Information Design:

Strategies to Make Your Proposal Reader Friendly

Faced with too much information and too little time, proposal evaluators skim proposals and read in a nonlinear order. Using strategies and principles from the field of information design, proposal developers can help evaluators quickly navigate a proposal and find the information they seek. When you present evaluators with a reader-friendly proposal, you substantially increase your competitive advantage.

By Roger Munger, Ph.D.

"Many documents fail because they are so ugly that no one will read them or so confusing that no one can understand them." –Karen Shriver, *Dynamics in Document Design*

Some proposals are ugly. These proposals are so ugly and so confusing that evaluators are turned off before reading begins and are baffled when they must make funding decisions. Often, these proposals fail not because of faulty arguments, technical solutions, or budgets, but because information within them is poorly structured. They fail simply because the structure of the proposal does not clearly and quickly communicate the message. Strategies and concepts from the field of information design can help in these cases.

Information design has its roots in such fields as anthropology, graphic design, ergonomics, instructional design, rhetoric and cognitive psychology. Research from these and other fields provides information designers with persuasive evidence on how readers notice, read, understand and use documents. To people in this field, *information design* has both a broad meaning and a narrower definition:

- The overall process of developing a successful document
- The way the information is presented on the page or screen (Redish, 2000, 163).

As proposal managers, you are probably most familiar with the first meaning. RFP analysis, strategy development, storyboarding, proposal production, red teams and performance evaluations are all part of the process of developing a winning proposal. Planning the production, for example, of "multiple

printed sets of a several hundred page color proposal and accompanying hyperlinked files on CD-ROM" (Kelman, 2002, 22) is part of the overall information design process. However, in this article, I focus on the narrower sense of the term. Information design also focuses on how elements such as layout, typography, text and graphics interact to help readers find, understand and use information. Designing a reader-friendly proposal does not require that you know how to use sophisticated software. In most cases, you can quickly learn how to use your word processor to create effectively designed proposals.

People in the workplace today operate under a regular condition of information overload.

Why Design Matters

The design of your proposal is important because proposals are "2.5 times more likely to win when they [proposal developers] designed and delivered key messages directly to decision makers" (Pugh, 2002, 35). That is the bottom line: good design helps you win by enabling evaluators to grasp your key messages. To understand why design has become critical to the success of proposals, you need to understand how people in the workplace process information.

When information was scarce, people had the time and motivation to read business documents from beginning to end. As a writer, you could assume that you had your readers' undivided attention and could use a linear information structure that encouraged them to read cover to cover without interruption. This was possible because documents were fewer in number and relatively short in length. Consider, for instance, when the Army Signal Corps purchased an aircraft from the Wright Brothers. Augustine (1986) reports that the government's RFP was a single page and the entire contract was two pages.

Times have changed. People in the workplace today operate under a regular condition of *information overload*. The average worker, according to a Pitney Bowes study (2001), is inundated with 204 messages a day, including e-mail, postal mail, fax, pager, and USPS Express Mail. Project managers face an even more staggering load of 363 messages a day. North American businesses sent more than 1.4 trillion e-mail messages in 2001 (ePolicy Institute, 2002). Charles Schwab & Co. receives about 15,000 resumes in a normal month (Corsini, 2001). A U.S. government order on pricing cabbage ran 26,911 words (Horton, 1997).

The proposal community is not immune to this avalanche of information. Augustine (1986) describes the case of the C-5A transport aircraft:

> Just one of the three bidders submitted—1,466,346 pages—weighing in at 24,927 pounds. The Request for Proposal issued to industry by the government itself occupied 1,200 pages — and was later supplemented by a "Clarification Document" of more than 1,600 pages. More than 500 evaluators spent months wading through the material provided by the three bidders. (248)

This is not the only case of information overload. One contractor's proposal for the Advanced Helicopter Improvement Program exceeded the takeoff weight of the helicopter (Augustine, 1986). Although these examples represent extreme cases, even proposals running a few hundred pages represent a formidable undertaking for evaluators. Faced with this glut of information, evaluators no longer read proposals from beginning to end, cover to cover. Pugh (2002) reports, "Most, if not all, evaluators will not read a competing proposal word for word" (35-36). In fact, Baldwin (1999) states, "Research proves that managers don't read (cover to cover) 80 percent of their business documents" (8). Readers in the workplace, including proposal evaluators, do not start at the beginning of a document and work through each successive point to the conclusion. For example, Charney's (1993) study of the reading behaviors of scientists revealed that they read selectively and read "parts out of order, reading the results before experimental methods and conclusions before either of those" (212).

