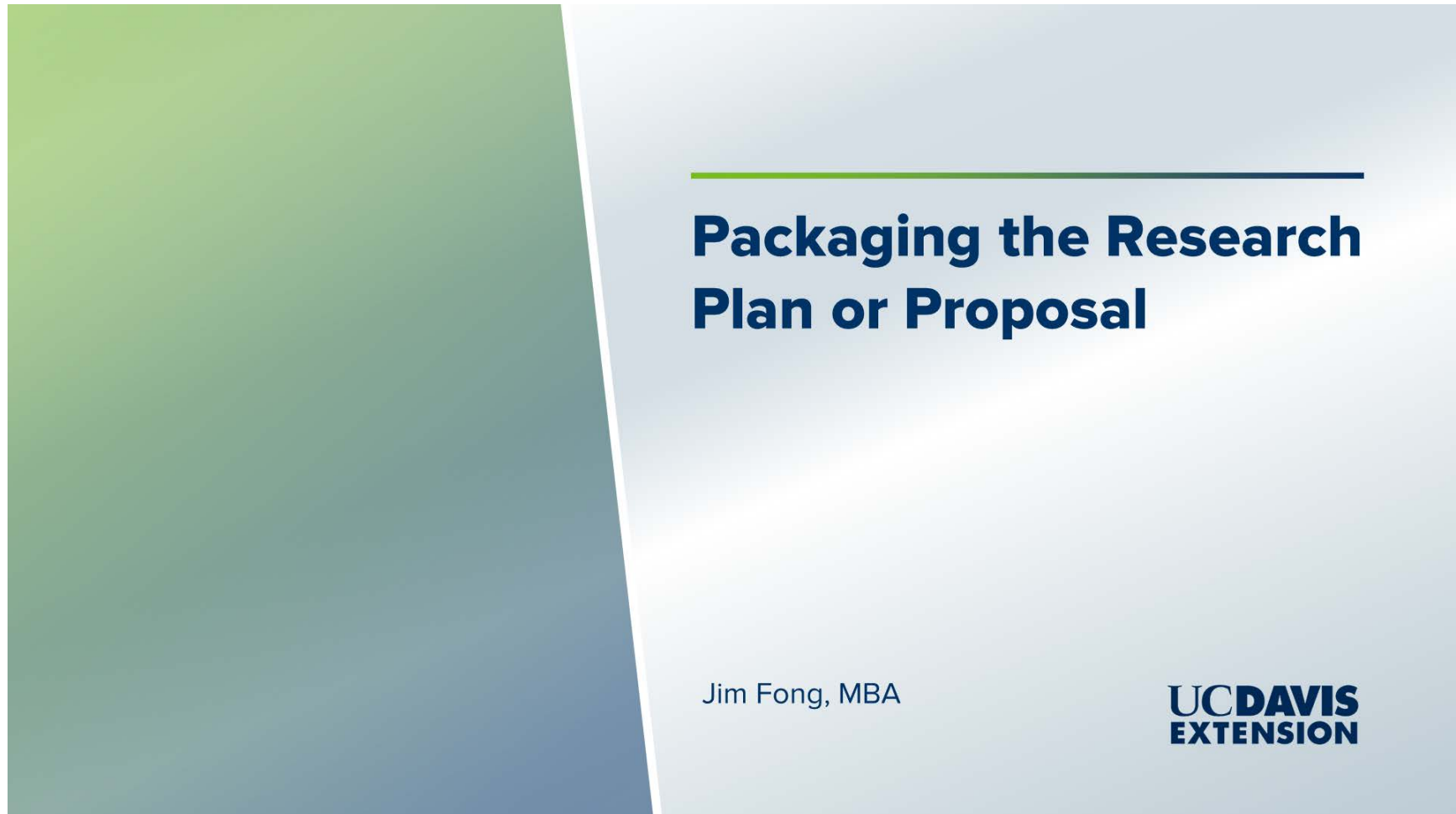


Lesson 4.5: Packaging the Research Plan or Proposal

Slide 1: Packaging the Research Plan or Proposal

The slide features a light blue background with a green-to-blue gradient on the left side. A horizontal line, colored green on the left and blue on the right, is positioned above the title. The title "Packaging the Research Plan or Proposal" is written in a large, bold, dark blue font. Below the title, the text "Jim Fong, MBA" is displayed in a smaller, dark blue font. In the bottom right corner, the "UC DAVIS EXTENSION" logo is shown in a bold, dark blue font.

# Packaging the Research Plan or Proposal

Jim Fong, MBA

**UC DAVIS  
EXTENSION**

Slide 2: Learning Objective

## Learning Objectives

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Create a professionally packaged proposal or plan

Slide 3: Package to Appeal

## Package to Appeal

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Package better to appeal  
to clients

It's persuasion tactics

Do it even if you don't  
naturally like to do it



Slide 4: Package to Go Beyond Basics

## Package to Go Beyond Basics



Good content, flow and storytelling

Go beyond

Package to persuade and  
gain advantage

Slide 5: The Art of Persuasion

# The Art of Persuasion

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Understand your reader  
and build the story

Make it deliberate and  
strategic

Use style and format to  
enhance your story

Slide 6: Adapt Style to Situation



## **Adapt Style to Situation**

Choose style to appeal to client's learning style

Visual learner? Use a more graphic style

Scientific or academic? Use rigid, scientific manner



Slide 7: Don't Underestimate the Importance of Story

## Don't Underestimate the Importance of Story

Science does not  
negate storytelling

Be excellent in  
science **and** story

Meet all professional  
expectations



Slide 8: Communicate Effectively

# Communicate Effectively



Follow directions



Choose  
appropriate design  
and format



Adapt to client's  
preferences or  
brand



Slide 9: Must Be Error-Free!

# Must Be Error-Free!

Errors are your enemy!

Undermine credibility

One error can disqualify your proposal



Slide 10: Focus on Format

## Focus on Format



Quantitative nature no  
excuse for poor packaging

Good format builds  
confidence in your abilities

Slide 11: Publication Quality Control

# Publication Quality Control

Aim for professional publishing standards

Never underestimate value of editing

Apply rigorous editing process before release