



Proposals and Reports

EAC594

Agenda

- Business Proposal
- Types of Proposals
- Structure and Organization
- Key Elements of Business Proposal

Business Proposals

Understand the importance
and purpose of **proposals**



Proposals



- Proposals can mean life or death for an organization.
- Proposals are fundamentally sales documents.
- A powerful proposal doesn't just answer questions or list specifications;
it tells a story.

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Writing Informal Proposals



- Proposals are written offers **to solve problems, provide services, or sell equipment**
- Proposals are written requests for action.

Source: <https://www.vectorstock.com/>

Proposals

Types and Kinds

- 1. Unsolicited**
- 2. Solicited**
- 3. Internal**
- 4. External**

Proposals

Types and Kinds

1. Unsolicited (marketing)

- Identify an existing problem.
- Present and describe problem in detail.
- Ex. Financial losses, regulatory issues

Proposals

Types and Kinds

2. Solicited (respond to RFPs)

- show that you fully understand the problem and its ramifications
- Repeat the language of the proposal

3. Internal proposals

- Purpose is to request decisions from senior executive
- Built around a great idea or solution
- *Examples:* budget proposals, project proposals and staffing proposals

Proposals

Types and Kinds

4. **External proposals**

- Requesting action from parties outside of the company
- *Examples* include sales proposals, grant proposals, partnership proposals and investment proposals

Preparing Proposals

1 Prewriting

Analyze: The purpose is to persuade the reader to accept this proposal.

Anticipate: The reader must be convinced that this survey project is worth its hefty price.

Adapt: Because the reader will be resistant at first, use a persuasive approach that emphasizes benefits.

2 Writing

Research: Collect data about the reader's practice and other surveys of patient satisfaction.

Organize: Identify four specific purposes (benefits) of this proposal. Specify the survey plan. Promote the staff, itemize the budget, and ask for approval.

Compose: Prepare for revision by composing at a word processor.

3 Revising

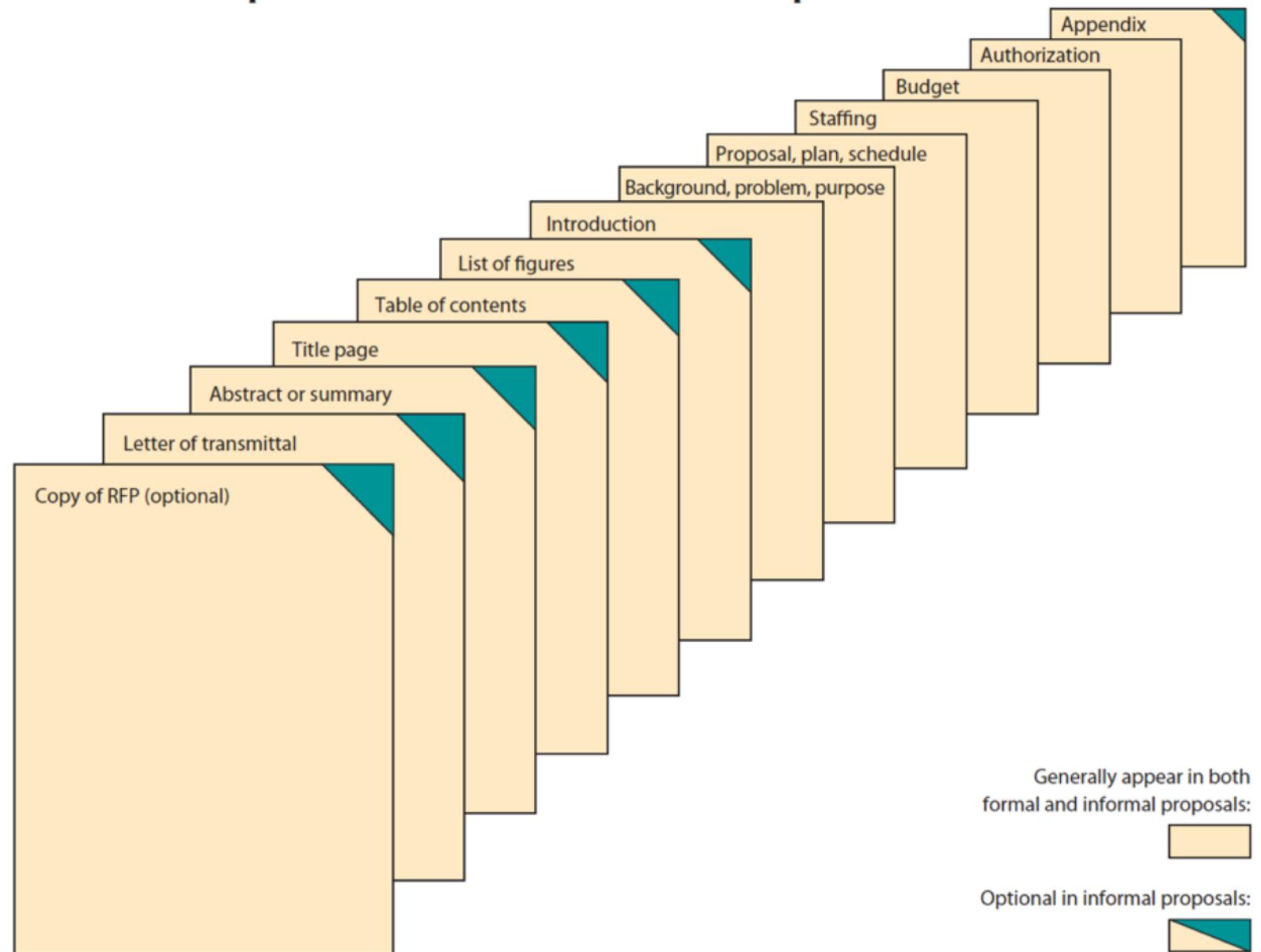
Revise: Revise to emphasize benefits. Improve readability with functional headings and lists. Remove jargon and wordiness.

