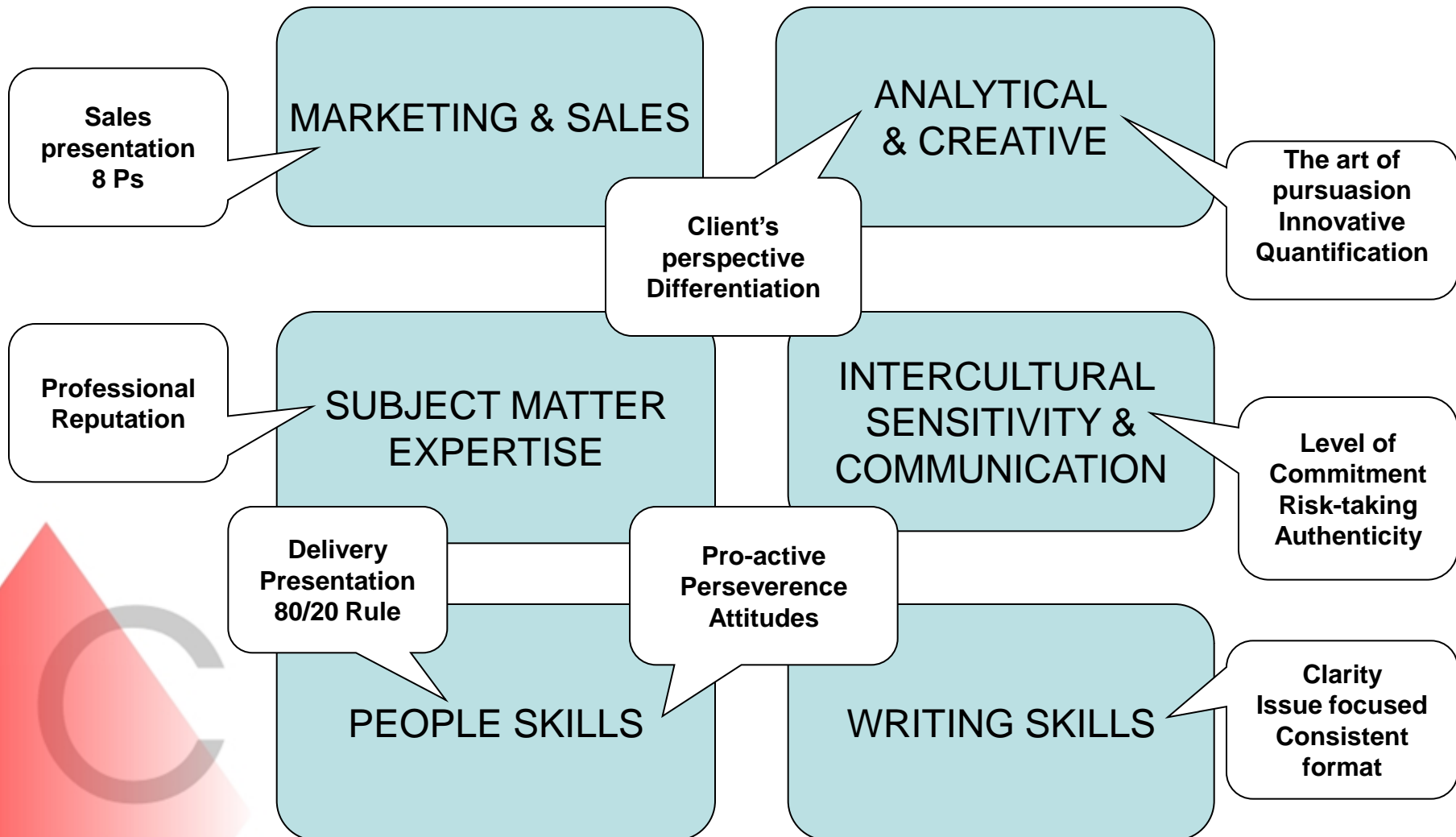
Beginning Introduction

Middle Body

Ending Close

Core Skills involved

to develop Winning Proposals



Proposal perspectives

PROPOSER'S POINT OF VIEW

BENEFITS

- Helping clients learn the value of using proposals
- Taking the initiative
- Inspiring the client's confidence in you

RISKS

- How much information do I give away in the initial phase?
- How much time/money am I willing to spend?
- Do I have the capacity and the competence to get the job done?

