



Welcome

Writing Clear Proposals

Jay Dixit - New York Writers' Intensive

Storytelling classes | Writing Workshops | Coaching

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Agenda



Introductions



Goals and learning objectives

Goal 1

APPLY ANALYTICAL THINKING TO THE PROPOSAL PLANNING PROCESS

- Learn to use and apply the Question Method™, a technique for identifying the structure and major points of a document by asking and answering a series of analytical questions
- Use the Question Method™ to articulate the purpose of the document
- Use the Question Method™ to define the key points for each section
- Use the Question Method™ to formulate a logical structure

Goal 2

WRITE WITH THE READER IN MIND

- Write with clarity and precision
- Trim for concision

LEARNING METHODS

- Lecture
- Modelling
- Practice

Criteria for Success

WHAT MAKES A PROPOSAL GOOD?

1. **Rigorous.** You've asked and answered the right questions.
2. **Organized.** Structured so as to make it easy to follow the logic behind it.
3. **Clear.** Written in a direct way such that it's easy for the reviewer to understand.
4. **Concise.** Doesn't ramble or repeat. Gets to the point quickly. No extraneous information.
5. **Data-driven.** Provides data demonstrating why the plan is expected to succeed.

Organized.

Structured so as to make it easy to follow the logic behind it.

Thinking about structure [\(link\)](#)

PRACTICE: What's the structure? ([link](#))

Structure

ORIGINAL STRUCTURE

Executive Summary

- Our Immediate Recommendations
- Future Recommendation

About the Relocation Customer

- Relocating customers are a large segment of good contacts with different needs
- Relocating Home Buyers are Under-Represented at Redfin

Contact Conversion and Improved Customer Experience

- Improve Identification of Relocates in Agent Tools
- Create 3rd Party Referral Fee Policy

Adjust Agent Events, Roles, and Education

- Deal Writing Agents
- Support Agents and Relocation Coordinators

Improve Website UX for Relocates

- Reduce Friction for Customers to Contact Agents in Another Market
- Relocation Pages and Tools

Contact Generation

- Partner with MOVE Guides
- Targeted Consumer Marketing
- Partnering with corporate talent teams to reach employees

PRACTICE: Interpreting the structure

- **What's the objective of this document and the main point it's making?**
- **What's the logic progression of the document?**
 - **What's the main point of each section?**

THE BENEFITS OF AN EXPLICIT STRUCTURE

Executive Summary

- Our Immediate Recommendations
- Future Recommendation

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Critique

ORIGINAL STRUCTURE

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Revised structure [\(link\)](#)

REVISED STRUCTURE

Executive Summary

- Immediate recommendations
- A future recommendation
- Financial projections

Relocating Customers are a Significant Opportunity for Redfin

- Relocating customers are a large segment of good contacts
- Relocating buyers and sellers are good customers for Redfin
- Redfin fails to capture leads among relocating home buyers
- Redfin fails to convert relocating customers
- Redfin is uniquely positioned to win relocating customers

Objective 1: Increase Conversion Rate of Relocating Buyers and Sellers

- Improve identification of relocating customers in Agent Tools
- Implement a standard referral fee for third-party referrals
- Begin offering “Neighborhood Consultations”
- Add a “Relocation Coordinator” role
- Add relocation content and features to the Redfin website
 - Enable relocating customers to contact agents in their destination city
 - Add website content for relocating customers

Objective 2: Generate Leads Among Relocating Buyers and Sellers

- Partner with MOVE Guides
- Begin targeted consumer marketing of relocating customers
- Partner with corporate talent recruiters
- Begin a Redfin Business Ambassador program

PRACTICE: Interpreting the structure

- **What's the objective of this document and the main point it's making?**
- **What's the logic progression of the document?**
- **What's the main point of each section?**

Debrief

THE BENEFITS OF AN EXPLICIT STRUCTURE

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- A future recommendation
- Financial projections

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How do bad documents happen?

How **not** to write a document

- The Brain Dump
- The Curse of Knowledge
 - Trying to strategize in your head
 - Facts without meaning

Mistake 1: The Brain Dump

Mistake 2: The Curse of Knowledge

Mistake 3: Trying to strategize in your head

Mistake 4: Facts without meaning

“I think deductively. I’m used to doing
fact, fact, fact, and **then** conclusion.”

