

Lesson 4.3: Components of a Research Plan or Proposal (Part 1)

Slide 1: Components of a Research Plan or Proposal (Part 1)

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EXTENSION**

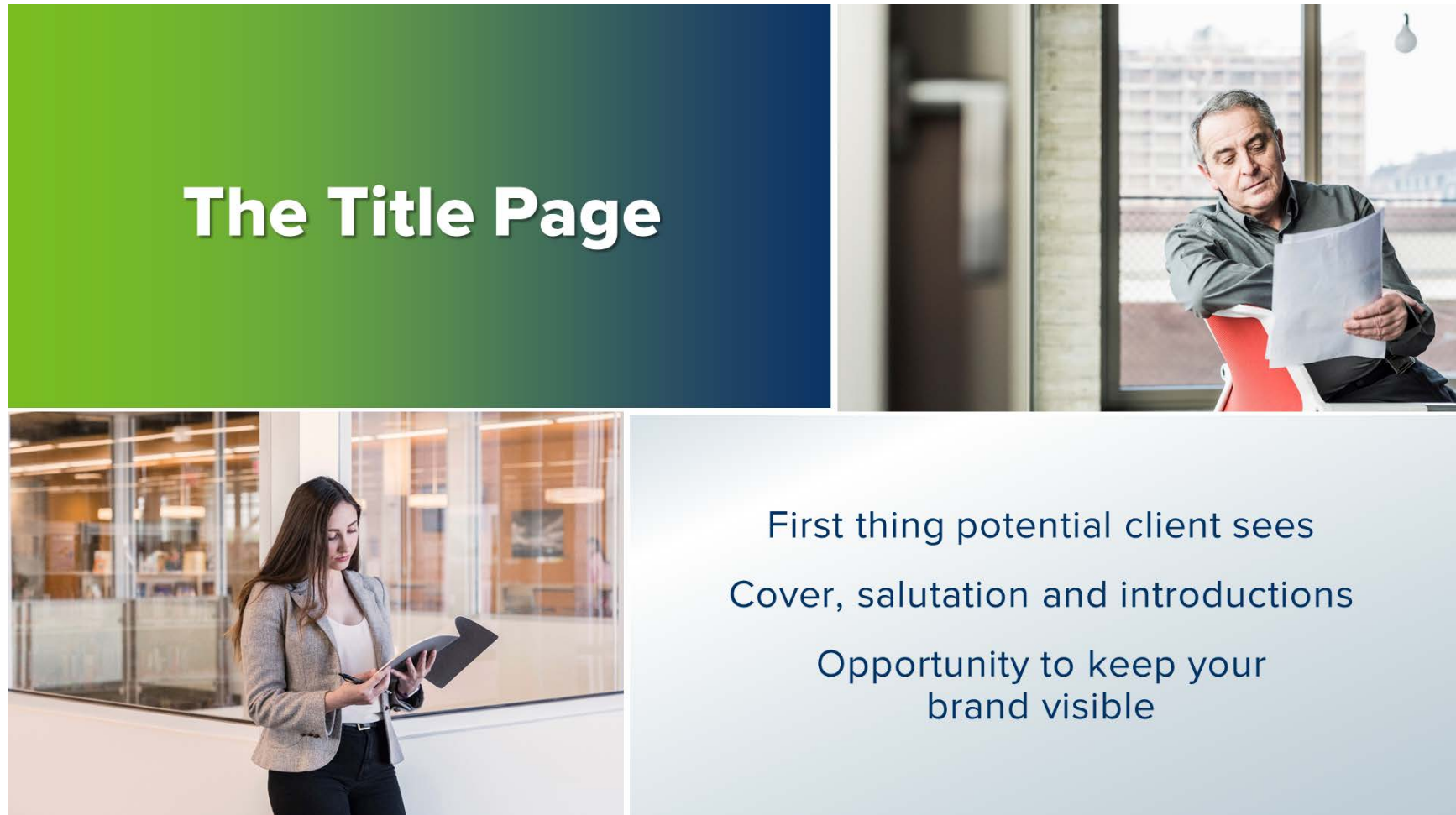
Slide 2: Learning Objectives

Learning Objectives

Identify parts of a research plan or proposal

Develop and compose one of your own

Slide 3: The Title Page



The Title Page

First thing potential client sees
Cover, salutation and introductions
Opportunity to keep your
brand visible

Slide 4: Optional Elements of Title Page

Optional Elements of Title Page



Tagline summary of
business objective

Graphics, color and style

People do judge a
proposal by its cover!

Slide 5: Overview, Problem Statement or Situation

Overview, Problem Statement or Situation

1 paragraph to 1 page long

State problem with
bulleted objectives

Recounts what client
wants you to accomplish



Slide 6: More Than Parroting

More Than Parroting



Don't just restate
RFP requirements
Make it a business dialogue

Communicate **your**
understanding of the
situation

Slide 7: More Than Mirroring

More Than Mirroring

Chance to see if client agrees with your perception

It starts the story

Checkpoint for understanding and agreement



Slide 8: Opportunity for Clarity

Opportunity for Clarity



You may have to go back and forth
You may have to rewrite proposal
Essential to ensure agreement
at point of entry

Slide 9: Secondary or Desk Research Summary

Secondary or Desk Research Summary



Also where internal research comes in

Position client's problem in larger market or environment

Depict broader understanding

Slide 10: Account Field Example

Account Field Example

Deliver facts discovered in secondary research

Client may ask for what they think they need

Educate them with data to shape the research

Slide 11: Opportunity to Provide Guidance

Opportunity to Provide Guidance

Big picture and situational

Alert client to issues and
challenges revealed

Report initial findings and
what you need to learn



Slide 12: Secondary or Desk Research Summary

Secondary or Desk Research Summary

Better frames real situation

Fills in some details

Report further research indicated



Slide 13: Methodology or Research Plan

Methodology or Research Plan



Enter the science

Processes and methods you
recommend...

Given client's situation, resources
and constraints

Slide 14: Details of Methodology Section

Details of Methodology Section

1 - 10 pages long

Detail depends on client

May include: sampling,
pros and cons, how they
will analyze data



Slide 15: Function of Methodology Section

Function of Methodology Section



Outline who you will
research and how

What tool you will use
for primary research

What questions you will ask

How you plan to analyze
the data

Slide 16: Vital Importance of Methodology

Vital Importance of Methodology



Blends science and rationale for specified research

Details recommended approach and steps

Puts plan in context of constraints and objectives

Slide 17: Layout of Methodology Section

Layout of Methodology Section

Series of bullets

Table with milestones

Flowchart or other chart

Whatever format, lay out methodology **clearly!**