



70 Designing a winning proposal

What is a proposal?

A proposal is your summation of exactly what your client will get for their money. You will usually only prepare a proposal after you have gained conceptual agreement to work with the client. This may follow an initial appointment during which you will have explored what the client's problems, needs and priorities are. You may also have explored the budgets they would be comfortable working within. Your proposal can be delivered in either electronic, hard copy presentation or both. Even better, you can deliver in person giving you another chance to get in front of them. Your style of delivery will very much depend on the individual client's expectations and the nature and value of the work you are proposing.

Why is it important?

It is important to make a good job of your proposal as even though your potential client has agreed conceptually, the deal will have not been finalised. Your prospective client may use the proposal to make their final decision. They may want to compare your proposal with others. Your proposal will show them how well you have listened and understood their position and requirements. It represents you, your organisation and resells the potential value of the solution before the final commitment is made to your proposal.

Your challenge

Your challenge may be that you have a lot of very time-consuming proposals to prepare. If, as a result, your proposal is late and lacking in any way, you risk giving your prospect a negative message about your reliability or ability to meet the required standards the job requires. Your proposal and everything that goes with it is a reflection of you and what your business promises. It can make or break the final outcome.

Never do a proposal on speculation. It will waste your time and you won't have enough information to make a good job of it.

The structure of a winning proposal

It is a good idea to create a basic proposal template that covers the key sections

important to your proposal. You can add in the individual customer's detail as required. This will make it a lot easier and quicker to do. There may be elements of your proposal that end up as standard. Your proposal will need to provide enough detail for your client to make their decision. It will also need to look attractive and be easy to read and interpret. Section headings that include the word 'Your' will make it appear very personal.

The key elements of a winning proposal will include

- **Introduction** – Refer to your last meeting along with an overview of what to expect in this proposal.
- **Your situation** – This is your situation summary of what you established was important at your recent meeting. Use their language, priorities and timescales.
- **Your objectives** – Bullet point exactly what they have told you.
- **Your solution** – The solution you suggest broken down so that the client can see all the key elements clearly. You may include in this section some standard descriptions of elements of your service, product and methodology you propose.
- **Value** – Make sure that the ultimate value of each element of the solution is communicated. What is in it for them is most important. They are buying results, not processes. It may be appropriate to refer to financial savings or other tangible results they will benefit.
- **Your price** – An outline of your charges and any price assumptions. If you have price guarantee this is the time to include it.
- **Your plan** – This could include suggested targets and timescales. A calendar of actions is a useful way of projecting forward, assuming the project will go ahead.
- **Your next step** – This is where you suggest the follow up you have agreed.
- **Sign off** – a positive statement about working together in the future.

Success tips

- Make sure that you fully understand your client's situation before you do your proposal.
- Don't make it too long: two or three pages is enough.
- Keep the language you use straightforward and clear.
- If you can, provide your client with a choice of options.

- If you outline your methodology keep this broad; too much detail and you give all your secrets away.
- Always follow up yourself – don't leave it longer than a week.

HOW GOOD ARE YOUR PROPOSALS – SPECIAL RESPONSE CHECKLIST

- ▶ Take time out to have a good look at the standard of your own proposals.
- ▶ How long, on average, do they take you to complete?
- ▶ Do you get them out on time?
- ▶ How many of them turn into new business? How many don't?
- ▶ How well do they reflect the image you want to portray to your customers?
- ▶ How could you use the structure provided?
- ▶ Do you make sure that your proposals appear tailor-made and personal?
- ▶ How could you improve your proposal design?

How to use this information

Create a simple system for creating winning proposals and getting them done on time.

***Think winning proposal and increase your
likelihood of getting the business***