Information designers have learned that people read in a nonlinear manner as they search a document to find answers to specific questions. A nonlinear order also means that readers start reading at different places in a document. A busy executive, for instance, may start by reading a proposal's executive summary. Another evaluator may flip directly to the budget. Still another may be most interested in the project's objectives. Pugh (2002) describes how some evaluators read a proposal:

> They read the theme; they consider the visual, they read the caption; they turn the page. (36)

When you are a proposal developer, it is often difficult to precisely predict what piece of information will interest individual evaluators. However, it is possible to structure a proposal to make it easy for evaluators to quickly find and understand the information that interests them. The following sections explore how proposal developers can structure their proposals to make them more reader friendly.

Exhibit 1. *Common rectangular design creates a dull and uninviting document.*

Create Interest

First impressions matter since readers will *see* your proposal before they read a single word. In fact, the first act of reading is the reader's decision whether to read in the first place (see, for example, Pinelli, Cordle, & Vondran, 1984). Granted, proposal evaluators do not usually have a choice as to whether they read your proposal. However, an *interested* evaluator is likely to understand your arguments better, notice the elements that distinguish your solution from the competition, and favorably assess your proposal.

Your audience must determine the structure of your proposal. Early in my career, a colleague reminded me, "People give money to people." Until computers begin evaluating proposals (and this technology may be closer than we would like to admit), we need to design proposals with the idea that a real human being is going to read our work — and not some vague entity we call, for example, the Department of Defense. Proposal evaluators, like most of us, have too much to do, have too little time to do it in, and would like to leave the office before sunset. Ask yourself a simple question: "Would I want to read 20 (or 50) proposals that look like mine?" If not, you can probably add some design elements to generate more interest in your proposal.

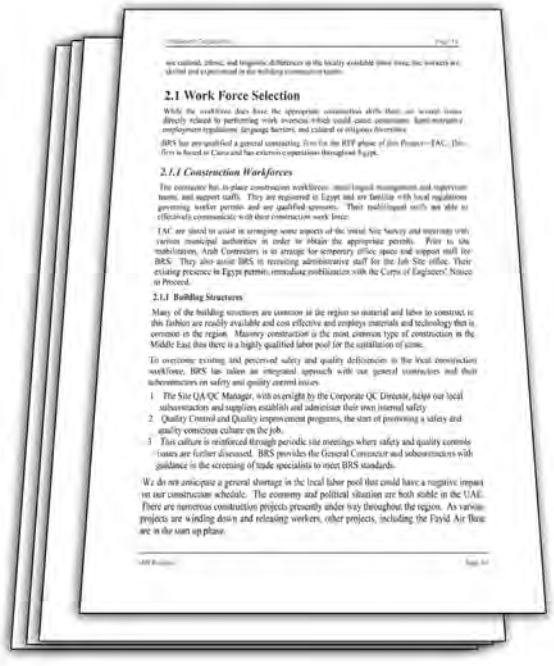
Many readers find pages designed as perfect rectangles to be dull and uninviting. A page with paragraphs piled one on top of another creating a rectangle of full-justified text is not very interesting (see Exhibit 1). By breaking the expected rectangular design, you can create interest and make text easier to read.

First impressions matter since readers will see your proposal before they read a single word.

Some strategies for generating an interesting and reader-friendly design include the following:

- Break margins
- Use columns.

Break margins, for instance, by outdenting headings, using a ragged right justification, and indenting subordinate information. In Exhibit 2, headings hanging in the margins are easier to see. A ragged-right justification breaks the rectangular shape of the text and avoids the unequal space between words, hyphenation and "rivers" of white space commonly found in full-justified text. Finally, information such as lists and graphics are indented to break the rectangle.



2.1 Work Force Selection

2.1.1 Construction Workforces

2.1.1 Building Structures

1 The Site QA/QC Manager, with oversight by the Corporate QC Director, helps our local subcontractors and suppliers establish and administer their own internal safety
2 Quality Control and Quality improvement programs, the start of promoting a safety and quality conscious culture on the job.
3 This culture is reinforced through periodic site meetings where safety and quality concerns/issues are further discussed. BRS provides the General Contractor and subcontractors with guidance in the screening of trade specialists to meet BRS standards.