Proofread: Check spelling of client's name. Verify dates and calculation of budget figures. Recheck all punctuation.

Evaluate: Is this proposal convincing enough to sell the client?

Components of Formal and Informal Proposals

FIGURE 13.1 Components of Formal and Informal Proposals



Six Main Components of Formal and Informal Proposals

1. Introduction
2. Background, problem, purpose
3. Proposal, plan, schedule
4. Staffing
5. Budget
6. Authorization



Source: <https://www.vectorstock.com/>

Developing Informal Proposals

1. Introduction

- **Purpose:** explain why the proposal is being written.
- Develop a persuasive “hook” such as the following:
 - Extraordinary results with details to be revealed shortly.
 - Promise low costs or speedy results
 - Mention remarkable resources
 - Serious problem (a worry item) and promise a solution, to be explained later.
 - Key issue or benefit

Developing Informal Proposals

2. Background, Problem, and Purpose

- Identify the problem and your goals.
- **Unsolicited proposal** - convince the reader that a problem exists.
 - present the problem in detail,
 - discuss such factors as monetary losses, failure to comply with government regulations, or loss of customers.

Developing Informal Proposals

2. Background, Problem, and Purpose

- Identify the problem and your goals.
- **Solicited proposal** - aim is to persuade the reader that you understand the problem completely.
 - if you are responding to an RFP (Request for Proposal) repeating its language.
 - For example, if the RFP asks for the design of a maintenance program for wireless communication equipment , you would use the same language in explaining the purpose of your proposal.

Developing Informal Proposals

3. Proposal, Plan, and Schedule

- Present your plan for solving the problem.
 - Describe how the project will be completed without giving away a lot of detail
- Describe implementation and evaluation.
- Outline a schedule of activities with a timetable.



Source: <https://www.vectorstock.com/>

Developing Informal Proposals

4. Staffing (Personnel)

- Explain the specific credentials and expertise of the key personnel for the project.
- Show how your support staff and resources are superior.
- Give clients exactly what they requested regarding staff, number of participants, and details.



Source: <https://www.vectorstock.com/>

Developing Informal Proposals

5. Budget

- Itemize costs carefully
 - **Proposals are contracts**
 - Allow for contingencies within the proposal. Protect yourself from rising or unexpected costs
- Present a deadline for the bid figures.



Source: <https://www.vectorstock.com/>

Developing Informal Proposals

6. Authorization

- Request client approval
- Make it easy for them to authorize
 - Ex. Please sign and send scan copy of the proposal along with an email confirming your approval.



Source: <https://www.vectorstock.com/>

Sample Proposal (1 of 2)

approach market research
research | PR | consulting

205 Carlton Place | Watertown, MA 02478
phone 617.900.2005 | fax 617.900.2020
e-mail: info@approach.com

June 2, 2012

Diane Corbett, DDS
1600 Beacon Street, Suite 105
Boston, MA 02215

Dear Dr. Corbett:

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.

