



# Creating Success with Effective Proposals

A presentation made on behalf of Birmingham AIA

by

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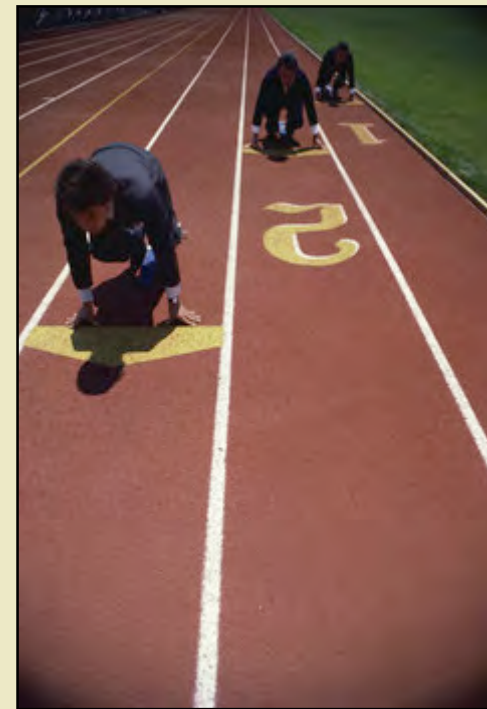
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- The Pitfalls in the Proposal Process
- The Process, Go/No Go
- Where to Begin
- Words Count
- Integrating Graphics
- Measuring results





# Send me a proposal

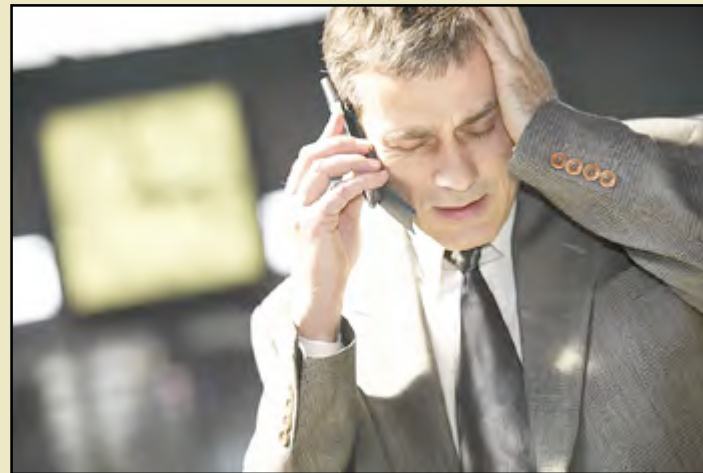
***Magic words – Send me a proposal***

**What do these words mean?**

*I am willing to take the next step and see what you've got -- what you're made of.*

# Send me a proposal

***Magic words – Send me a proposal***  
**What feelings do they inspire?**



Apprehension? Stress? Joy? Fear?

# Where We Fail

We quickly forget that we aspired to be at the proposal stage.

And, we are quick to forget that a proposal is yet another chance to be eliminated.

You were already a player, now the prospect is trying to eliminate players.



# Where We Fail

- You spent a tremendous amount of time generating the lead, but fail to invest the time required to go this last mile between prospect and contract
- Too much boilerplate stitched together in an obviously rushed process
- Not answering a question asked in the RFP
- The proposal is about you – not your prospect. Where is the solution for the prospect and their business needs?

# Where We Fail

Too often, the proposal has the attitude of the know-it-all kid with his/her arm in the air yelling, pick me, pick me!



In the most simplistic form,  
the keys to success are:

- 1. Follow the directions***
- 2. Write simply***
- 3. Customize and personalize***
- 4. Conduct a debrief***

## Why are you doing this?

**Your business goals, in the most rudimentary terms, can be summarized by three cornerstones of business:**

1. Provide a needed service to the client
2. Provide challenging, rewarding work for your staff
3. Make some money in order to keep doing No. 1 and 2

**Go/No Go – don't forget to review if you really should be even responding.**



Do you know your prospect?  
Do you know your market?  
Do you have the relevant  
experience?

## Strategic Issues

- Does the project meet specific marketing plan goals?
- Does the project fall in existing project niches?
- Are there expanded service opportunities?
- Does the project aid geographic expansion?
- Does the project have good PR value?
- Does the project offer opportunity for repeat business?

