

Lesson 4.4: Components of a Research Plan or Proposal (Part 2)

Slide 1: Components of a Research Plan or Proposal (Part 2)



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Jim Fong, MBA

UC DAVIS
EXTENSION

Slide 2: Remaining Parts of Plan or Proposal

Remaining Parts of Plan or Proposal

Part 2 of 2



Slide 3: Anticipated Deliverables

Anticipated Deliverables



Let client know clearly
what they will get

Give answers to client's
unstated questions

Dispel any mystery

Slide 4: Precursors to a Contract

Precursors to a Contract



Specify what you will deliver

Disclose formally what they
will and **will not** get

Slide 5: Timeline

Timeline

State how long you will take to do the job

They need this to make comparisons

Stress value balancing price and speed



Slide 6: Educate the Client

Educate the Client



Delineate
required steps



Explain the
scientific process
involved



Clarify value

Slide 7: Milestones are Critical

Milestones are Critical

Include feedback
loops in milestones

List checkpoints to
document buy-in

Slide 8: One of the Worst Things

One of the Worst Things



You're executing the research plan

Client says,
"We didn't approve that!"

Spell out every step in the milestones

Get buy-in and manage expectations

Slide 9: Budget and Value

Budget and Value

Provide clearly delineated budget

Make a case for value you provide

Level of detail depends on reputation and trust



Slide 10: Most Important Parts of a Budget

Most Important Parts of a Budget



Research plan



Application of
secondary and
internal research



Plan to
accommodate
constraints

Slide 11: View Budget as Opportunity

View Budget as Opportunity



Persuade client to trust the value you can provide

Slide 12: Use Budget to Sell Options

Use Budget to Sell Options

Offer a menu of services

Offer iterations or options

Clearly state any additional costs



Slide 13: Qualifications, References and Team Composition

Qualifications, References and Team Composition

Detail according to
client's need to know

Highlight credentials
of your people



Slide 14: Build Confidence

Build Confidence



Appreciate your own
distinguishing qualities!

Highlight experience and
respected references

What will build credibility
with this client?

Slide 15: Your Project Team

Your Project Team



Display who they'll
be working with
day-to-day



Highlight industry
specialists



Demonstrate that
your team is
capable

Slide 16: Appendices

Appendices



Catch-all for whatever doesn't
fit in proposal

Use appendices to avoid clutter
in main sections

Slide 17: Summary

Summary

Parts 1 and 2 = component parts of
research plan or proposal

Hone your skills to make it professional!