—John

FACTS WITHOUT MEANING

- We all are—that’s why we must **separate** the **thinking file** from the **final document**
- Writing with the reader in mind requires **inverting that order** for the reader
 - **Withholding** the meaning until the **end** makes readers **confused** and **bored**
 - Instead we **orient the reader** by **stating the significance** at the **beginning**
 - **Until** the reader **knows** the meaning, **facts and figures are meaningless**
 - **Stating the meaning** at the outset **creates context** for the facts that follow



Break

10:30 – 10:45 am

Outlining isn't enough

How do you know what to put in an outline?

Thinking is the first step to clear writing

- The main problem with business writing is a lack of clarity
- Writing is thinking on paper
 - Clear thinking → clear writing

How to think analytically

How to think analytically

Analytical thinking is the process of asking and answering questions.

How to write clearly

asking good questions → good answers → clear thinking → clear writing



A technique for thinking clearly

FIRST STEP: Create two separate documents

1. Your **thinking** file
2. The (first draft of) the **final document** you'll present to the reader

Jay Dixit's Process for Writing Clearly

1. Think
2. Outline
3. Write
4. Rewrite (for clarity)
5. Trim (for concision)

Jay Dixit's Process for Writing Clearly

1. Think strategically and analytically using the Question Method™
 - Ask the right questions
 - Answer those questions
2. Outline
3. Write
4. Rewrite (for clarity)
5. Trim (for concision)

How do you know what questions to ask?

JAY DIXIT'S QUESTION METHOD™

JAY DIXIT'S QUESTION METHOD™

1. Start by writing: “What question is this document trying to answer?”
2. Whenever you know the answer to a question, write down the answer
3. If you don't know the answer, think what other question you'd need to answer to get there. write down that new question
4. As new questions arise, write those down too
5. Go to #2
6. Continue asking and answering questions until all questions are answered and you can't think of any more relevant questions

Demo: Jay Dixit's Question Method™

Demonstration

What question is this document trying to answer?

- The question this document is trying to answer is: Should we reduce our agents' commission to 1% nationwide?

OK, so, should we?

- To answer that question, we need to ask: Is that plan likely to succeed?

So, is it? likely to succeed?

- To answer that question, we need to ask: Succeed at what? What's the objective of the plan?

OK, so what is the objective?

- The objective is to increase our market share throughout the country.

OK, so will the plan succeed in increasing our market share?

- Yes, we think it might.

Why do we think it might? What data do we have?

- We think this approach might increase our market share because our consumer research is telling us that sellers are price conscious and want to save as much money as possible on the sale. So, we have a hypothesis that maybe if we cut our commission to 1%, which is 33% to 50% off the standard commission that other agents charge, we might increase our market share.

OK, and have we tested this hypothesis?

- Yes, we tested it for 2 years in a few smaller markets.

OK, and what did those tests find?

- That test found that we did indeed grow market share faster in the markets where we reduced our commissions.

OK, and do we have any data suggesting that we shouldn't reduce our commissions or that it wouldn't work?

- No, the experiment we ran pointed strongly in favor of reducing our commissions.

OK, and are there any downsides to reducing our commissions?

- etc

Demo: Jay Dixit's Question Method™

What's the objective of this document?

- To lay out a strategy for doing a better job of capturing value from relocating customers.

Demo: Jay Dixit's Question Method™

Why do we want to do a better job?

- we're not doing a good job of capturing them now
- because they're a huge opportunity

Demo: Jay Dixit's Question Method™

How are we not doing a good job of capturing them now?

- we're not capturing new leads
- we're not converting

Demo: Jay Dixit's Question Method™

Why do we think they're a huge opportunity?

- relocating customers are a large segment of good contacts
- relocating customers are good customers for us
- we're uniquely positioned to win relocating customers

Demo: Jay Dixit's Question Method™

Well OK so what could we do better?

- generating leads
- converting existing leads

Demo: Jay Dixit's Question Method™

What's our strategy for doing better in those two areas?

