Refer to <https://www.pandadoc.com/blog/how-to-write-a-technical-proposal/>

**Technical proposal writing: Definition, formatting, characteristics, templates, and everything else you need to know**

Writing a [technical proposal](https://bizfluent.com/how-7781302-write-technical-proposal.html) entails an in-depth understanding of the proposed solution, the main pain points, and, ultimately, your audience.

In technical writing, writing the content of a proposal can be overwhelming and time-consuming, even more so if you don’t have a technical background.

However, a successful proposal can result in a new project and/or client when done well.

In 2021, more and more [marketers are turning to automatization](https://www.pandadoc.com/pandadoc-for-marketers/) for help.

Whether in construction, education, healthcare, software, and technology, or manufacturing, there is an appropriate automated option that can help achieve the best results.

## How to write a technical proposal:

1. [Prepare an executive summary, abstract, or introduction](https://www.pandadoc.com/blog/how-to-write-a-technical-proposal/#1)
2. [Put together a table of contents (TOC)](https://www.pandadoc.com/blog/how-to-write-a-technical-proposal/#2)
3. [Add technical background, opportunity, or situation](https://www.pandadoc.com/blog/how-to-write-a-technical-proposal/#3)
4. [Write technical approach, resources, and costs required](https://www.pandadoc.com/blog/how-to-write-a-technical-proposal/#4)
5. [Mention capabilities and procedure](https://www.pandadoc.com/blog/how-to-write-a-technical-proposal/#5)
6. [Anticipate benefits of project proposal](https://www.pandadoc.com/blog/how-to-write-a-technical-proposal/#6)
7. [Anticipate environmental impact of the proposed solution](https://www.pandadoc.com/blog/how-to-write-a-technical-proposal/#7)
8. [Write a conclusion](https://www.pandadoc.com/blog/how-to-write-a-technical-proposal/#8)
9. [Add nomenclature](https://www.pandadoc.com/blog/how-to-write-a-technical-proposal/#9)
10. [Add references and sources](https://www.pandadoc.com/blog/how-to-write-a-technical-proposal/#10)
11. [Mention appendices](https://www.pandadoc.com/blog/how-to-write-a-technical-proposal/#11)

## What is a technical proposal?

A technical proposal is a document that contains an introduction to the product, an explanation of how it will help address the recipient’s problem, the company’s execution plan, and technical details of the deal.

This type of proposal should be brief, and it should explain the complex product in simple terms.

## Technical proposal formatting: How to format a technical proposal?

If you don’t want to get bored and consumed with writing a technical proposal from scratch day after day, you can always turn to [PandaDoc’s technical proposal template](https://www.pandadoc.com/technical-proposal-template/), beautifully designed and accurately put together.

Our technical proposal template covers all technical proposal sections you need in a successful document of this type; in addition, we give you useful information on how to fill it out effectively.

However, if you’d rather do it on your own, here are essential elements of technical proposal formatting:

1. **Prepare your proposal’s introduction well.** Ensure it does all of the following (not necessarily in this order):  
     
   a) State that the memo contains a proposal for a specific project.  
   b) Write at least one short inspiring message to encourage the recipient to keep reading and approve the project.  
   c) Give an overview of the proposal’s content.  
     
   An introduction is required if the proposal is unsolicited, as you will need to convince the audience there is an opportunity that should be explored.
2. **Background information on the issue.**The background part often follows the introduction and outlines the necessity for the project—the problem, opportunity for improvement, and scenario.
3. While the specified audience of the proposal may be familiar with the issue, writing the background section helps demonstrate your unique perspective.
4. **Project benefits and feasibility.** Most proposals briefly explain the project’s benefits and its success rate. This is a form of pro-project argument. In an unsolicited proposal, this section is critical to “sell” the project to the audience.
5. **Proposed task description (results of the project).** Most proposals must describe the final product. Proper technical proposal formatting entails identifying the document’s audience and purpose, providing an overview, and considering length, graphics, binding, etc.
6. In some proposals, you must explain how you will complete the work. This adds to your persuasiveness and demonstrates you have done your homework. It also shows that you know the field well enough to finish the project.
7. **Schedule.**Most proposals include a section detailing the project’s completion date as well as significant milestones. If you’re working on a long-term project, the timeline will include due dates for progress reports. If you can’t give dates, give time frames for each phase of the project.
8. **Resources, costs.** Most proposals include a section on project costs, both internal and external. External projects may require you to include your hourly rates, expected hours, equipment and supply prices, and so on before calculating the final project cost.
9. Internal projects aren’t free, so you should still disclose the project costs: time spent on the project, equipment and supplies used, and assistance from others in the business.
10. **Conclusions.** The closing paragraph or portion of the proposal should remind readers of the project’s benefits. Your last section should entice them to contact you to discuss the project in detail and perhaps make one last case for why you or your firm is the best candidate for the job.