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"Intriguing proposal!
Give me some time to mull it over and co-opt it as my own."

Proposal perspectives

REQUESTER'S POINT OF VIEW

BENEFITS

- the client benefits by being presented with multiple analysis for his/her requirements; gaining a better insight into his or her real needs.

RISKS

- General business concerns
- Expected ROI
- His or her personal position is at stake!

★ **Everyone acts in his or her self-interest**



The bottom line is **PURPOSE**

- A proposal responds to a perceived need.
- In most cases, it must beat the competition
- It gets you to the negotiating table by communicating:
 - **YOUR understanding of the problem**
 - **YOUR understanding of the client**
 - **YOUR approach**
 - **YOUR skills**
 - **YOUR experience/expertise and**
 - **YOUR track record**
 - **YOUR cost estimate**

Essentials of a Proposal

In particular **the proposal should**

1. specify the objectives for and the approach to the assignment, **based on an agreed understanding of the problem**
2. **be a persuasive selling document**
3. **be the basis of a legally binding contract.**



The art of Persuasion

- Clarifying your purpose
 - Demographics – psychographics
- Understanding the client's motivation
 - Appealing to audience motivations
- Gathering information (closing the gap)
 - Selecting the right media
 - Organizing your information

The Intake interview

On average you have 20 minutes to find out:

- ✓ Who has something to gain/who has something to lose from this potential assignment?
- ✓ What will be the intended result?
- ✓ What is the ultimate Return on Investment company wide?
- ✓ How far away is the person you are consulting, from the ultimate result?
- ✓ What other factors are involved and influence the outcome?

✦ Do I fully understand the problem?

ASK THE RIGHT QUESTIONS...

Types of Questions

1. Probing questions (tell me more)
2. Clarifying questions (double check your understanding)
3. Process questions (put your customer at ease)
4. Empathetic questions (or statements: focus on customer)
5. Meta-questions (jog's customer's memory)

✦ **Always assume your assumptions are wrong**

LISTEN...



PERCEPTION

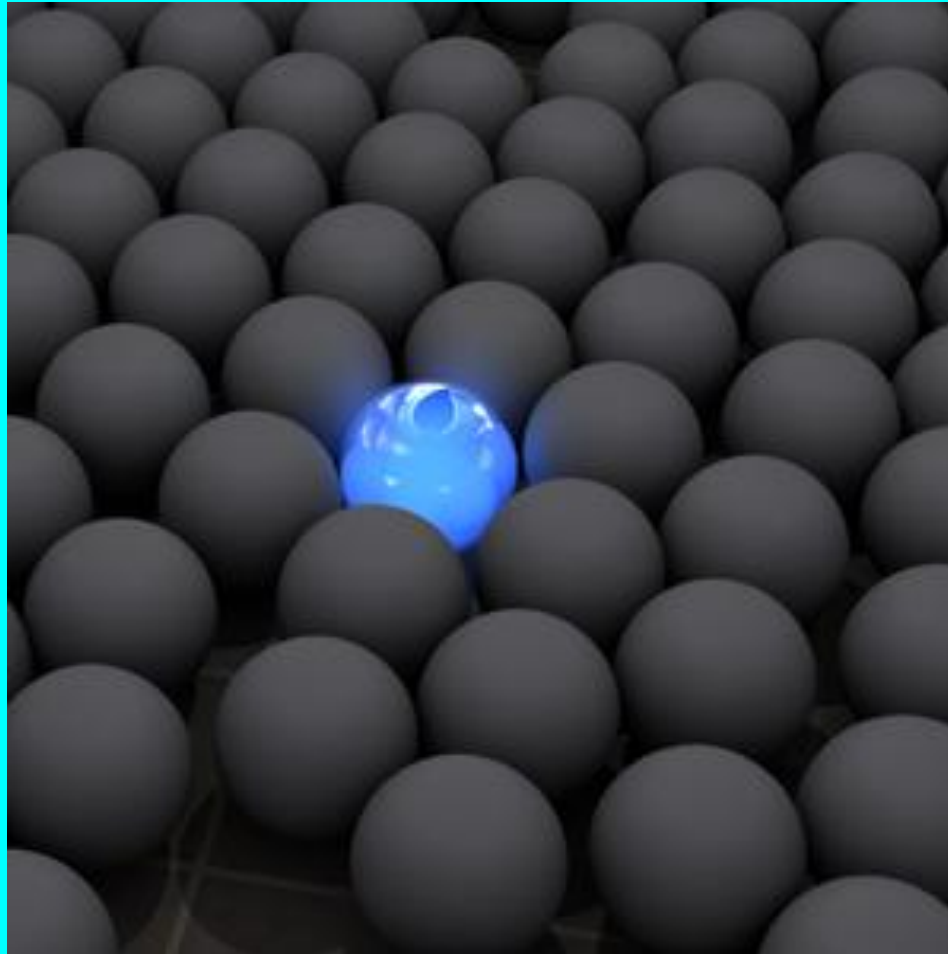
Others don't always see us as we see ourselves.