## Client Issues

- Have we devoted time to pre-selling?
- Do we have experience with this client?
- Is the client financial position adequate?



## Risk Issues

- Is the contract form known?
- Is the contract language reasonable?

## Competitive Issues

- Do we have similar project experience?
- Are the necessary personnel resources available to produce quality work?
- If a known “low-ball” competitor will be in the market, do we have a clear non-price advantage?
- Experience with other likely team members?

## Pricing Issues

- Is the “real” and anticipated fee fair?
- Is price the primary selection criteria?
- Will we be able to be competitive?

## ***Spending money to make money:***

Proposal development should never exceed  
3% of the potential win.



# Where to Begin

- Begin with the RFP. Read carefully. They wrote it that way for a reason. Follow the directions. Follow their order.
- If no RFP available, call for additional requirements. Be wary of those that say – “we just want to see what you come up with” as that same attitude may be the tone of your contract.
- Develop a matrix or outline before you even start. Determine what you need, what you have, and where to go for additional information

# Where to Begin

Do your homework. Don't shortcut learning about the group's wants, needs, subject knowledge, interest & motivation level, size.



# Where to Begin

**Create a database to maximize efficiency to include project information, reference letters, photography and graphics, quotes, proposal text**

*Garbage in, garbage out*

***Benefit:***

- Reduces stress and overtime
- Enhances quality of proposal
- Speeds up the learning curve
- Beware of canned text

# Where to Begin

## ***What they read:***

### **The Cover Letter:**

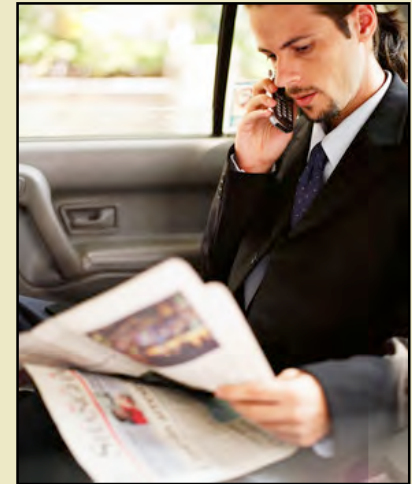
Discuss relationship and ask for work.  
Keep it to one page

### **Executive Summary:**

Precise recap of the proposal, including pricing

### **Pricing:**

Be upfront and explain what is included



## ***What the reader does:***

First and foremost, looks for reasons to disqualify you and make their selection process easier.

1. Didn't follow the RFP?
2. Too long, too short?
3. Boilerplate?



## ***What are people thinking when they get a proposal?***

- They say you can't judge a book by its cover. But we all know that your prospective clients will judge you by yours.
- Like it or not, everyone forms first impressions--it's human nature.

# Where to Begin

If you are still using the old standard one-inch side margins for proposals, stop immediately.



1. The most readable proposals had text running four inches or less across the page with graphics in the side margins or within the text.
2. Proposal appearance – only use 8.5 x 11 portrait, anything else will stand out as an annoyance.
3. Use the **bold**, *italic*, underline, and shadow functions.

# Where to Begin

- Be consistent throughout – make sure if you include years of experience on one resume, to include the same information on the others.
- Using the right kind of binding – can your reader turn the page, make copies easily?
- Use tabs to separate sections of the proposal.



# Where to Begin

Include the proposal question, in **bold** or *italics*, before each answer to keep the reader focused on your proposal.



When questions are not included, the reader must refer back to the RFP, which is very frustrating.

# Words Count

- Clear, concise writing is essential - make sure you proofread your proposal carefully
- Many proposals are reviewed by English teachers or administrative folks with a strong background in the English language.
- Few proposals would receive passing grammar grades.



## **Responses to Questions**

Answer questions directly, without hype. The shorter the answer the better. Selection committee members love one-word answers.

### **Question:**

*Will your project manager attend monthly meetings?*

### **Answer:**

Yes.

# Words Count

- The best way not to have your answer read is to put it in three or more paragraphs.
- Use bullets in lieu of paragraphs.
- Do not refer the reader to another section (see section three) in your proposal to find an answer.



## **Avoid jargon.**

Make sure you word your answers in a way that is clear to a layperson or appropriate to the audience.