#### Bonus tip

Remember that the preceding parts are examples, not requirements. Always consider what more your audience would need to comprehend the project, its necessity, its benefits, your position in it, and your qualifications. Always ask yourself: What else do they need to approve the project and you to complete it?

## How long should a technical proposal be?

It’s a classic Goldilocks problem to create a proposal that’s just the correct length.

Your pitch should not be too short, as this will leave out important information.

It should not be excessively long, either, as this may cause your client to skim or skip sections. So, how long do you think your proposal should be?

Although proposals **of 10 to 20** pages are usual, some clients prefer short concept notes, while others rather go for extensive proposals **of 50** pages or more.

This is, however, merely a framework metric.

The ideal length is one that best satisfies the needs of your client.

## Technical proposal types

Technical proposals can be divided into two categories.

### Business proposal or sales proposal

Sales proposals, also known as business proposals, are given to possible buyers or consumers outside of the company. In terms of form and style, sales proposals rarely resemble one another.

In fact, they frequently follow very different and artistic directions, similar to successful ads.

PandaDoc offers [business proposal templates](https://www.pandadoc.com/business-plan-templates/) and [sales templates](https://www.pandadoc.com/sales-proposal-template/) that can help take your company to the next level.

### Research proposals

Research proposals can be defined as an academic plan with a clear and coherent overview of the planned study.

Professors or institutions often use research proposals to get a grant in response to a request or announcement from the government or another agency.

The research proposal is a detailed, well-thought-out strategy written by the investigator or researchers.

[PandaDoc’s research proposal template](https://www.pandadoc.com/research-proposal-template/) is a beautifully designed, accurate document that helps individuals and companies write as many technical proposals as they need – quickly and effectively.

Why not try it? All you need to do is sign up and that’s it! No credit card is required, that’s right.

## What is technical proposal writing?

Technical proposal writing is translating technical requirements into a customer-facing proposal used to pitch your solution or offerings.

Considering the situation in which your proposal occurred and depending on its nature, technical proposal writing might encompass only a small section or the whole proposal.

Also, do regard that different proposals require different methodologies and concepts.

While the main idea behind them is the same/similar (getting your point across and being approved for a project), a business proposal won’t have the same structure as a technical proposal, nor will a cover letter for a progress report follows the same proposal examples as a piece of technical proposal writing.

In putting together and implementing a request for proposal, you need to mind a few steps of its structure.

Read on for the best tips that will help you create your best technical proposal writing.

## Step 1. Prepare an executive summary, abstract, or introduction

Provide a summary of your proposal in one page or less, presenting an overview of the proposed work.

Make sure your proposal writing is carefully put together and **covers all elements and deliverables you plan to tackle:**

1. Indicate that your memo content revolves around a proposal for a specific project.
2. Develop at least one direct, to-the-point and motivating statement that will inspire the recipient to read on and consider supporting/approving the project.
3. Put together an overview of the contents of the proposal.

It is not necessary you lay things out in this order.

If you are writing a proposal on your own, make sure you use proper [proposal templates](https://www.pandadoc.com/it-sales-proposal-template/), follow the outlined workflow and formatting, and stay on point.

Here’s a good example of how you can [put together an executive summary for a website development proposal](https://www.pandadoc.com/website-development-proposal-template/).

## Step 2. Put together a table of contents (TOC)

The purpose of a table of contents or TOC is to show the readers what topics this technical proposal covers, how the topics are discussed (the subtopics), and what page numbers they can find those sections and subsections.

A well-organized table of contents provides an at-a-glance way of finding information in the proposal. In that sense, it is crucial you apply proper formatting in your TOC design structure.

Do consider the following:

1. **Levels of headings:** If your proposed project is longer, consider including more than the top two levels of headings. This keeps the TOC from becoming unwieldy and overwhelming.
2. **Indentation, spacing, and capitalization:** Make sure all levels of headings and page numbers are aligned with each other. As for capitalization, it is customary for main chapters or sections to be in all caps. Also, first-level headings apply initial caps on each main word, while lower-level sections apply initial caps on the first word only.
3. **Vertical spacing:** For increased readability of your entire proposal, format the first-level sections so they have extra space above and below.