How do you want to be perceived?

Create confidence by

- + The **understanding** of the client's problem or need
- + The **proposed solution or approach** to the problem or need
- + Defining the **results (ROI)** that are to be expected from this approach
- + Track record: **verifiable history of success** at the task
- + **Testimonials** from former employers and/or clients
- + **Career history**: former employers, positions, clients
- + Formal education and **academic record**

Communicate your USPs





Which audience are you targeting?

Internal vs. external

Public vs. Private sector

Existing vs. new clients

**Competitive or non-competitive
environment**

Can you pre-determine their reaction?

Direct approach versus indirect approach

- Who are you developing the proposal for?
e.g. Existing client/new client/ recommendation/contracting
- Is the proposal solicited or unsolicited?
In other words:
Is your recipient expecting to receive the proposal?
Or, are you developing a response to RFP?

Direct versus indirect approach cont'd

- Which cultural differences (country, company, client) are you dealing with?
- Do you have a good idea of how your audience is likely to react to your purpose and message?

ACTION

Jordan-Sanodente Proposal analysis

**Study the proposal handout of Jordan-Sanodent
Compare the facts and ask yourselves the following questions:**

- What is the perceived problem?
- Which question did you wish you had asked Dorus Evekink?
In other words, which information is lacking?
- What type of proposal does Jordan-Sanodent expect?
- What would be the best approach/ strategy for this type of proposal?
- Who is your target audience?
- Which proposal phase are you in? (Final offer or initiating phase?)
- Element of competition: existing or non-existing?
- Solution offered: What is the Return on Investment?
- What is your Unique Selling Proposition?

Present your findings and your USPs to the class and persuade your audience that you have a 'winning' proposition.

Preparation 60 minutes
Presentation 12 minutes max
Work in your groups

Presenting the Proposal

Prepare!

- Identify with your **audience (communication style)**
- Develop a **fail proof speaking outline**
- Master a **powerful introduction & conclusion**
- Use **simple language** for maximum impact
- Use **effective body language** to enhance your message
- Use **appropriate illustrations and effective visuals**
- **Handle interruptions, feedback and questions**

Types of Proposals

FORMAL

- RFPs
 - NGOs – Donors
 - Grants - subsidization
- Contract Proposals - Bidding/tender
 - Business Proposals

Public sector procurement process



RFPs

Request For Proposal

Example: outsourcing is often used for managing IT

- Vendors time and resources are key
- So are multiple support interfaces
- Consistent Service Level Agreements (SLAs) compatible with internal service level reporting and measuring
- Ensuring business accountability – “no blame” scenarios
- Added value propositions: a single point of external contact

- 
- ✦ **Freeing internal resources for core business initiatives.**
 - ✦ **Encouraging competition**



NGOs

Non Governmental Organizations

Thematic areas include:

Micro Finance development
Human Rights/Social Justice
Education
Environment
Health & Reproductive Rights
Women Rights
Media Arts and Culture

Types of Proposals

INFORMAL

- Memo (internal management requests for funds proposal)
 - Business proposition
 - Sales presentation
 - **Letter Proposal**

Letter Proposal

=

Small-scale letter format of proposal

- Project scale
- Type of request determines components
 - Refer to basic proposal components to support your case

True or False?

Always determine your approach and strategy based on the presence or absence of competitors.