Background and Goals

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. Specifically, your purposes are to survey your patients to (a) determine the level of their satisfaction with you and your staff, (b) elicit their suggestions for improvement, (c) learn more about how they discovered you, and (d) compare your "preferred" and "standard" patients.

Proposed Plan

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."

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.

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.

Grabs attention with "hook" that focuses on key benefit

Announces heart of proposal

Divides total plan into logical segments for easy reading

Uses opening paragraph in place of introduction

Identifies four purposes of survey

Describes procedure for solving problem or achieving goals

Sample Proposal (2 of 2)

Includes second-page heading

Dr. Diane Corbett Page 2 June 2, 2012

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

Staffing

Approach is a nationally recognized, experienced research consulting firm specializing in survey investigation. I have assigned your 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.

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

Budget

	Estimated Hours	Rate	Total
Professional and administrative time			
Questionnaire development	3	\$150/hr.	\$ 450
Questionnaire mailing	4	40/hr.	160
Data processing and tabulation	12	40/hr	480
Analysis of findings	15	150/hr.	2,250
Preparation of final report	5	150/hr.	750
Mailing costs			
300 copies of questionnaire			120
Postage and envelopes			270
Total costs			\$4,480

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.

Sincerely,

Allen Ward
Allen Ward, President

AEW:mem
Enclosure

Uses past-tense verbs to show that work has already started on the project

Promotes credentials and expertise of key people

Builds credibility by describing outstanding staff and facilities

Itemizes costs carefully because a proposal is a contract offer

Closes by repeating key qualifications and main benefits

Makes response easy

Provides deadline

Developing Proposals – Key Elements

- Professionalism
- Appeal



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Developing Proposals – Key Elements

Professionalism

- No errors in spelling or grammar
- All information should be concise accurate, and clearly referenced
- Easy to find and clearly relevant
- Hard copy form - printed on a letterhead
- Electronic form – appropriate file format (MS Word or PDF)



Source:
<https://www.vectorstock.com/>

Developing Proposals – Key Elements

Appeal

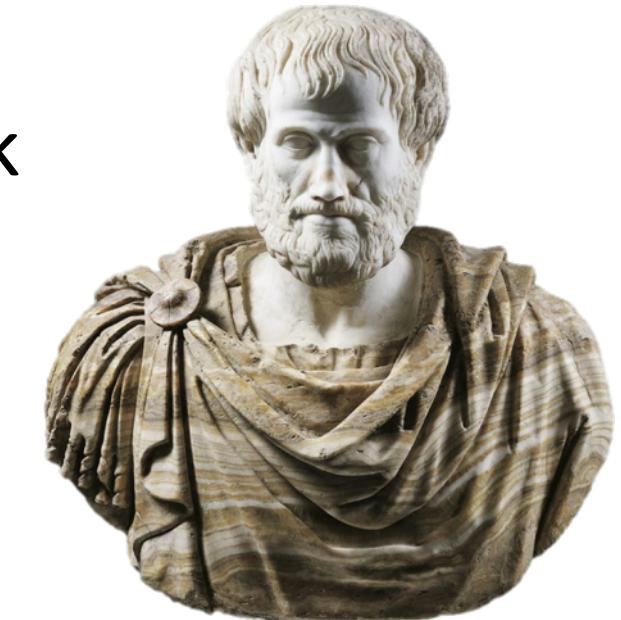
- **Rhetoric** refers to strategies used to persuade a specific audience.
- **Logos** (reason/logic)
- **Ethos** (credibility)
- **Pathos** (emotion)
- All three elements are integral parts of your business proposal



Source:
<https://www.vectorstock.com/>

Aristotle - The Art of Rhetoric

- Greek philosopher and scientist
- The Art of Rhetoric (4th century BC): Greek treatise on the art of persuasion
- Aristotle saw rhetoric as a neutral means to do the greatest good or the greatest harm.





What is Rhetoric?

Rhetoric is the art of persuasion.