We do not anticipate a general shortage in the local labor pool that could have a negative impact on our construction schedule. The economy and political situation are both stable in the UAE. There are numerous construction projects presently under way throughout the region. As various projects are winding down and releasing workers, other projects, including the Fayid Air Base are in the start up phase.

Exhibit 2. *Breaking the expected rectangular design, you can create interest and make text easier to read.*

Using a multicolumn design (see Exhibit 3) for your proposal also creates interest and offers you several advantages over the traditional single-column design to which word processors default:

- You can fit more text on a page
- You have more options in sizing your graphics
- Your text is easier for readers to scan quickly
- Your text appears more interesting (Markel, 2002).

The less you make your proposal look like the first-year English papers you wrote as a student, the more likely you are to generate some interest in evaluators to read your proposal.

Meet Expectations

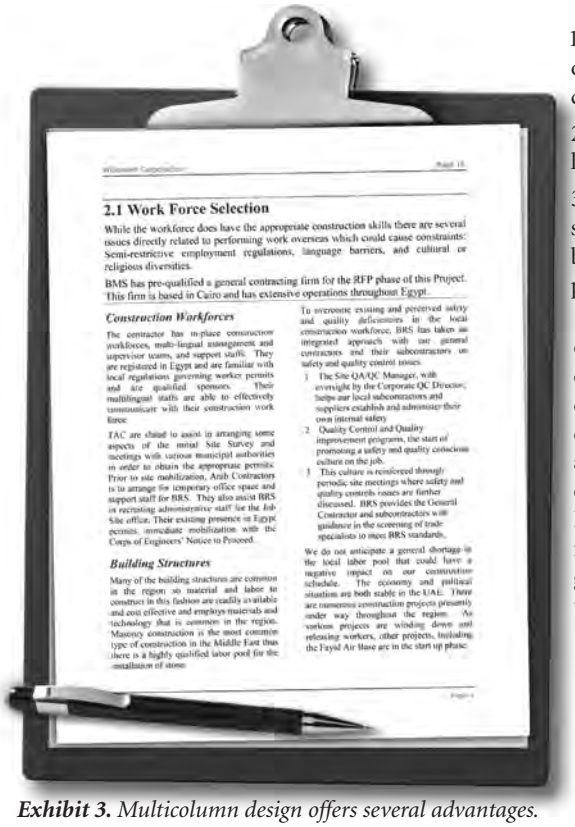
Evaluators expect you to follow directions. They expect you to give them information requested in the RFP — in the order in which it was requested. The evaluators' job is to assess quickly and accurately a stack of proposals. To accomplish this task, they typically use some type of evaluation form. For example, an evaluator may use a form that requires him or her to assess, among other things, "adequacy of resources." However, if you organized your proposal in such a manner that you discussed your adequacy of resources in a different section or decided to label this information with a different term, the evaluator will have to hunt for this information. An evaluator may decide that you failed to include this information, if he or she cannot quickly locate the information. You do not want evaluators saying, "The information was all mixed up in different sections. It took me forever to figure it out." Many evaluators will not devote that much time to trying to find information in your proposal.

A reader-friendly proposal helps its readers accomplish their goal: accurately assess a stack of proposals and go home before midnight.

You can help evaluators do their job (and increase your chances of winning in the process) if you organize your proposal so that it reflects the RFP or the evaluation criteria. If, the RFP requires you to address topics A, B, C, and D, then meet evaluators' expectations by organizing your proposal so that it addresses these topics in the order suggested. The more evaluators have to flip back and forth between sections while completing their evaluation forms, the greater the chances are that they may miss critical information or just give up and score a "0" for that criterion. Moreover, use the vocabulary used in the RFP or evaluation criteria to label the sections of your proposal. If you are writing a sales proposal and the RFP requests that you include a "seller profile," you invite trouble if you label this section "corporate overview." A reader-friendly proposal helps its readers accomplish their goal: accurately assess a stack of proposals and go home before midnight.

Reveal Structure

Evaluators should be able to quickly understand the overall structure of your proposal. Markel (2002, 186) in *Technical Communication* suggests three main steps to follow to reveal the structure your document:



2.1 Work Force Selection

While the workforce does have the appropriate construction skills there are several issues directly related to performing work overseas which could cause constraints: Semi-restrictive employment regulations, language barriers, and cultural or religious diversities.