#### Bonus tip:

In putting together your TOC, make sure all words of your table of content are the same as they are in the text. You might change some of the headings as you write and revise, so don’t forget to apply the same changes to the TOC, too.

## Step 3. Technical background, opportunity, or situation

Give background that [identifies the problem](https://courses.lumenlearning.com/technicalwriting/chapter/problem-analysis_lecture-2/); discuss what has inspired the need for the project, and provide motivation explaining why such a task would be essential or beneficial.

Reflect on the present opportunity to improve things in your proposed project while explaining the basic situation.

For example, the project management department of an IT company or a startup is looking to ensure that all employees know the basics of safety measurements in case of a fire, resulting from a new set of regulations for IT companies or due to their personal preferences.

While most of the proposal’s named audience may already be familiar with this very well, writing the background section is valuable as it demonstrates your particular view of the situation.

If this is an unsolicited proposal, a background section is almost a must.

You will have to convince the audience that this is the right time for your proposal assignment (as the opportunity exists) and that it should be addressed.

### 3.1 Justification, benefits, and feasibility of the proposed work

Provide technical justification for your technical proposal, and include any data obtained by yourself or others (if cited properly) that would support your idea and the proposed project.

Everything you lay out in this section serves as a type of argument in favor of approving the project.

If you are handling an unsolicited proposal, you will possibly need to discuss the likelihood of the project’s success. This section is where you are trying to “sell” the audience on the project.

This section is often the largest and tends to contain numerous subsections such as:

### 3.2.1 Theory

Short theoretical summary tackling the benefits of your proposed work, as well as its justification and viability.

### 3.2.2 Previous experimental results

Drawing in on previous work that would serve as an example and starting point for what you are about to propose and, ultimately, work on.

### 3.2.3 Theoretical modeling of experimental results

Submitting relevant papers, textbooks, and links that may have standing as a backup in your work.

### 3.2.4 Implications of work completed to date

Any relevant work related to your idea and project that can serve as an example that such work is possible to complete.

### 3.2.5 Identification of critical needs

An overview of tools (of any kind) you may need to complete your proposed project successfully.

The models above are only examples of the format this section usually contains but should be considered flexible.

## Step 4. Technical approach, resources, and costs required

Most proposals contain a section resembling a progress report detailing the approach to the projects, resources, objectives, and costs required.

This is true for both internal and external proposals.

The difference is that external projects, i.e., external technical proposals, may require a detailed list of costs of equipment and supplies, your hourly rates, projected hours, and so forth, and then calculate the total cost of the entire proposal.

Internal projects, although a bit more laid back, are still not free; they too require a list of the project costs: hours need for proposed work completion, equipment and supplies you will be using, potential assistance you may need from other team members in the organization, and so on.

Here is a part of the proposal that is typically included in this section:

### 4.1 Objectives

Pinpoint the specific things you plan to achieve with this project.

### 4.2 Statement of work/Work plan

The statement of work (SOW) is a document that covers and defines all components of a project’s scope of work. It is legally binding and notes the project’s activities, deliverables, and timeline.

It’s a very detailed work contract that establishes the framework for the project plan.

SOW is one of the first, and most important documents you’ll create before planning and executing a project. Writing one can be intimidating due to the quantity of detail required.

An SOW can be classified into one of three categories:

* **Detail and design:**Writing an SOW communicates to the supplier how you want the work done. Why should suppliers care about the buyer’s requirements? These project requirements can include quality acceptance criteria, payment arrangements, and material measurement. In most SOWs, the buyer is held accountable for the project’s performance.
* **Level of Time/dedication and materials/unit cost:**This is an almost unified variant that can apply to most projects. It outlines hourly service and supplies needed to execute activities. It’s used in short-term contracts.
* **Performance-Based:**Project managers favor this SOW since it focuses on the project’s purpose, resources, and deliverable quality. But it doesn’t say how the work is meant to be done. This gives a lot of freedom in achieving a goal without necessitating a precise process.

### How to write a statement of work?

Here’s a quick rundown of the steps you’ll need to **write your statement of work:**

* Make a one-paragraph introduction to your project.
* Establish the goal of your project.
* Define the scope of your project.
* To identify your project’s activities, milestones, and deliverables, create a work breakdown structure.
* Organize your tasks, milestones, and deliverables into a schedule.
* Define the project’s needs and conditions for approval.
* Define the terms and conditions of payment.

When writing the work statement, **be specific**. You want to make the terminology universally understood. Define who will do what and when it must be done.

