

# Proposals

## Chapter 10

# Proposals

- **Proposals are written offers to solve problems, provide services, or sell equipment.**
- **An RFP is a request for proposal.**

# Proposals

- Type of sales presentation
- Justification or Recommendation Report
  - ☐ Persuasive partnership offers
  - ☐ Offer to solve problems
  - ☐ Important means of generating income
- Share certain Characteristics with reports
- It requires careful gathering and presenting of facts
- Proposals differ from reports in one essential way: **They are intentionally persuasive**

# Proposals

- **Proposal writers do not just provide information in orderly, useful way, they write to get a particular result.**
- **They have vested interest in the result.**
- **The purpose of proposals can be acquiring a major client, getting a new equipment etc.**
- **They can vary widely in purpose, length and format**

# Proposals

- They can range from one page to hundreds of pages
- All proposals can be categorized either internal or external, solicited or unsolicited
- Proposals must do an effective job of presenting a complete picture of what is being proposed.
- You must work hard to meet reader's needs so readers can make decision in your favour.

# Informal Proposals

- **THEY ARE SALES PRESENTATIONS**
- **Just Like Formal Proposals, Informal Proposals are written offers to:**
  - **Solve Problems**
  - **Provide Service**
  - **Sell Equipment**
- **Differ from formal proposals in length and format**
- **May be presented in short (2 to 4 page) letters.**
- **Sometimes also called Letter Proposals.**

# Kinds of Proposals

- **Formal**

- **Long (Can be consisted on 100 pages)**

- **Informal**

- **Short (Not more than 2 or 4 Pages)**

- **Pattern of formal proposal would be followed in case of more than 4 pages.**

# Formal Proposals

1. Title Page
2. Copy Of RFP
3. Letter of Transmittal
4. Abstract or Summary
5. Table of Contents
6. List of Figures

7. Introduction
8. Background Information (Problem, Purpose)
9. Proposal, Plan, Schedule
10. Staffing Requirements
11. Budget
12. Authorization Request
13. Appendix



# Informal Proposals

- 1. Introduction**
- 2. Background Information (Problem, Purpose)**
- 3. Proposal, Plan, Schedule**
- 4. Staffing Requirements**
- 5. Budget**
- 6. Authorization Request**

# Preface

- **Indicates where, in what period, and in which connection the work has been performed.**
- **Write here, if the report is aimed at a special group of readers, and thank the people that have helped.**

# Preface: Example

- This report has been written in May 2000 in a four–week project at the IT University of Copenhagen under the supervision of . . . . We thank John Doe for assistance with the program for handling TIFF–images. During the project, we developed a Java–program for analysis of microscope images of lactic acid bacteria. The program analyses a TIFF file that is produced by a digital camera that in turn is connected to a microscope. It finds the contours of all bacteria above a certain size in the image, and prints these contours to a file in REG format.

# 1. Introduction

- **You need to provide a HOOK to capture the interest of reader. Follow these points:**
  - ☐ **Promise low cost or speedy result.**
  - ☐ **Mention a remarkable resource available exclusively to customer**
  - ☐ **Identify a serious problem**
  - ☐ **Specify a key issue or benefit.**

# 1. Introduction

- **For example, in the introduction of the proposal shown in Figure 10.1 (Page 256), Allen Ward focused on what the customer was looking for. He analyzed the request of the Cambridge dentist, Dr. Diane Corbett, and decided that he was most interested in specific recommendations for improving service to her patients.**

# **1. Introduction: Example**

- Understanding the Views Of your patients is the key to meeting their needs. Approach Market Research is pleased to propose a plan to help you become even more successful by learning what patients expect of your practice, so that you can improve your services.**

# 1. Introduction: Example

- **The world is becoming advanced because of the many technological advancements in the computing science domain. However, the security concerns related networks is one of the biggest challenges. Harry Porter Security offers valuable plans for these issues.**

# 1. Introduction: Example

- **Soft skills play a vital role in the life of a professional as an individual has to present many plans to the clients, persuade the customers to buy your product etc. By keeping this important factor in mind, Training Monsters offers the training & development sessions for professionals.**



## **2. Background, Problem and Purpose**

- Identify the problem.**
- Discuss the goal & purpose of proposal.**
- Convince the reader in both solicited & unsolicited proposal.**
- As RFP (Request for Proposal) , explain with the sub headings.**

## 2. Example :

We know that you have been incorporating a total quality management system in your practice. **Although you have every reason to believe your patients are pleased with your services, you may want to give them an opportunity to discuss what they like and possibly don't like about your office.** You would also like to compare your "preferred" and "standard" patients. (**For Dentist Proposal**)

