

10 Easy Ways to Write a Better Proposal Today



Hi, my name is Robyn Haydon.

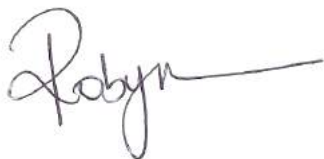
I help organisations to create value that supports new business acquisition, and to build their capability to win and retain business through competitive bids and tenders.

Since 2001 I have worked with more than 140 organisations in highly competitive industries like construction, community services, engineering, ICT, infrastructure and professional services.

These days I'm working to bring creativity, energy and enthusiasm back to the process of winning and serving customers. My goal is to build a legacy of strong, confident businesses and individuals who bring the best of themselves to bids, proposals and tender responses.

Whether you need to write proposal for the first time today, or are looking for ways to improve your proposal development capability, I hope this e-book will give you some useful tips and ideas to help you on your journey. If you'd like to know more, sign up for my weekly newsletter, [The Winning Pitch](#).

Happy reading!



ROBYN HAYDON

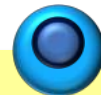
Business Development Advisor

Tip #1 Be clear about the task in front of you.

A proposal is just a means to an end. Your job isn't to write a proposal – it is to get someone to buy from you.

The role you will need to play to achieve this goal will be very different, depending on whether you are pitching to a prospect or a customer.

- If you're pitching to a prospect — someone you've never done business with before — you're a “challenger”. In this role, you may need to win the business away from someone else or to convince the prospect to buy something that they're not currently in the habit of buying.
- If you're pitching to a customer — someone you're currently doing business with, or for whom you have done similar projects before — you're an “incumbent”. In this role, you already have the business and want to retain it, or you want the customer to continue giving you repeat business in preference to competitors.



Change is a risk. If you're a challenger, the prospect will be looking for reasons NOT to give you the business.

Don't make this easy for them.

So which role are you playing today — challenger or an incumbent?

As a challenger (you want to win the business), your proposal needs to convince the prospect of your relevance. First, you must get them to notice you, then get them interested enough to listen to you. This is particularly true when you are responding to a formal tender request. Once you've done those things, you also have the task of getting the prospect motivated enough to go through the perceived pain and hassle of signing up - or changing suppliers - in order to work with you.

If you're an incumbent (you already have the business and want to retain it), your proposal needs to convince the customer that you remain relevant to them. Be aware that while change is a risk, they are also taking a risk by staying with you.

First, you must show them that you are not just resting on your (hopefully excellent) service record. Next, you need to present your vision of their future. Finally, you need to show them that you are continuing to innovate and build best practice in your business from which they stand to benefit.

If that sounds difficult, it doesn't have to be.

You simply need to keep these things in mind when you are planning your strategy and make sure you talk about them when you start to write.

Tip #2 Build goodwill by being upfront about what you can and cannot do.

A proposal is a lot like a job application. Any time your proposal is not congruent with who you are and what you can do, it's like an instant red flag that will send the buyer searching for other holes. There's a good chance you will spook them and never know why they suddenly went cold on you.

What if you have less experience than competitors, or a less than stellar track record with a customer you are desperate to retain? Unfortunately, glossing over the issue isn't going to work.

A study by John Paul MacDuffie of Pennsylvania University, published in the Journal of International Business Studies in 2011, identified three types of trust in business relationships:

1. Contractual trust;
2. Trust in competence, and
3. Goodwill.

Competitive tendering is built on the idea of "contractual trust". In other words, as a buyer, I trust you if you meet my minimum standards; are prepared to sign a contract that binds you to these standards; and where I have legal redress if you don't perform.

The other types of trust – competence and goodwill – are harder to establish, because they are based on how you operate on the job. While presenting past performance data does go some way towards establishing trust in your competence, it's harder to foster goodwill in a proposal, particularly if you have no prior track record with the customer.

But there is a way to do it.