BMS has pre-qualified a general contracting firm for the RFP phase of this Project. This firm is based in Cairo and has extensive operations throughout Egypt.

Construction Workforces

The contractor has in-place construction workforces, multi-lingual management and supervisor teams, and support staffs. They are registered in Egypt and are familiar with local regulations governing worker permits and are qualified operators. Their multilingual staffs are able to effectively communicate with their construction work force.

TAC are slated to assist in arranging some aspects of the initial Site Survey and meetings with various municipal authorities in order to obtain the appropriate permits. Prior to site mobilization, Arab Contractors is to arrange for temporary office space and support staff for BRS. They also assist BRS in recruiting administrative staff for the Job Site office. Their existing presence in Egypt permits immediate mobilization with the Corps of Engineers' Notice to Proceed.

Building Structures

Many of the building structures are common in the region so material and labor to construct in this fashion are readily available and cost effective and employs materials and technology that is common in the region. Masonry construction is the most common type of construction in the Middle East thus there is a highly qualified labor pool for the installation of stone.

To overcome existing and perceived safety and quality deficiencies in the local construction workforce, BRS has taken an integrated approach with our general contractors and their subcontractors on safety and quality control issues.

1. The Site QA/QC Manager, with oversight by the Corporate QC Director, helps our local subcontractors and suppliers establish and administer their own internal safety.
2. Quality Control and Quality improvement programs, the start of promoting a safety and quality conscious culture on the job.
3. This culture is reinforced through periodic site meetings where safety and quality controls issues are further discussed. BRS provides the General Contractor and subcontractors with guidance in the screening of trade specialists to meet BRS standards.

We do not anticipate a general shortage in the local labor pool that could have a negative impact on our construction schedule. The economy and political situations are both stable in the UAE. There are numerous construction projects presently under way throughout the region. As various projects are winding down and releasing workers, other projects, including the Fayid Air Base are in the start up phase.

Exhibit 3. *Multicolumn design offers several advantages.*

1. Create a detailed table of contents
2. Use headings liberally
3. Use topic sentences at the beginning of your paragraphs.

A table of contents provides evaluators with a concise overview of your content and the structure of your proposal. Providing such a framework will guide evaluators' understanding of your proposal. Ineffective tables of contents feature nonspecific entries— "problem," "solution," and so on—and lack depth (for example, include only first-level headings). In contrast, an effective table of contents provides descriptive entries such as "overview of proposed software" and generally includes at least two levels of headings. Finally, take full advantage of your word processor's ability to automate the process of creating a table of contents.

Technical communication should be clear and easy to read, not full of suspense.

To support the skimming of text and to break up long stretches of text, use headings liberally. Descriptive headings reveal structure by reinforcing themes, signaling relationships between major sections, and announcing the content of specific sections. Using headings to divide your proposal into meaningful sections informs readers where one set of ideas ends and a new set begins, allows your proposal's structure to be organized perceptually, and "provides a chance for the reader to collect some thoughts and prepare for the next section" (Oborne, 1995, 100). In short, headings help evaluators understand how the parts of your proposal relate to each other and to your overall argument.

The first thing evaluators want to know about a paragraph is what it is about. Consequently, you should declare the main point of your paragraph at the start of your paragraphs. Markel (2002) cautions, "Technical communication should be clear and easy to read, not full of suspense" (257). Do not bury your point in the middle or end of a paragraph, because an evaluator may never read that far. The first sentence of each paragraph should function as a summary or preview of what follows. If you state your point first, your paragraphs will be much easier to read and evaluators will better follow your argument.

Facilitate Navigation

Once evaluators become motivated to read your proposal and understand the overall structure, they need to quickly locate answers to their questions. You need to provide navigation aids to help them do this. I suggest the following aids.

- Table of contents
- Page numbers
- Headers and footers (for example, section title and page number)
- Chapter or section titles
- Dividers and tabs
- Cross-reference tables
- Indexes.

Since these aids "involve nitty-gritty 'production' matters, they can easily be dismissed as unimportant or peripheral" (Kostelnick, 1996, 9). However, they are crucial to the success of your proposal. If evaluators cannot easily locate what they want, they often give up. Of course, not every proposal will feature all of these navigation aids. Factors such as budget, paper size, printing process, binding method, and number of copies will often determine which aids you can use effectively.

