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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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



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



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



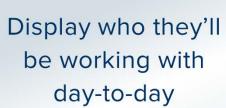
Appreciate your own distinguishing qualities!

Highlight experience and respected references

What will build credibility with this client?

Your Project Team







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