Recently the business media was all hot and bothered about a 22 year old intern from San Diego called Matthew Ross, who the Wall Street investment banking fraternity were falling all over themselves to hire. What was so special about Ross, who was just as inexperienced as the thousands of other American undergraduates that apply for internships? Here is how he sold himself:

"I won't waste your time inflating my credentials, throwing around exaggerated job titles, or feeding you a line of crap about how my past experiences and skill set align perfectly for an investment banking partnership.

The truth is, I have no unbelievably special skills...but I do have a near perfect GPA (grade point average) and will work hard for you. I have no qualms about fetching coffee, shining shoes or picking up laundry, and will work for next to nothing."

I know incumbents who have lost business simply because they haven't owned up to problems that are obvious to everyone.

Likewise, I have seen long shots win by being up-front and honest about their shortcomings, and by demonstrating a willingness to work and learn (just like Matthew Ross did).

Companies don't buy things; people do. No matter what you're selling, prospects want to know they're buying from someone they can trust; who has expertise they don't have; and who they're happy to see and deal with on a regular basis.

Customers will expect you to have the right skills, products and services, but they place a higher value on attitude than you might think. That's because nothing is ever perfect. When things go wrong in the job, or the relationship - as they inevitably will - they want to know you're the kind of person they can work with to find a solution.

*“ Selling is a kind of
energy exchange;
it is always about people
and what they believe
about you. ”*

The more relaxed and confident you sound, the more attractive you will appear.

Being upfront about who you are and what you can do shows maturity and responsibility, and actually reduces the perception of other risks.

Tip #3 Know your audience.

- Who will be reading this proposal?
- What kind of things are they interested in?
- What is top of mind for them at the moment?
- If they do go ahead with this purchase, what will they want to achieve?

A proposal is just a conversation with a buyer that is conducted on paper. In many cases, your proposal will be read by more than one person who will influence the final decision.

One of the hidden reasons why proposals fail is because they sound like they're talking to no one in particular. So one of the simplest things you can do to write a better proposal today is just to start thinking about the people you are talking to, and hold a clear picture of them in your mind as you start to write.

Even if you think you have an audience of one, it's likely that your buyer will need to sell your proposal upstream to their boss or to another internal decision maker. Your job is to give them simple, compelling reasons to justify why they chose you that are easy for them to repeat to others.

Get to know your audience	Questions to ask yourself:
Who are you pitching to?	<ul style="list-style-type: none"> Does my proposal need to appeal to just one person, or more than one? If it's more than one, who is the most influential in making a purchase decision?
What does your proposal mean in their world?	<ul style="list-style-type: none"> What problem do they need to solve? How important is it that they solve it?
Be clear, timely and relevant in what you are proposing.	<ul style="list-style-type: none"> How important is this project or purchase to this person, at this time? What else is competing for their dollars/attention?
What will be on their mind as they are reading your proposal?	<ul style="list-style-type: none"> "What are the consequences if we don't go ahead with this deal?" "How risky is it?"
Try to identify every possible issue and objection and use your proposal to mitigate or eliminate them. For example:	<ul style="list-style-type: none"> "Will they let me down?" "Can we afford this?" "What are our other options?" "Do I like the person I'm going to be dealing with?" "Why should I choose this company over another?"

Tip #4: Think about what competitors will be proposing.

Over the years I have reviewed hundreds of proposals. Most of them look like they've been written in some kind of space-time vacuum where the only relevant thing is what the author wants to sell.

This is a competition. Others are also pitching for the business and some of them will have an attractive offer that the client will take seriously.

You probably know a lot about what your competitors are doing, but you may not be using this knowledge to position yourself effectively against competitors in your proposals.

Your proposal needs to present your offer in context of what competitors are likely to be proposing.

When you start looking, it's not uncommon to find that a strength of yours is a weakness for competitors, and your proposal gives you an opportunity to show how your offer is better.

Likewise, the areas where you are weaker may be a strength for competitors, and it is equally important to have a strategy to combat what competitors are offering and to minimise their appeal.



- What are my strengths?
- What are the strengths of my competitors?
- What are my perceived (or actual) weaknesses?
- What are my competitors' weak points?