Create Manageable Chunks

To make your proposal easier to follow, you need to break your content down into manageable pieces of information. In other words, you need to *chunk* your information. Breaking your proposal into small units and grouping related information is the first step in organizing your information (Keyes, 1993). Think back to the last time you rented a DVD (or video). Most likely, the store did not just have a pile of DVDs for you to sift through. Instead, the DVDs were divided into various categories such as "New Releases," "Drama," and "Action." This structure made it easier for you to find the movie you wanted. You must organize your proposal in a similar manner by organizing information into categories that make sense to the evaluators.

The DVD rental analogy illustrates another important point about chunking: the categories you create are often subjective and depend on your audience. DVDs, for instance, can also be chunked by release date ("Classics"), ratings ("G-Children"), format ("Cartoons") and so on. Lannon (2003) offers the following advice about creating digestible units of information:

> "Chunking requires careful decisions about exactly how much is enough and what constitutes sensible proportions among the parts. Don't overdo it by creating such tiny segments that your document ends up looking fragmented and disconnected." (240)

The key point to remember is that your readers' needs drive your decisions.

You can create chunks of information by using white space. Undifferentiated text requires "more effort from the reader, and the writer loses control over how the reader will make his or her way through the text and interpret and remember it" (Keyes, 1993, 639). (See Exhibit 4.)

In contrast, by using white space and headings to visually emphasize chunks of information, you can help evaluators to

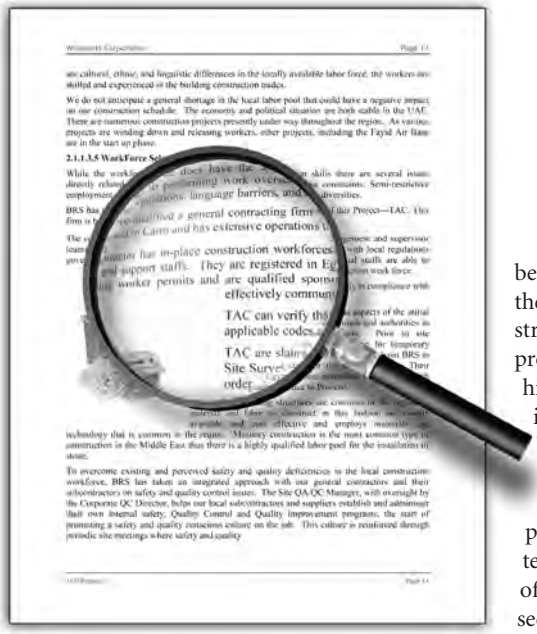


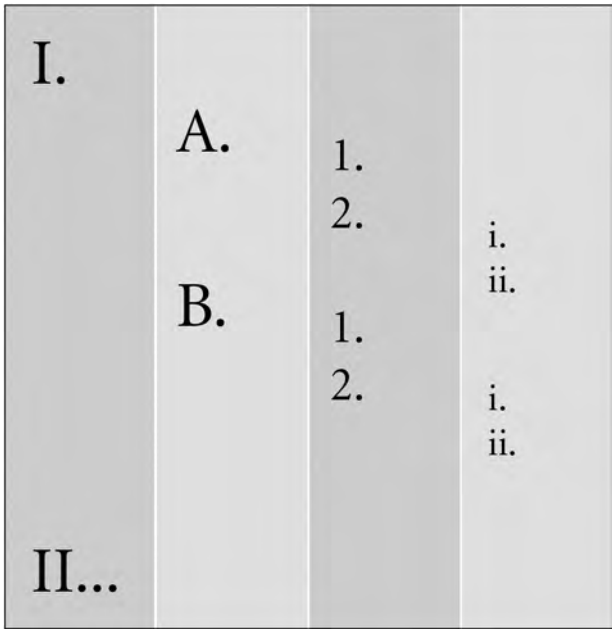
Exhibit 4. *Undifferentiated text fails to reveal the structure and organization of content.*

better understand the underlying structure of your proposal (see Exhibit 5). Notice in Exhibit 5 that the headings are closer to their related paragraphs of text than the end of the previous section. This helps to emphasize each section as a cohesive group.

Prioritize Information

After you have broken your information into manageable chunks, you need to prioritize your information and visually communicate this hierarchy. In a traditional outline, you can quickly see how higher-level content relates to lower-level content.