Technical expressions may be okay for some proposals, but be sure you understand who is reviewing the piece.

## **Biggest mistake made!**

Compare the number of times  
“we” and “you” are used.

If “we” outnumber “you,”  
you’re out!

Just because you spell a word correctly doesn't mean that it's the correct word!

## **It's and Its**

It's is a contraction meaning "it is" while its is the possessive form of it.

## **You, Your, and You're**

You're is the contraction of "you are" and some people confuse it with your.

## **Lose and Loose**

Loose can have several meanings and is used as an adjective, adverb, or a verb. Lose is what happens when you misuse words in your proposal.

## **Compliment and Complement**

Complement is most commonly used to indicate that something completes a set or matches it well.

*When you compliment the wallpaper, you might note how well the color complements the carpet.*

## **Principal and Principle**

A principle is a basic truth, policy, or action. Principals are people who hold positions of presiding rank.

*A school's principal should always stick to her principles. The architecture firm's principal should also stick to his or her principles.*

## **Except and Accept**

Except connotes exclusion or something left out, like an exception to the rule. Accept means that you're receiving something, joining a group, entering into an agreement, etc.

## **Affect and Effect**

Affect is a verb: it acts upon something, someone, or an emotion, while effect is a noun.

*The so-called "Wealth Effect" affected total consumer spending and debt levels far more than economists anticipated.*

## **Peak and Pique**

A peak is the top of a mountain or the highest point in something's development or intensity. Pique refers to an emotion - usually anger or curiosity.

*In a fit of pique, the rock climber hurled his partner's favorite harness off the highest peak.*

## **Assure, Insure and Ensure**

Assure, ensure, and insure all mean "to make secure or certain." Only assure is used with reference to a person in the sense of "to set the mind at rest": assured the leader of his loyalty. Although ensure and insure are generally interchangeable, only insure is now widely used in American English in the commercial sense of "to guarantee persons or property against risk." I assure you that the insured property owner is taking steps to ensure your safety.

## **Moot and Mute**

How often have you heard someone insist: "it's a mute point!" Well, if it's a topic that's incapable of making a sound, they're correct. But more often they're really trying to say that it's a moot point - or one that's irrelevant.

*Since the point was already moot, Abby stood mutely in front of the teacher.*

## Special Bonus Error! Me, Myself and I

While most learned that "Bob and me want to go" is incorrect, they never learned the correct usage of the word me.

*Would you please call Bob or me before you leave? Is perfectly clear and acceptable.*

Wrong: Would you please call Bob or myself before you leave?

# Integrating Graphics

## ***It does matter how it looks***

Savvy marketers are beginning to pay much more attention to the graphical presentation of their business proposals.

Prospective clients facing the prospect of wading through stacks of proposals filled with thousands of words usually welcome efforts designed to make their lives easier.

# Integrating Graphics

## ***What should graphics be like?***

- "Decorative" graphics add style, not necessarily substance. They should make the proposal easier to read (formatting, borders, typestyles, headers and footers, company logos, and clip art).
- "Information" graphics add substance as well as style. They liberate the text through graphs, charts, diagrams, organizational charts and conceptual overviews that help make your proposal easier to understand.

# Integrating Graphics

## ***Graphic Ideas***

- Conceptual overviews
- Technical diagrams
- Business process flows
- Organizational charts
- Selected photographs
- Graphs and charts
- Illustrations
- Project timeline
- Maps
- Schematics
- Flow charts
- 3-D renderings
- Tables

# Integrating Graphics

## ***Considerations include:***

1. Guidelines or restrictions about graphics?
2. Where does it make sense to use graphics?
3. Who will produce the graphics?
4. Are the finished products professional quality?
5. Proper placement, in appropriate moderation?
6. Enhance understanding, or detract from it?

# Integrating Graphics

People look at images first, before they look at text, so graphics that are confusing, cliché, meaningless, unreadable, or possibly offensive, can quickly raise issues of credibility and unwanted questions and discussions.



Some proposal managers are hesitant to use graphics because of this risk, but their risk-aversion minimizes the potential for a big payoff, if graphics are done well.

# The Next Step...Presentations

You know that all your hard work preparing the proposal has paid off when you reach the critical next step....