For example, if you're a small business competing against a large organisation, you might want to emphasise how the customer will be one of your most important clients and is going to be a little fish as far as a bigger competitor is concerned. You could also point out the strengths of being small – you might have more innovative systems to offer; have developed specialist expertise in certain areas (where the large competitor is a generalist); and can show examples of how you have been quicker and more nimble when responding to customers.

Tip #5 Spend some time planning the structure of your proposal.

If proposal writing is just part of your day job, it's likely that it isn't your most favourite task. You are probably very pushed for time with other priorities and may be afraid that if you don't start writing right now the proposal won't get done at all.

It's tempting to dismiss the need to sit and plan out the content of a proposal because you 'just know' what you want to say. This is the wrong approach for a very simple reason.

The only real judge of the quality of a proposal is the customer it is written for. If you're writing the great Australian novel, just diving in and starting to write might be OK, because you're creating a work of fiction and therefore you have a lot more latitude to appeal only to yourself (or to a very wide group of potential readers).

But a proposal is an entirely different kind of writing with a very specific audience – and sometimes it's an audience of one. So unless you take the time to sit down and really think about what the customer wants and values, you will inevitably end up writing about things that don't appeal to them, although they might sound quite compelling to you.

It doesn't take long to plan content for a proposal, but planning makes a big difference to a proposal's quality.

Here are some basic things to consider.

Proposal planning	Questions to ask yourself:
Objectives	• <i>What outcome would I like to achieve?</i>
	• <i>What key messages would I like my audience to take away?</i>
	• <i>What would I like them to do as a result of reading this proposal?</i>
	• <i>How long or short does the proposal need to be to achieve my objectives?</i>
Content	• <i>What sort of information do I need to include?</i>
	• <i>What would be a logical sequence to follow?</i>
	• <i>Start with the big picture, with a more detailed and specific information to follow.</i>

Tip #6 Write in a way that gives a voice to your best ideas.

An author is just the originator of a written work. Everyone has the potential to be an author.

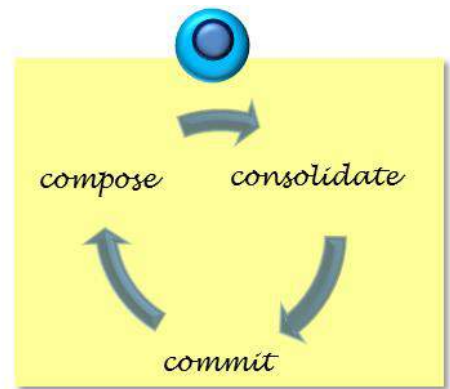
Napoleon Hill, the author of *Think and Grow Rich* - one of the best-selling books of all time - said: "First comes thought; then organisation of that thought into ideas and plans; then transformation of those plans into reality. The beginning is in your imagination."

When you need to write something important like a proposal, the pressure to perform can leave you staring at a blank screen. That's because computers are not ideal for creative work.

The words for your proposal don't originate on the screen; they originate in your mind - as thoughts. For most of us, it's more natural to speak our thoughts than to write them.

A great way to start writing a pitch or a proposal is to record yourself talking about it. Imagine what you would say if the customer was in the room with you.

This is a technique I use with 'reluctant writers'; people who are articulate speakers, and great in front of customers, but who would rather open a vein than commit their thoughts to writing. It's empowering to know that any idea you can talk about convincingly can ultimately become writing. Here's how.



Step 1 – Compose. Try out your idea anywhere, anytime by recording yourself talking with a voice recorder like the Voice Memo on the iPhone. Replay immediately to spark new ideas, give you confidence and solidify your concept.

Step 2 – Consolidate. Capture your thoughts in writing as you speak them. Dictation software like Dragon NaturallySpeaking lets you talk first and edit later.

Step 3– Commit. Transfer your dictation to Word and edit the content into its final format. This often means moving the last thing you've said to the beginning, so that the rest of your writing supports your main claim or idea.

Tip #7 **Substantiate your claims.**

How persuasive an argument is depends on how well it is evidenced. That's all a proposal is, really – an argument that you make in favour of the customer buying from you.

