

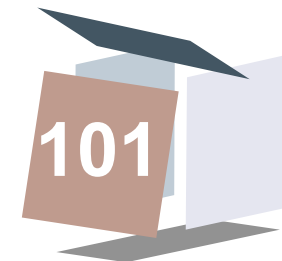


Preparing Winning Proposals

Tips and Techniques for Getting Results

GDLN Workshop, Mongolia, July 3, 2009

Business Proposals



But...What is a Proposal?

- ➔ It is primarily a sales and marketing document that positions you as having a solution to a business problem.
- ➔ It lays out a blueprint of the solutions, including the approach, implementation plan, costs, timeline...
- ➔ To achieve better results proposals **must** be:
 - ✓ Client-focused
 - ✓ Persuasive
 - ✓ Accurate and
 - ✓ Have certain key components.
- ➔ A proposal is **not** just a:
 - ✗ Work plan or statement of work
 - ✗ Price quote
 - ✗ Capability statement



"Your proposal is innovative. Unfortunately, we won't be able to use it because we've never tried something like that before."

Should the Proposal be Written At All?



- Do you have enough information to write the proposal?
 - Who is the client and what do you know about them?
 - What is the assignment?
 - Is the client different from the funder?
- Do you have the necessary capabilities?
- Who is the competition?
- What do you gain from this opportunity? Is there a longer term benefit? Enhanced professional reputation?
- Is the timing right for the proposal? Are you overcommitted? Can you deliver the quality results you promised?
- What is the cost of not submitting the proposal?

Is there a Recommended Process?



- Review the RFP or opportunity carefully
- Perform Bid or No Bid Analysis
- Create a proposal schedule
- Assemble a team
- Hold a proposal kick-off meeting
- Create a draft proposal
- Edit the proposal
- Print and Publish

What are Key Components of Successful Proposals?



Executive Summary

Provide a brief and compelling summary of the key elements of the proposal



Statement of Need

State why this project is necessary



Project Description

Nuts and bolts of how the project will be implemented

What are Key Components of Successful Proposals



Budget

Financial description of the project plus explanatory notes



Organization Info

Describe your organization, including mission, goals, skills and experience



Conclusion

Summary of proposal's main points

Project Description – Nuts & Bolts



- Objectives (describe concrete outcomes)
- Activities (describe the how, who, when and why)
- Staffing (describe the staff, including responsibilities and qualifications)
- Innovation (e.g., new initiatives, pilots and strengths)
- Evaluation Plan (how would you evaluate attainment of objectives)
- Sustainability (how will the project continue after initial funding)

Why are Some Proposals Unsuccessful?



- ✘ Failure to focus on the client's business problems and payoffs.
- ✘ Proposal is an data dump and not persuasive enough
- ✘ No clear differentiation between this vendor compared to others.
- ✘ Key points are buried – no impact, no highlighting.
- ✘ Difficult to read, too much jargon, too long and technical
- ✘ Credibility killers – misspellings, grammar, and punctuations, inconsistent formats, careless mistakes.
- ✘ The author did not follow instructions requested in the RFP

What are Key Elements of Successful Proposals



A successful proposal must:

- Be targeted carefully to appeal to a specific audience and demonstrate an understanding of their needs/interests.
- Provide solutions to specific problems raised in RFP.
- Identify tangible benefits to the client
- Include examples of previous successful solutions
- Establish credibility of who you are and why you are qualified

“Must have” for good proposals

Necessary categories of content:

- Evidence that you ***understand*** the client's business problem or need.
- A recommendation for a ***specific approach***, program, system design, or application that will solve the problem and produce positive business results.
- A ***compelling reason*** for the client to choose your recommendation over any others.
- Evidence of your ***ability to deliver*** on time and on budget.

General proposal evaluation criteria:

- ***Responsiveness:*** Are we getting what we need?
- ***Competence:*** Can they really do it?
- ***Value:*** Is this the smartest way to spend our money?
- ***Diligence:*** Does the proposal look professional, without errors?