- to increase conversion rates:
 - Improve identification of relocating customers in Agent Tools
 - Implement a standard referral fee for third-party referrals
 - Begin offering “neighborhood consultations”
 - Add a “Relocation Coordinator” role
 - Add relocation content and features to the Redfin website

Demo: Jay Dixit's Question Method™

What's our strategy for doing better in those two areas?

- for generating leads
 - Partner with MOVE Guides
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PRACTICE: The Question Method™

- **Run the Question Method™ on the document you brought**

QUESTIONS CHECKLIST: Have you answered the critical questions?

- **What are some critical questions?**

QUESTIONS CHECKLIST: For a memo

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QUESTIONS CHECKLIST: For a memo

- **How will we win?**
- **What's the plan?**

QUESTIONS CHECKLIST: For an update

- **What are some critical questions?**

QUESTIONS CHECKLIST: For an update

- **What's our current status?**

QUESTIONS CHECKLIST: Have you answered the critical questions?

- What's my goal in this document?
- What am I trying to say?
 - Where are we today, where do we want to be in the future?
 - How do I propose that we get there?
 - What's the problem I'm trying to solve?
 - What solution am I proposing?
 - Why do I think this will work?
 - What evidence do I have to back up my assertions?
 - How will we keep track of progress, assess performance?

QUESTIONS CHECKLIST

- Is this big enough to matter?
 - Who benefits? The team? The customer?
 - How does this improve the customer experience?
 - What is this displacing?
 - What are potential unintended consequences?



Lunch

11:45 AM–12:45 PM

STRUCTURING A DOCUMENT

- **Learning objective:** Use the Question Method™ to formulate a logical structure

CREATING A HIERARCHICAL DOCUMENT STRUCTURE

- Take the questions from the Question Method™
- Put them in a logical order
- Identify relevant sub-questions

THE QUESTION METHOD™

What's the objective of this document?

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PRACTICE: Creating a hierarchical document structure

HEADING WORKSHOP

HOW TO TITLE YOUR HEADINGS

- use explicit headings to make it clear what the point of the section is
- verbs are clearer and more forceful than nouns
- longer, more informative headings are clearer
- headings of the same level should be grammatically parallel
 - questions for the board should be phrased as questions
 - recommendations should be phrased as recommendations

DEMO: Original Heading Title

Adjust Agent Events, Roles, and Education

Deal Writing Agents: Agents report that relocatees tour homes inefficiently at the start of their search because they have not yet narrowed their neighborhood focus. We recommend creating a new event called a “Neighborhood Consultation” that would delight customers, reduce customer search time and increase tour-to-close conversion. We think the event will, at minimum increase conversion from an estimated 30% to 32%, generating ~200 more closes per year and increasing revenue by \$2M.

Begin offering “Neighborhood Consultations”

One thing that makes relocating customers different is that they don’t know what neighborhood to move to in their new city. Indeed, agents report that relocatees tour homes inefficiently at the start of their search because they have not yet narrowed their neighborhood focus.

We recommend creating a new event called a “Neighborhood Consultation,” which would delight customers, reduce customer search time, and increase tour-to-close conversion. We think the event will, at minimum increase conversion from an estimated 30% to 32%, generating ~200 more closes per year and increasing revenue by \$2M.

DEMO: Original Heading Title

Adjust Agent Events, Roles, and Education

Support Agents and Relocation Coordinators Support Agents rarely book both a tour and listing consult for the same customer. This is an incentive-related problem that applies broadly, but it is a particularly acute issue with relocating customers. This is both because relocatees are unfamiliar with their destination city and because Support Agents don't know DWAs or booking protocols outside their market.

We recommend creating a HUB-based Relocation Coordinator (RC) role. The RC will be an expert in booking all event types for any Redfin market and will be familiar with our relocation-specific resources, such as Opportunity Score and neighborhood pages. Support Agents and Tour Coordinators will route relocation calls to the RC who could set up the appropriate events in both regions. At first, this might be a part time position for 3-4 Support Agents. Alternatively, if the proposed Redfin VIP program is implemented, the role could be handled by a VIP Agent. The VIP program has also specified an algorithm-based tool which would allow a VIP Agent or RC to find and schedule the right agent in any market. We strongly support the development of this tool.