This minimizes potential misunderstandings later in the project.

**Include visuals** such as graphs, charts, illustrations, or others; they should accompany concise SOW documents you are designing for clients to make them more digestible.

After planning and preparation, you don’t want to miss the final, critical step – **getting the job signed off.**You can’t proceed unless you have authority.

You can, but it may cost you the project’s success. As a result, confirm authority has signed off on the work statement.

If you are thinking that there are one too many steps in this process, you are right. Putting together a decent SOW takes a lot of time and energy, taking away of more important business.

But, guess what?**PandaDoc’s got your back!**

One of our many template offers is a detailed [Statement of work template](https://www.pandadoc.com/statement-of-work-template/?utm_source=google&utm_medium=cpc&utm_campaign=Google_Search_NB_Templates_WW&utm_content=Statement_of_Work_Template&utm_device=c&utm_placement=&utm_term=statement%20of%20work%20template&utm_creative=546414181805&network=g&gclid=Cj0KCQiAhf2MBhDNARIsAKXU5GT5SVvMvzA-uWlIJLy2HbFnxeyLWWFqRagt0TV5MRlzZ69Va1oBsmwaArNlEALw_wcB) you can start using right now! If you are any similar to our regular clientele, you’ll love how efficient and well-designed it is!

### 4.2.1 Project tasks

Provide a detailed list of itemized tasks (Task 1, Task 2, etc., with sub-tasks (if any), numbered Task 1.1) that need to be performed for the objectives listed above to be met.

Each task and subtask should come with a brief description.

### 4.2.2 Project calendar/schedule

Attach each task to a schedule for project completion. Include a calendar predicting the overall project completion.

If preferred, this section can contain a chart for schedule illustration.

### 4.2.3 Expected costs

Determine costs per each task and the overall project completion.

Include estimates for all labor involved as well as any supply and equipment costs.

Although the proposers don’t typically know all that it will take to complete your project at this early stage, it is still important to show they understand the overall process and understand the steps required.

## Step 5. Capabilities and procedure

This section acts as an additional persuasive element that shows you have a sound, thoughtful approach to your statement of work and the knowledge of the field needed to complete the project.

### 5.1 Project team and key personnel

Classify and pinpoint team management structure and list the qualifications and related experience of key team members.

### 5.2 Equipment and facilities

[Identify resource and equipment suitability](https://uplandsoftware.com/psa/resources/blog/5-tips-for-identifying-project-resources/) you plan to use and/or purchase in carrying out this project.

Indicate what equipment is an existing capability and what needs to be additionally constructed/purchased to complete this proposal assignment.

## Step 6. Anticipated benefits of project proposal

This section focuses on an explicit acknowledgment of the anticipated benefits linked to this project proposal, i.e., the undertaking of the proposed work.

The benefits of a project proposal include economic, societal, environmental, or any other benefits that could have an impact at any level.

The purpose of this section is to justify the time and expense of carrying out this project.

Speaking in more detail, when your organization is trying to acquire a project contract, taking the effort to write a concise project proposal has a number of advantages:

1. **Set yourself apart from the competition.** The most significant goal of a project proposal is to showcase the advantages of your company over competitors. A project proposal helps you clearly articulate these benefits and impact the potential client’s decision if your organization offers cheaper costs, stronger processes, or better-projected outcomes.
2. **Ensure that everyone is on the same page about the project.** Project proposals ensure that both parties understand what the project includes by stating the project’s goal and scope.  
   This shared understanding improves communication in the future and builds trust between a client and a sponsor.
3. **Establish trustworthiness.** A well-written project proposal explains how the vendor plans to execute the project and meet the client’s expectations. Project proposals may also identify potential dangers and provide ways to mitigate them. This high degree of communication persuades potential clients to know what goes into a project and what it takes to complete it.
4. **Draw attention to a problem.** Project proposals can also be utilized to draw attention to a problem that a corporation was previously unaware of. Your document could describe why a client’s problems are urgent and why they need to be resolved in the shortest timeframe possible. For example, a freelance writer writing a project proposal to build a blog could highlight how much traffic their website is losing since they don’t have one.
5. **Propose a budget and a timetable for the project.** Although a project proposal isn’t a legally binding contract, it establishes the budget and timeline for a project’s completion.  
   Vendors and stakeholders can use the document to reach a preliminary agreement on the resources and time required to complete a project.
6. **Assist with project planning.**The project proposal serves as an outline to assist you schedule resources and decide on a strategy to meet the project’s objectives once you’ve signed a contract with a client.