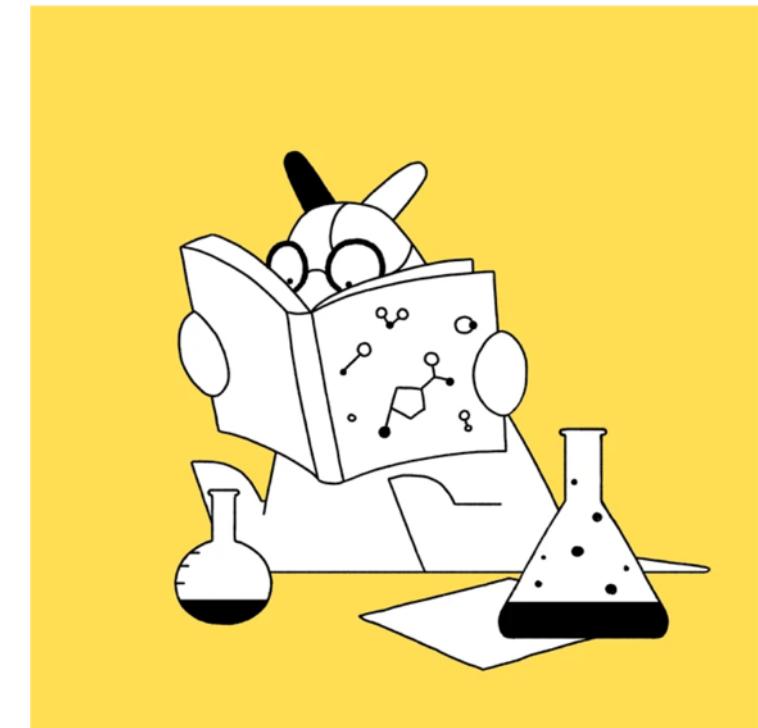
Modern view:

- Rhetoric is the study of effective communication.
- It includes an awareness of the language choices we make when we communicate for any reason.

Appeals

Logical Appeal (Logos):

- Facts
- Examples (various types)
- Statistics
- Experiments
- Case studies
- Analogies and logical reasoning

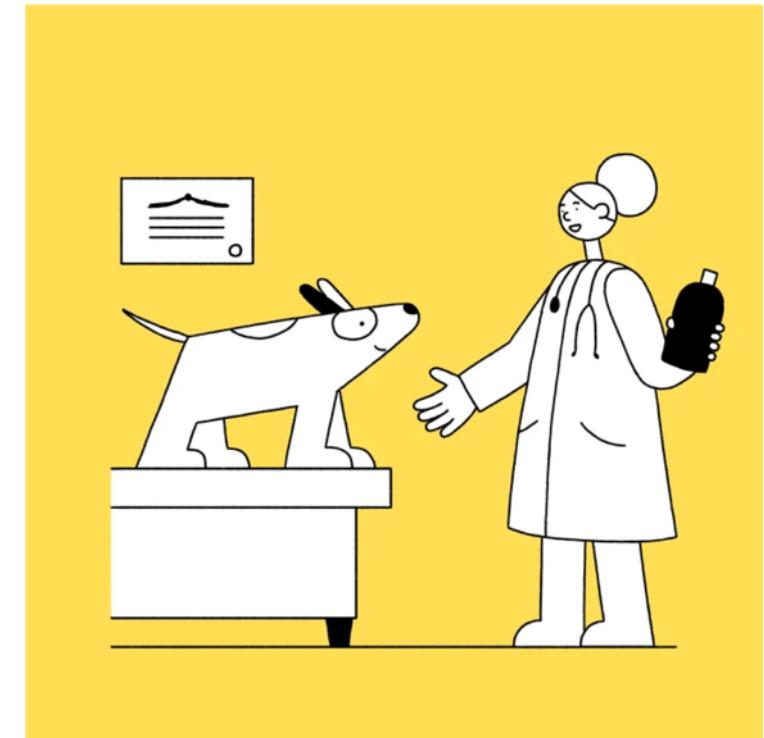


Source: <https://boords.com/ethos-pathos-logos>

Appeals

Ethical Appeal (Ethos):

- Citation of experts' opinion
- Examples illustrating deep knowledge of the issue
- Answering opposition



Source: <https://boords.com/ethos-pathos-logos>

Appeals

Emotional Appeal (Pathos):

- Personal anecdotes
- Narratives
- Impact studies
- Testimony of those having first-hand knowledge of/experience with the issue



Source: <https://boords.com/ethos-pathos-logos>

Developing Informal Proposals – My Take

Beyond the formal proposal:

- References
- Interviews
- Demonstrations

The edge:

- **Money:** Cost is king
- **Law:** Begin with the assurance of compliance
- **Time:** Create a Work Breakdown or a Gantt Chart
- **Human factor:** Pre-existing relationships



Source:
<https://www.vectorstock.com/>

End