Unsubstantiated claims are a problem in almost all unsuccessful proposals. Examples include 'We have extensive experience,' "We are uniquely qualified," or "We are a renowned leader in..."

Also known as a motherhood statement, an unsubstantiated claim is any claim that is not immediately backed up with facts. These facts need to be relevant to the prospect, and to the decision you are asking them to make.

Prospects see unsubstantiated claims as wishful thinking; something you hope is true, but actually isn't. Many proposals are riddled with them.

Unsubstantiated claims often crop up in a proposal not because they aren't true, but because of the writer's desire to summarise. This is one time when less definitely isn't more.

Any time you make a claim, immediately back it up with facts. Challenge every claim you make.

- **Why are we the leaders (or the most experienced, or the most reliable product)?**
- **How does this benefit our customers?**

One sure way to know if you have an unsubstantiated claim on your hands is to ask whether the statement you're making answers a question for the customer, or just raises one.



Tip #8 Sound like you actually want the business.

Here's an interesting exercise. Grab a proposal you wrote a while ago - long enough that you don't remember it too well - and read parts of it out aloud. Does it sound approachable, or abrupt? Believable or bland? Confident or cowering? Decisive or desperate?

Based on the way some proposals come across to the reader, you could be forgiven for thinking that the bidder doesn't actually want the business.

Long, impenetrable technical explanations that go on, and on, and on. Vast wastelands of text without a graphic in sight. Empty claims with no evidence to support them.

Proposals are all about influencing the prospect's thinking to your point of view. Provided you have your offer right, the way you deliver that offer will determine how appealing it is.

The tone of your writing is what keeps the reader interested or sends them to sleep. Offends them, or intrigues them. Makes them decide that you are the person they want to do business with – or prejudices them against you.

In fact, tone of voice is just as important in a written proposal as it is in a face to face meeting. After all, it's your personality on the page. One of the simplest ways to help your proposal get a positive reception is to use positive language. For example, instead of saying:

We would be able to give approved staff limited access to the back end of the XXX system and could provide training in how to use the system.

...you can say:

We ~~would be able to~~ will give approved staff limited password-protected access to the back end of the XXX system and ~~could~~ will also provide 10 hours of training in how to use the system.

It's amazing the difference in perception that comes from using more assertive language. This gives the impression that you are confident in being awarded the project and that you are keen to win.

That's because the words 'could', 'would' and 'should' immediately invite the reader to treat the subject as a suggestion or a possibility, but not a fact.

Consider 'our program could increase your sales by 30%' vs. 'our program will increase your sales by 30%.' Which has you signing on the dotted line today?

Tip #9: Create a sense of urgency and make it easy for the customer to say "yes".

Once a customer has read your proposal, they should want to say "yes" straight away. However, they will put the brakes on when a proposal just isn't clear enough, or you haven't included enough information for them to make a decision.

People buy for two basic reasons – to solve problems, or to realise a benefit.

Identify which one you're selling, and reference it in a way that creates a sense of urgency and a desire to buy quickly.

- Describe the benefits they may miss by failing to act
- Quantify lost opportunity in dollar terms
- Put a time limit on your offer
- Offer an incentive to strike a deal by a certain time

“ Don’t end up engaged in a lengthy game of follow-up that erodes the chances of a decision in your favour. ”

Finally, make sure you tell the customer exactly what they need to do to buy from you.

My own proposals contain a Project Authorisation form, which the client simply signs, dates and returns to me. This acts as a purchase order and confirms our legal agreement to work on the project. Best of all, it’s quick and simple – it can be signed, sealed and delivered on the spot.

Tip #10: How to get your tender response past the gatekeeper.

Back in the ‘good old days’ all we had to do to clinch a sale was make it past the prospect’s secretary and into their office to dazzle them with our pitch and do the deal on a handshake. (Or so some veteran salespeople would still have us believe!).

These days, the gatekeeper is no longer the prospect’s PA; it’s the procurement people.

