

What makes a good proposal?

Advice for fellow professionals

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A proposal is a document, sent to a prospective or existing client, that lays out a desirable scenario in which they (the reader) engage you (the writer) to provide some goods or services (usually in exchange for money). It is the reader who decides whether to accept your proposal (and thus give you the work) or not. So a proposal – whoever it's addressed to – needs to be a persuasive document.

In my professional career I've been both a proposer and a proposee, so whenever I'm writing a proposal I always have a few things in mind. Here's what I think makes a persuasive proposal:

It's what the client wants

- Put yourself in the reader's shoes – write with them in mind. What would **you** want to read if you were the client? How would **you** respond to what you're writing? What would you **think** about it?
- Your prospect wants what they want, not what you want to sell them. Given a choice between two equivalent suppliers, they'll buy the one who's clearly offering to provide what they've actually asked for (or at least, what they actually want, which isn't the always the same thing of course).
- In that case, show that you understand their need. Start with it. Play it back to them, as if you were saying, "*so what you really want to do is X*". Keep restating it throughout the proposal. Show you can capture it better than they can. Remind them that you understand the point of what you're hoping they'll pay you to provide.
- To many clients, your product, process or technology is not the need. It's not why they're thinking of engaging you anyway. It's the means to achieve a business result or ambition, not the end in itself. Talk about benefits for them, not your product, process or technology.
- Confirm their idea. Help them understand that you believe in what they're doing (because you do, right?). They need confirmation that they're not about to do something stupid.
- Sound confident. They're already out on a limb – thinking about spending a lot of money on something they can't directly control (you). They need your reassurance. This project should make their career, not break it.

- Remember that your intended audience may **pass the proposal on** to a colleague (often someone more senior). Make that person's job easy by making the proposal stand-alone and easy-to-understand.
- Get the proposal to them quickly. Once they've asked for it (or agreed to your offer to create it), they're ready to receive it.

It's personal

- Your proposal is one person talking to another, not two organisations negotiating a treaty.
- Clients don't buy services, they buy people.
- Clients buy people they trust.
- Clients buy people they like.
- Clients buy from people who **understand their problems** (or needs, ambitions, etc).
- What this means, amongst other things, is that where possible, and provided it's unambiguous, think about saying "you" and "we" not "Client Co Ltd" and "Our Co Ltd". "Our Co Ltd" won't do anything. "We", "our team", or "one of our experts" will do exactly what you need.

It has a friendly tone of voice

- Remember it's a person speaking to a person, and people buy from people they like.
- Although the proposal may be a legal document (at least if accepted), it doesn't have to read like one.
- Try to sound human. Seem real. Authentic.
- Don't be afraid to be passionate or informal. It's not unprofessional. It's much more persuasive and more personal. And personal is good.
- Try to minimise the amount of CYA. Don't say, "*variations in project requirements will result in inevitable delays and cost escalations.*" Do say, "*If your needs change during the project, we'd be happy to discuss how we could vary our approach to accommodate them.*"

It's good writing

- Clarity counts for a lot. Take a step back. Strive to bring clarity to the client's needs (that even they themselves may not have expressed), and to capture at an abstract level what you propose to do. Remember that **you** understand your well-practiced ways to carry out a project, but your **client** may not. It may be their first time.
- Make titles and subtitles work as a summary of the content of your proposal.
- Try to start sections with a summary, then add more detail. "*Our overall approach is to...*". "*We will do this by...*"
- Make key words **bold** (sparingly, or it loses its effect).
- Rules of rhetoric: lists of three are always good. They show you can summarise the topic, they make you look confident, and people want to clap when you're done. It's true.
- Short sentences add impact.

- And despite what your English teacher told you, it's OK to start the **occasional** sentence with *And*. Or even *But*.
- Write a good *Executive Summary*. Remember that the summary is just that — a **synopsis** of the content, not a **description** of the document. Don't say "*This document explains how we will satisfy your need...*". Say "*We will satisfy your need by...*" instead. Tell them the whole story in half a page.
- Formatting matters. It might seem trivial, or unnecessary, but good document layout makes the content easier to read, and communicates a sense of attention to detail (even if subconsciously). Most clients value attention to detail. Avoid widows and orphans, make sections fit on whole pages if possible. Remember the document will probably be printed. What does it look like?
- Avoid **jelly**. Jelly is all the extra material we throw at readers, hoping that some of it will stick. One or two carefully chosen case studies are better than a long list of possibilities offered in the hope that one of them will make the difference.
- And on that bombshell...