Pre-proposal strategies

Determine

- Who is the decision maker?
- When will the decision be made?
- How will the decision be made?
- At what level will the decision be made?



Identify the true Strategic Approach

Two broad strategies

- **Small contract** – sealing the deal
- **Large contract** – best-and-final offer and meeting with the client.



✦ **A go-for-broke win strategy is not an option!**

The Master strategy

- **Create a rapport with your client** as well as confidence, and openness to an alternative course of action
- **Refine the client's definition of the problem** in your proposal and offer what you think is the best possible solution.
- **Create a competitive strategy without making a direct reference to any competition.**
- **Consider and include all controllable and uncontrollable factors**
- **Communicate your disposition, your expertise**
- **Persuade the client** that your solution is the best or most direct way, to satisfy his needs and accept your offer

✦ **Educate the client.**

Other Major Strategies

Technical Strategy

includes

- approach to the solution, satisfaction of need
- characteristics of design, procedures, materials to be used
- special features, innovative ideas and use of specialist resources.

This strategy may be closely linked to costs and time schedules!

Cost/Benefit Strategy

is sharply focused

- ▶ Proposing the best solution (argument) at the lowest cost possible
- ▶ Knowing that cost is rarely the sole nor chief consideration in the client's choice
- ▶ Cost is relative

These matters may be closely linked with competitors and time schedules!

Presentation Strategy

sets a clear objective

- o Inducing the client to call for a proposal follow-up
- o You will structure and design your proposal to include this objective as the first step
- o You will do everything possible to induce the client to find a meeting necessary

Eg. Pique the client's curiosity enough to ensure that you will be asked to appear or to be cross-examined

The Three-Step Writing Process

adapted from Boveé/Thill, Business Communication Essentials: Pearson International Edition 2010

Planning

75%

Writing

25%

Completing

Prewriting
Analyze the Situation

Gather Information
Select the Right Medium
Organize the Information

1. Preparation

Adapt to Your Audience
Compose the Message

2. Production

Revise the Message
Produce the Message
Proofread the Message
Distribute the Message

3. Development

1. Preparation

- ❑ The basic sources of information
 - Conversations with the client
 - The client's RFP = study/analysis of the requirements and special research
 - The competition
 - Other client material: public information
 - Database management/ Market Intelligence
 - The WorldWideWeb/Blogs
- ❑ Your own experience, expertise, knowledge and judgement (personal proposal library and files)
- ❑ Existing methods and sources

Preparation = Planning

- ◀ **Analyze** the situation
- ◀ **Define** your purpose
- ◀ **Determine** audience needs: Satisfy those needs
- ◀ **Select** the right medium for delivering your message
 - ▶ **Organize** the information (subject headlines)
 - ▶ **Define** the main idea (from the client's perspective)
 - ▶ **Limit** your scope
 - ▶ **Select** a direct or indirect **approach**
 - ▶ **Outline** your content

2. Writing = Producing

Consider all relevant factors:

- **Draft proposal content using the outline**
- **The purpose: solicited vs unsolicited proposal**
- **Message type & length: memo, sales presentation, letter proposal, or RFP**
- **The format: formal vs informal proposal**
- **Anticipate audience reaction & determine the approach:**
positive (eager/enthusiastic/interested), neutral or negative (unwilling/uninterested/displeased)