**“We would like  
to schedule you  
for an interview”**

## **Back to where we started!**

Just like proposals, presentations create a wide range of feelings including fear, anxiety, stress and apprehension.



A person's fear of speaking could result in limiting his or her income.



As you present, remember that you are selling – you are selling an outcome.

## Interview Tips

- If you secure an interview, be prepared
- Anticipate questions
- Write out answers
- Re-visit your key messages
- Practice and role-play

## How to prepare for a presentation:

1. Hold a strategy meeting – craft issues/message, write agenda, select graphics
2. Do your homework – be prepared for the rehearsal and find out about the presentation room, selection committee, and other details.
3. Rehearse – two rehearsals are best – one for presenters to get comfortable with their speaking parts and a full rehearsal complete with props

**The most forgotten (or ignored) step  
in presentation preparation is rehearsing.**

***Why?***

Experts have found that one of the strongest signs of performance anxiety is procrastination. The real reason presenters avoid rehearsals is FEAR.




## ***Why you should rehearse?***

- Spontaneity –practice enables presenters to be spontaneous and flexible
- Competition – your competition rehearses
- Team Building – ensures that your team functions seamlessly
- Technology – make sure everyone knows how to use equipment and that technology does not overshadow or hinder your presentation.

## ***Key Point***

The client is hiring  
people, not your  
PowerPoint  
presentation



-  Don't distribute handouts before your presentation that match your presentation – why would they pay attention to you?
-  Don't overwhelm with too much data
-  No commercials, in-depth corporate history, etc. They already know that stuff. It was in your proposal.

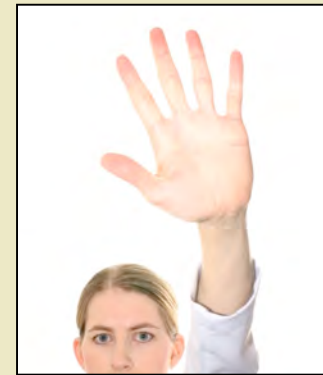
Talk with, not at, the selection committee.

When you make a person-to-person connection, you can convey how badly you want the project.



## Running Effective Q&A Sessions

- Set a time limit.
- Repeat the question.
- Be prepared with a few additional comments that may spur questions. "A lot of people ask, ...."
- If you don't know the answer, say "I don't have a complete answer for you. But I will get back to you with the complete answer within (time frame)."



## ***The Debrief***

### *Internal:*

What worked? What didn't? What can you do better? Take notes and refer to them as you prep for your next presentation.

### *External:*

Ask for feedback from the selection committee. You will learn a lot about your performance, as well as your competitors.

## ***Debrief Comments from Owners***

- Be appropriate. If we already know you, don't tell us your whole history.
- Big firms often use too much flash.
- Don't lose your corporate personality.
- Be concise and straight-forward.
- Most give more detail than you need to in the beginning.
- Be sure to leave time for people to process things and ask questions.

# Measuring Results

**Before your proposal goes out the door,  
be sure you can answer  
the following questions...**



# Measuring Results

- 1 Did we ask for the job? You must show the client that their business is important to your firm.**
  - Invested an appropriate amount of resources to produce a proposal that will impress
  - Made an effort to understand what they already knew, and the tailored their presentation appropriately
  - Researched their company and familiar with the problems they want to solve
  - Showed you real-world examples of how we were able to solve problems similar to theirs

## **2 Did we show respect for their time?**

- Planned the proposal in detail
- Selected the most relevant and appropriate info
- Presented the information in an efficient and interesting way

## **3 Did we respect their intelligence?**

- First impression of their company's intellectual capital
- Demonstrated their innovation and creativity by presenting information with a fresh approach
- Presented compelling images and concepts that stimulate their creativity

## **4 Did we show that we are critical thinkers who can figure out what's most important?**

- Clear and understandable message
- Prioritized the most important information, and gave it the appropriate role in the proposal

## **5 Did we show our passion for solving their problem or challenge?**

- Proposal is dynamic, interesting and exciting
- We obviously worked hard, and paid close attention to detail
- We care about what we do, and will care about the work we do for you

**The customer will remember  
ONE thing about you.**



What do you want it to be?



# Final Thoughts

**This concludes the American Institute of Architects  
Continuing Education System Program**

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