DEMO: Revised Heading Title

Add a “Relocation Coordinator” role

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OPENING AND FRAMING

- **Goal 2: Writing with the reader in mind**

How do I know what to say **within each section?**

Using the Question Method™ within each section

Learning objective: Use the Question Method™ to define the key points within each section

All documents are FAQs

- Every section must be asking and answering a question

Using the Question Method™ within each section

Your stating point is always the same:

What question am I trying to answer in this section?

PRACTICE: What am I saying in each of these paragraphs?



Debrief

EXPLICITNESS: Tell the reader why they're reading what they're reading

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- Never make the reader read something without telling them why it's important.

EXPLICITNESS: Tell the reader why they're reading what they're reading

2016 Performance

Through July 2016 we have spent \$4.5M on digital media, up 134% YoY and +24% compared to our original 2016 budget. We project the cohort from January through July will drive \$17.1M in revenue, up +162% YoY over the same period last year. We also expect a 5.2% contribution margin. By comparison, our contribution margin was break-even in 2015.

EXPLICITNESS: Tell the reader why they're reading what they're reading

Example: [Redfin Relocation](#)

DEMO: HOW TO TITLE YOUR HEADINGS

Begin offering “Neighborhood Consultations”

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We recommend creating a new event called a “Neighborhood Consultation,” which would delight customers, reduce customer search time, and increase tour-to-close conversion. We think the event will, at minimum increase conversion from an estimated 30% to 32%, generating ~200 more closes per year and increasing revenue by \$2M.

PARAGRAPHS – What does it mean to have the reader in mind?

- **Orient the reader within a sentence or paragraph**
 - **Curse of knowledge**
 - **Need to know basis**

EXPLICITNESS AND CLARITY

- **Learning objective:** Write with explicitness and clarity

TRANSFERABLE STRATEGIES: USE PRECISE WORDS

Pause and ask yourself:

- "What am I really trying to say?"
- "How would I explain this to a friend?"

DEMO: USE PRECISE WORDS

Reduce Friction for Customers to Contact Agents in Another Market

- We don't cleanly service a client who has worked with Redfin in one market and wants to buy in another. This customer is surprisingly common.

PRACTICE: “What am I trying to say?”

Reduce Friction for Customers to Contact Agents in Another Market

- We don't cleanly service a client who has worked with Redfin in one market and wants to buy in another. This customer is surprisingly common.

DEBRIEF: “What am I trying to say?”

- Currently, we don't provide an easy way for relocating clients who have already worked with Redfin to start working with us again in their new city. Yet these customers are surprisingly common.

DEMO: AVOID NOMINALIZATIONS

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The rise of the planet's temperature is a result of greenhouse gases.

DEMO: AVOID NOMINALIZATIONS

Greenhouse gases are causing the the planet's temperature to rise.

DEMO: AVOID NOMINALIZATIONS

Greenhouse gases are raising the planet's temperature.

DEMO: AVOID NOMINALIZATIONS

[2017 Direct Marketing: How Big Can It Get?](#)

WHAT TO LOOK FOR

- use precise words
- use active verbs rather than to be verbs
- avoid nominalizations



Break
3:00–3:15

EDITING AND TRIMMING

- **Learning objective:** Trim for concision

TRANSFERABLE STRATEGIES: Tricks for cutting

- **Learning objective:** Trim for concision

TRANSFERABLE STRATEGIES: Tricks for cutting

- mentally switch modes
- print it out and use a red pen
 - pretend it's someone else's writing

EDITING AND TRIMMING

PRACTICE: What can I delete?

Application: Action planning

Review sample proposal

CREATE AN ACTION PLAN FOR SAMPLE PROPOSAL

WORKSHOP: PUTTING IT ALL TOGETHER

- Rewrite the document you brought



Workshop

3:30–4:30

Closing



Summary of Learning



The end

Writing Clear Proposals

Jay Dixit - New York Writers' Intensive

Storytelling classes | Writing Workshops | Coaching

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