✦ **First priority = to make your message crystal clear**



Proposal Content

- I. **Proposal introduction**
- II. **Proposal body**
- III. **Proposal close**

I. Proposal introduction

- **Background or statement of the problem**
Executive Summary: apply 80/20 rule

- **Solution**

- Propose a strategy

- **Scope**

- Range, compass, reach

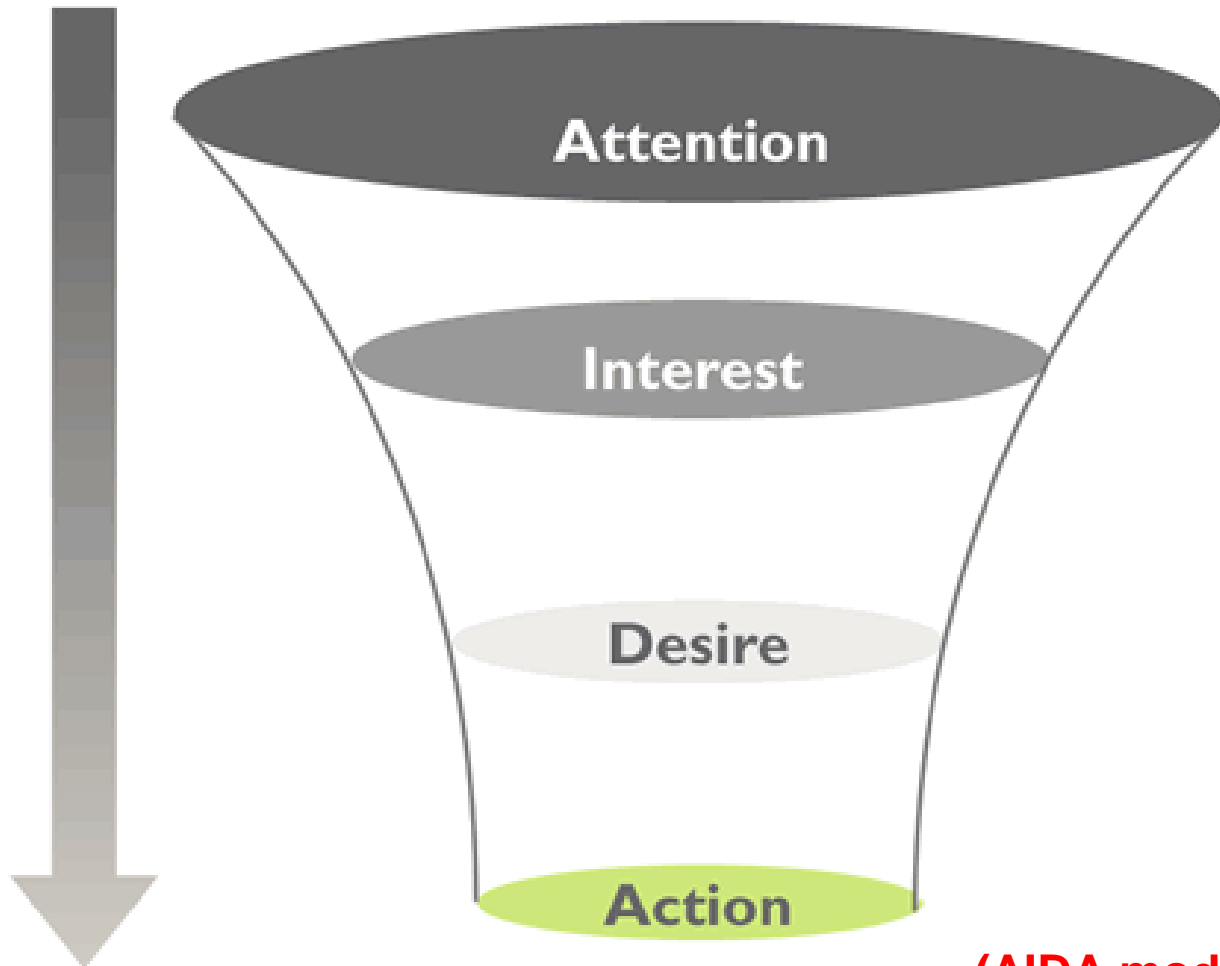
- **Organization**

- orientation to the remainder of the proposal

II. Proposal body

- **Facts and evidence**
to support your conclusions
- **Proposed approach**
readers look for evidence of practical, achievable solutions
- **Workplan**
within a specified time frame (time line)
- **Statement of qualifications**
tailor your Resume(s)
- **Costs**
Including terms and conditions

III. Proposal close



(AIDA model)

3. Completing = developing

- = Distributing and delivering the proposal
- = The art of persuasion: the presentation itself is critical
- = Follow up


All of the above is crucial!

Distribution

Always consider the total value of the proposal!

- Decide on delivery (certified mail or Federal Express)
- Make sure all links, graphs and other terms of reference work well by previewing these - use PDF
- When using intranet or extranet: set up your password in advance for entering the company system.

★ Meet the deadline: Be on time!



“The best proposal, at times,
is never accepted if
the interests of some central
people are ignored.”

Charles Oturi,
Synergy Excel Management Consultant
Nairobi, Kenya

THANK YOU GOOD LUCK TO YOU!

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