For instance, the Roman numerals represent major sections of a proposal. "A" and "B" are lower-level content that is related to the Roman numeral section in which they are embedded. Lowercase "a" and "b" signal even lower levels. The deeper you embed content in an outline, the less important it is perceived. As a proposal developer, you must quickly communicate your proposal hierarchy on each page. However, using tags (for example, II. B. 1. a. Network Management or 2.2.1.1 Network Management) from your outline is not very effective.



For instance, some proposals use a decimal numbering scheme and retain this outline numbering in the final proposal. However, most readers have a difficult time keeping straight where in the information hierarchy they are if they are reading a section labeled 3.2.2.1.3. Decimal numbering in a proposal is more effective as a method of communicating the structure of your proposal when it is combined with other design features.

Use type size, type weight (for example, boldface type) and indentation to create a visual hierarchy (Keyes, 1993). Readers can quickly process visual contrasts on a page. In Exhibit 6, the first-level head is outdented, bold, and uses a bigger type size than the second-level heads. The second-level heads are aligned with the left margin, bold, and use a type size smaller than the first-level. The third-level head is indented, not bold, and uses the smallest type size. The accompanying text under the third-level head is also indented to emphasize the subordinate nature of the information. The further you place information from the left side of the page, the less visual emphasis (priority) you give it.

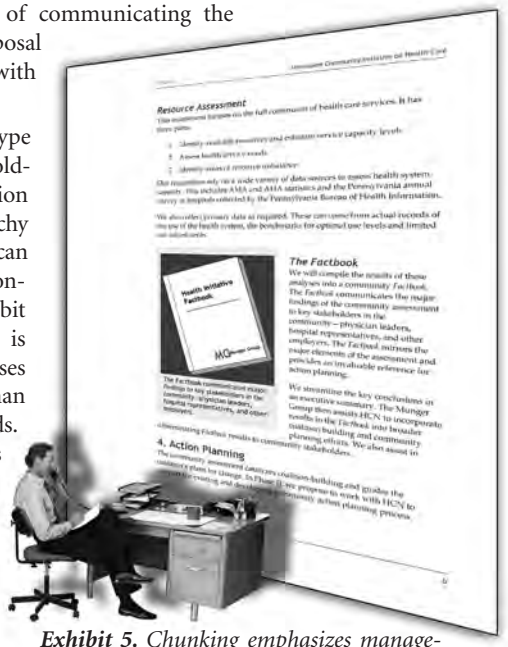


Exhibit 5. *Chunking emphasizes manageable units of information.*

Of course, Exhibit 6 represents just one possible page payout. Third-level heads and accompanying text do not have to be indented. If your proposal features six levels of information, then you would likely end up with text columns only an inch wide if you further indented each subsequent section. Your goal should be to create clear visual contrasts. Keyes (1993) reports that a document's visual structure is "more effective when it uses large, contrasting changes in position on the page and surrounding white space — in addition to type features such as boldness or change in size" (641). The key concept to remember is that you can use position on the page, type size and type weight to visually show your reader how information is related.

Differentiate Information Types

Finally, evaluators need to be able to quickly distinguish between various types of information. To help your readers accomplish this task, you can use the design strategy called *filtering*. Keyes (1993) describes *filtering* in the following manner:

Filtering creates layers of information within the visual hierarchy. Filtering visually identifies and differentiates various types of information, so that readers can find what they need. Conversely, less relevant information can be filtered out. (641)

Different types of information in your proposal such as themes, section summaries, body text, lists, captions and notes need to be visually distinct. That is, evaluators need to be able to tell in a glance the type of information at which they are looking. This visual structure supports the evaluators' task of skimming information.