A recent RogenSi Pitch Survey, which surveyed more than 3,000 people involved in bidding for multi-million dollar accounts, noted the increasing influence of procurement on pitches. Challenges reported by survey respondents included lack of access to decision makers; less time to pitch; more detail required in written submissions; and more complexity in contracts. The survey concluded that *‘the challenge for bidders now lies in being concise, persuasive and creative within a tight framework which, if not adhered to, can result in expulsion from the contest.’*

And things haven’t gotten any easier since then - in fact they are getting much harder.

Bain & Co. looked at nine years of income statements from 200 large companies and found that more than half have increasing sales and marketing expenses, and aren't getting scale benefits from their growing size. According to the study, customers increasingly demand a tailored solution anchored in expertise about their industry or a specific function; expect providers to solve their business problems; measure value based on outcomes, not the lowest price; and have more competitive, disciplined bid processes that trump ‘relationships’.

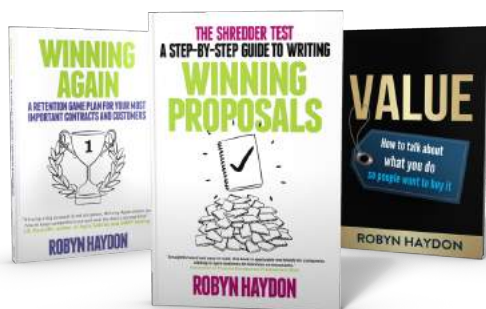
The rules and frameworks that accompany professional procurement practices like tendering do offer up opportunities, as well as challenges, to bidders.

For one thing, tender documents tell you exactly what you need to do in order to be viewed favourably – or at least, not immediately eliminated from consideration. Most are issued with Evaluation Criteria that tell you exactly what the buyer is looking for. Tender instructions are generally much clearer and easier to follow than they used to be, particularly for government tenders.

Procurement evaluators are likely to be concerned with the cost of the purchase, how well your offer meets the evaluation criteria, and whether you are prepared to comply with the way they want their suppliers to do business. Because the procurement evaluator is usually the person who has written (or at least overseen the compilation of) the tender document, be respectful of its instructions. Answer all the questions and provide sufficient information in your answers. Unless the RFP invites it, think carefully before you go to the trouble of submitting an 'alternative proposal', particularly if your complying proposal isn't strong. (And always ask permission to do so if the RFP doesn't specifically allow it.) Only include supporting material if it's relevant to your offer, and has been specifically referred to in your proposal. And put it at the back.

About the author - Robyn Haydon

Robyn Haydon is a business development advisor helping people who do great work to win more work. Her clients have won and retained business worth hundreds of millions of dollars with many of Australia's largest corporate and government buyers.



She is the author of three books including the Australian Institute of Management bestseller *The Shredder Test: a step-by-step guide to winning proposals*, *Value: how to talk about what you do so people want to buy it*, and *Winning Again: a retention game plan for your most important contracts and customers*.

Based in Melbourne, Robyn works with clients around Australia and specialises in consulting on bids that are important to an organisation's growth or stability. Her Bid strategy and Purchaser Value Topics development methodology is licensed and used by industry leaders in competitive sector who consistently win almost everything they bid for.

Robyn is also an engaging, passionate speaker. She regularly informs and inspires audiences on the current issues affecting sales, marketing and business development.

Checklist: 10 Easy Ways to Write a Better Proposal Today

1	Be clear about your task as a <i>challenger or incumbent</i>	
2	<i>Build goodwill</i> by being upfront about what you can and can't do	
3	Know - and speak to – the interests of your <i>audience</i>	
4	Know – and combat – what <i>competitors</i> will be proposing	
5	Plan the <i>structure and content</i> of your proposal	
6	<i>Compose and consolidate before committing</i> to give voice to your best ideas	
7	Substantiate your claims with <i>evidence</i>	
8	Use <i>positive</i> and confident language	
9	Create a sense of <i>urgency</i> - make it easy for the customer to say yes	
10	<i>Follow the rules</i> to get your tender response past the gatekeeper	

Let me help you win the contracts and customers
you really want to win.

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