Developing project proposals is an unavoidable part of any project manager’s job, but it doesn’t have to be tough or time-consuming.

You can make that procedure a lot easier if you look for it. Yes, you’ve guessed it – templates!

PandaDoc is laying out some **benefits of using a project proposal template:**

The project proposal template does more than just provide you with some ready-to-use language.

**It also helps you:**

* **Make your document’s structure** obvious so that the prospect can easily explore your grasp of the client’s problem, your proposal, approach, skills, schedule, and additional activities.
* **Establish the proper, identifiable graphics** that would prompt your prospect to engage you for the next project, too.
* **Have the right, cohesive tone** that makes it easy for the prospect to see you are already involved with them and are ready to solve their problem.
* **Save a lot of time** so you may concentrate on more important things.
* **Reduce/eliminate** rework time because you’ve already got a ready-to-use template on standby.

## Step 7. Anticipated environmental impact of the proposed solution

As a fully paperless solution, PandaDoc poses no threat to the environment, i.e., its templates are entirely safe for the planet. In addition, as a remote-first global company, PandaDoc is posing no secondary threat to the environment either.

Moreover, the usage of electronic documents. fulfills one of the United Nations Sustainable Development Goals on [sustainable consumption and production patterns](https://sdgs.un.org/goals/goal12).

## Step 8. Conclusion

The conclusion of a technical proposal is the **final** paragraph/section of the proposal that brings readers back to the central idea of the proposal.

This final section should, once again, list all positive aspects of the project.

If you want to end your proposal on a solid note, urge the reader to contact you to work out project details further, remind them of this project’s benefits, and maybe remind them why you (and your team) are the right person to lead this project.

## Step 9. Nomenclature

In technical proposal writing, nomenclature can and does not have to be a part of the proposal.

Depending on your proposed project, you can use this section to layout suggestions to simplify infraspecific terminology.

Additionally, you can indicate (if necessary) a system of names and terms you would like to use in this executive summary.

If there is no need for nomenclature, a simple statement of that fact is sufficient for this section.

#### See also

[3 reasons proposals will make you more successful](https://www.pandadoc.com/blog/?p=1246)

## Step 10. References and sources

References section lists resources cited in the body text and diverts readers to those sources should they need additional reading or checking of facts.

## Step 11. Appendices

Not an essential part of the proposal but potentially a helpful one, an appendix contains supplementary material that provides a more comprehensive understanding of the research/topic at hand.

Appendices sections usually contain information that is too taxing to be included in the body of the paper.

## Valuable tips and hacks for writing a successful technical proposal

Getting funds for research takes more than having a good idea; you need to have a captivating, persuasive approach that will convince a panel of reviewers your idea is worth considering and – is likely to succeed.

**So, we give you eight tips for a winning technical proposal:**

1. **Write/present with your reviewers in mind** – make sure they understand your point, use a clear and engaging style.
2. **Present research questions clearly**, and introduce them early in your proposal.
3. **Be sure of your work’s relevance**, and explain how it affects the bigger picture.
4. **Refer to prior, supporting research** relevant to your current idea.
5. **Address potential limitations** and problems to show you understand the entire scope of the project.
6. **Present your proposal** only after having it thoroughly checked for grammar, style, and argument.
7. **Briefly summarize your goals and methods**, and anticipate conclusions; avoid technical language that would make your abstract confusing or difficult to understand.
8. **Have someone who is not in your niche read over** your proposal for clarity and style. Can they understand it? Did they find it interesting?

Remember, it is not unusual for great ideas to fall through: not because they were bad ideas but because they didn’t have a clear and convincing presentation.

So, follow **PandaDoc** tips for a winning proposal writing piece, and you should be good to go!

## Final thoughts: Proposal creation done right

If you are looking to have your proposal error-proof, clean, and automatized, we recommend including a proposal software solution into the mix. With the suitable proposal tools, an RFP is a pleasure to write.

You can also use a proposal template, a [seamless solution for a successful proposal](https://www.pandadoc.com/proposal-software/).

PandaDoc offers a [fantastic range of template options](https://www.pandadoc.com/information-technology-business-proposal-templates/) as starting points for developing your own technology business.

What is more, with PandaDoc you can choose between proposals, quotes, contracts, eSignatures, and forms to get the solution you need.

Proposers everywhere have been using PandaDoc for their technical proposal writing, so why not join the crew!

With a technical proposal that’s seamlessly put together, there’s very little that won’t go your way.