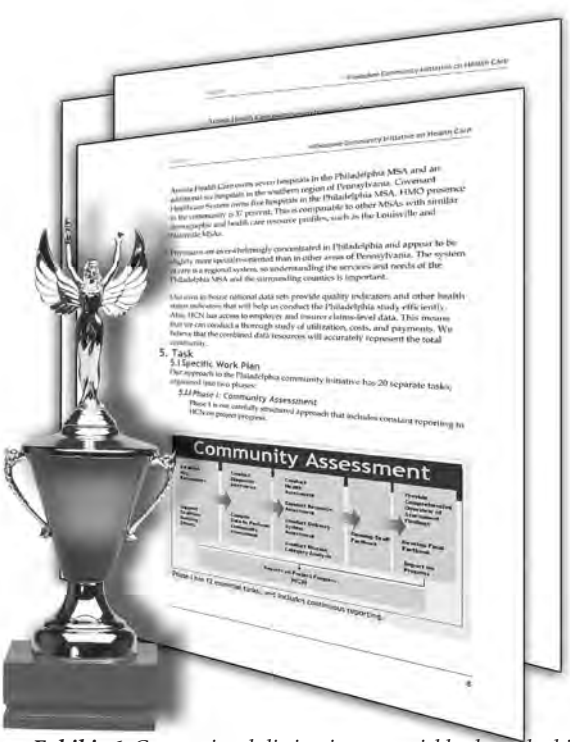


Exhibit 6. *Create visual distinctions to quickly show the hierarchy of your information.*

The STOP technique (see, for example, Starkey's retrospective article, 2000) is a time-tested example of how proposal developers can structure a proposal so that various types of information are visually distinct. Following the STOP technique, proposal developers would display thesis sentences in bold type or underlining. Starkey (2000) reports that by emphasizing text in such a manner "an evaluator could gain a fair grasp of the thrust of the proposal just by reading them [thesis sentences] before delving into the details" (44). Furthermore, the two-page spread consistently structured information types: phrase-structured title, thesis sentence, text argument, figure and two-part caption.

You can achieve a consistent visual structure in your own proposal by using changes in the weight of type, in the size of type, in the case of the type (for example, all capital letters), in the style of type (for example, using sans serif typeface such as Arial), and in position of text on the page. Graphical elements such as icons, text boxes, screens (for example, background shading) and rules (for example, vertical and horizontal rules that divide a page into sections) can also be used to differentiate information types. (See Exhibit 7.)

For some proposal developers paper is already dead—they publish proposal materials on CD-ROM, deliver information using e-mail and submit proposals via the web.

Although some of the research literature on typography is contradictory or inconclusive, when differentiating information types keep in mind the following:

Typographic cues are most effective when *both* changes in type weight and position (for example, outdented or indented information) are used (Keyes, 1993).

Less is more when using typographic cues (Williams & Spyridakis, 1992).

Text composed of both uppercase and lowercase letters is superior to text set in all capital letters both for reading speed and accuracy (Oborne, 1995).

Your goal when differentiating types of information in your proposal is to use just enough typographic and spatial cues to make information visually distinct without overwhelming evaluators with a dozen design elements all screaming for their attention.

Future Challenges

How evaluators read and interact with proposals will certainly change in the future as new delivery methods are developed. Grice and Krull (2001) report that paper may become outmoded:

> "Despite evidence to the contrary over, under, and in our desks, offices and filing cabinets, paper delivery of information is nearing the end of its usefulness." (137)

For some proposal developers paper is already dead. For example, they publish proposal materials on CD-ROM, deliver information using e-mail and submit proposals via the Web. The Internet clearly offers proposal developers powerful new design options for communicating proposal ideas.

However, do not make the same mistake early Web-content developers made. You cannot just *dump* online a print proposal and expect evaluators to be able to read these electronic texts

Exhibit 7. *Filtering using horizontal rules and changes in type and position.*

Although your tools and delivery method may change, your focus should remain on meeting the needs of your readers.

as if they were printed. Online information creates its own set of challenges for readers. For example, Nielsen (2000) reports, "Reading from computer screens is tiring for the eyes and about 25 percent slower than reading from paper" (106). Consequently, pages must feature concise text and an easy to skim layout.

Many of the strategies for print documents apply to the design of electronic documents as well. With online documents, you still need to display, organize and connect content. However, online documents offer you new design elements such as hyperlinks, navigation bars, search engines, animation, audio and video. Although your tools and delivery method may change, your focus should remain on meeting the needs of your readers.

Conclusion

Whether your evaluators will read your proposal in hard copy or as an electronic document, you still must make it easy for evaluators to quickly find and understand information. As you strive to effectively communicate your message, include the organization and presentation of your proposal in your overall proposal development and review process (see Freeman & Freeman 2000). Using the strategies I have discussed will make your proposal evaluators' jobs easier and more productive. As a result, your reader-friendly proposal will have a competitive advantage.

Proposal evaluators, like you, are busy and overloaded with information. Make sure your proposal doesn't get lost in the crowd.

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