## 2. Example :

21<sup>st</sup> century is remarkable as various innovations has been introduced. **One of the most significant innovations is the internet. Nevertheless, this facility of browsing the data online has raised the severe & serious issue of cyber-crimes. That's why our company has taken the responsibility to facilitate the customers with the solution to this problem. (Network Security)**

## **2. Example :**

**Training Monsters believe that a professional becomes more valuable when he knows how to deal nicely in a professional environment. Therefore, we started this company back in 2017 to train the professionals according to the need of the organization.**

# **3. Proposal, Plan, & Schedule**

- **Discuss plan to solve problem. Follow these points:**
  - ☐ **Provide specific facts to solve problems.**
  - ☐ **Specify how project will be managed.**
  - ☐ **Specify audit mechanisms in place for the project.**
  - ☐ **Specify a schedule of activities of events.**
  - ☐ **Sell your method, product, and deliverables.**

# 3. Example

- On the basis of Our experience in conducting many local and national customer satisfaction surveys, Approach proposes the following plan:
- Survey.
- We Will develop a short but thorough questionnaire probing the data you desire. Although the survey instrument will include both open-ended and closed questions, it will concentrate on the latter. Closed questions enable respondents to answer easily; they also facilitate systematic data analysis. The questionnaire will gauge patients' views of courtesy, professionalism, accuracy of billing, friendliness, and waiting time. After you approve it, the questionnaire Will be sent to a carefully selected sample of 300 patients whom you have separated into groupings Of "preferred" and "standard. "

# 3. Example

- **Analysis.**
- Survey data will be analyzed by demographic segments, such as patient type, age, and gender. Using state-of-the art statistical tools, our team Of seasoned experts will study (a) satisfaction levels, (b) the reasons for satisfaction Or dissatisfaction, and (c) the responses Of your "preferred" compared to "standard" patients. Moreover, our team will give you specific suggestions for making patient visits more pleasant.

# 3. Example

- **Report.**
- You will receive a final report with the key findings clearly spelled out, Dr. Corbett. Our expert staff Will draw conclusions based on the results. The report will include tables summarizing all responses, divided into preferred and standard clients.



# 3. Example

☐ **Schedule.** With your approval, the following schedule has been arranged for your patient satisfaction survey:

**Questionnaire development and mailing: August 1—6**

**Deadline for returning questionnaire: August 24**

**Data tabulation and processing: August 24-26**

**Completion of final report: September 1**

## 4. Staffing

- Build credibility by describing outstanding staff and facilities.
- Describe expertise of staff.
- List size & qualification of staff.
  - ❑ Keep information generic in case staff might be changed after proposal submission.
- List other resources available such as computer facilities.

## 4. Staffing

- Approach is a nationally recognized, experienced research consulting firm specializing in survey investigation. I have assigned our customer satisfaction survey to Dr. Scott Wu, our director of research. Dr. Wu was trained at Boston University and has successfully supervised our research program for the past nine years. Before joining Approach, he was a marketing analyst with T-Mobile.

## **4. Staffing**

**Assisting Dr. Wu Will be a team headed by Karen Ploeger, our Vice president for operations.**

**Ms. Ploeger earned a BS in computer science and an MA degree in marketing from the University Of Karachi.**

**She supervises our computer-aided telephone interviewing (CAT) system and manages our 30-person professional interviewing staff.**

## **5. Budget**

- **Must be described as proposals are legal contracts.**
- **List total cost or itemized cost of the project.**

	Estimated Hours	Rate	Total
Professional and administrative time			
Questionnaire development	03	150\$ / hr	450\$
Questionnaire mailing	04	40\$/hr	160\$
Data processing and tabulation	02	40\$/hr	80\$
Analysis of findings	15	150\$/hr	2250\$
Preparation Of final report	05	150/hr	750\$
Mailing costs: 300 copies Of questionnaire			120\$
Postage and envelopes			270\$
Total Cost			\$4480

## **6. Authorization**

- **At the end, include the request for the Authorization.**
- **Remind reader of key benefit or motivate for action.**
- **Set a deadline date for the invalidation (cancellation) of the proposal.**

## **6. Authorization**

- We are convinced, Dr. Corbett. that our professionally designed and administered patient satisfaction survey will enhance your practice. Approach Market Research can have specific results for you by September 1 if you sign the enclosed duplicate copy Of this letter and return it to us With a retainer Of \$2,300 so that we may begin developing your survey immediately. The rates in this offer are in effect only until October 1.**