Writing Proposals: What are they and what questions do they need to answer

UBCO Master of Data Science – DATA 552

UBC

Class Outline

1. Networking exercise: Building confidence

2. Recap: Wednesday's lecture

3. Emails: subject lines, attachments, and organization

4. Email: group practice activity

5. Proposals: purpose, audience, and organization

6. Assignment 2: Overview

7. Homework

8. List of objectives

Try it: Building Networking Confidence

Find someone in the class you've spoken to the least. Ask them how they like the program.

Alternatively, if they can think of a time when they really enjoyed a presentation or a conversation they had with someone, ask them why they liked it.

Additional Instructions: As you chat, take notes so that you can write your partner's responses in your portfolio. I am going to ask you to share your partner's responses at the start of Wednesday's class.

Recap: Wednesday's Lecture

Tone

- Polite and respectful
- Direct and concise, but NEVER ~~defensive~~, ~~confrontational~~, or ~~frustrated~~.
- Professional, but relaxed (*i.e.,* not formal)
- Inclusive
  - Use you and we language
  - Use gender neutral language
  - When possible, use names.

Recap: Wednesday's Lecture

Structure and layout

- Include the most important information at the front
- Make your ideas and points easy to scan with headings, bullet point lists, and tables as appropriate.
- **Anticipate your audience's questions and answer them**
- Be to the point
- Keep ideas chronological

Language and word choice

- Simple, easy-to-understand (no biz-speak or technical jargon!)
- Concise and dynamic/active

Emails

General Reminders

- Always capitalize the first letter after a period.
- Always capitalize "I" when you are referring to yourself.
- Write in complete sentences.
- Avoid smiley faces and other emojis.

Subject Lines

- Be specific and concise

  Rockslide vs. Hwy 97 Rockslide vs. Hwy 97 Rockslide Removal Schedule vs. Hwy 97 Rockslide – Social Media Update

Emails, continued

Attachments

- Give the attachment a specific name that will mean something to the receiver.
- Include a cover letter for the attachment. Don't just send an attachment without including any information in the body of the email.
- Avoided wordy introductions to the attachment.
  - We don't like attached please find, herewith please find attached, please find attached, or attached herewith please find…

Organization

- Get straight to the point
- Be brief, but specific
- Use chronological order

Don't forget to add the attachment.

Try it: Improving Emails

Question 1: In groups of three, please consider how the two emails (on the paper in front of you) can be improved and then re-write them accordingly.

Instructions: When you select your groups, please make sure that you are working with at least one person you have never worked with before.

- It may be easier to have one person share their screen with Google Doc open and others collaboratively edit and make suggestions

Link to Activity

Sarah –

It was hard making headway with Jim Martinez, but finally we're looking (in the best-case scenario) at a demonstration of what our software can do by mid-May, as I established in my first telephone conference with Jim last Monday at 9:00 a.m. He was out Wednesday and Thursday (I didn't see any reason to try calling on Tuesday), but on Friday he told me that we'd need a sample app. But prior to that, Magnabilify requires an NDA. Tuesday's meeting should clarify things. Let me know what you think.

Frank

Sarah –

Last week you asked me to approach Magnabilify Corporation, the software developers, to see whether they might have any interest in our customizing some security applications for their computer systems. I finally got through to Jim Martinez, corporate vice president in charge of software, and we have planned a face-to-face meeting at his office next Tuesday.

The next steps, as I understand them under Magnabilify's protocol, will be to enter into a nondisclosure agreement, to develop a sample application (in less than two weeks), and to schedule a demonstration shortly after.

Can you and I chat before Tuesday's meeting?

Frank

Example from Bryan A. Garner, *HBR Guide to Better Business Writing*

Email Two: The Not-So-Great Version

Subject: Hello there!

Hal –

It's been ages, I know, but I've been meaning to tell you Just how effective I think you've been as the editor of the Daily Metroplitan these past seven years. Although I canceled my subscription a few years back (LOL) – the papers kept cluttering the driveway – I buy a copy at the coffee shop almost every day, and I always tell people there just how good the paper is. Who knows, I may have won you some subscribers with all my gushing praise! Believe me, I'm *always* touting the good old *DM*.

Anyhoo, I have a mentee I'd like you to meet. You'll soon be thanking me for introducing you to her. She would like an internship, and I know she'll be the best intern you've ever had. Her name is Glenda Jones, and she is A-1 in every way. May I tell her you will contact her? (With good news, I hope!) It can be unpaid. I know your paper has fallen on tough times – but she wants to get into the business anyway! Silly girl. Ah, well, what can you do when journalism seems like it's just in the blood?

Expectantly yours,

Myra

P.S. You'll thank me for this!

Email Two: The Version That Will Get Results

Subject: Request for an Interview

Hal –

May I ask a favor of you? Glenda Jones, a really sharp mentee in the township's Young Leaders program, wants to pursue a career in journalism, and she's eager to learn how commercial news organizations work. Would you spend 15 minutes chatting with her at your office sometime this month, before school lets out? I know it would be a meaningful introduction for her. You'll find that she is a poised, mature, smart, and incredibly self-possessed young woman.

She tells me that she's looking for an unpaid internship. After a brief interview, perhaps you'd consider giving her a one-week tryout as your assistant. I know you've been a mentor to many aspiring journalists over the years, but here you have a real standout: editor of her college newspaper, Phi Beta Kappa member, state debate champion.

No pressure here. If it's a bad summer for you to take on an intern, I'll completely understand. But please meet with her if you can. I've asked her to write to you independently, enclosing her resume, to give you a sense of her writing skills. Thanks very much. Hope you and your family are doing well.

Myra

Proposals: What are they

In *Technical Communication*, the seventh Canadian edition, John M. Lannon, Don Kelpp, and Shannon Kelly assert that "a proposal offers to do something or recommends that something be done" (p. 307).

This is a very simplistic definition. A proposal does so much more than this.

Proposals: Purpose

When you write a proposal, regardless of what type of proposal you are writing, you are trying to do two things:

1. "First, a proposal helps readers understand a problem's *causes* and *effects*" (Johnson-Sheehan et al., 2019, p. 168).

2. "Second, it tries to persuade readers that a specific step-by-step plan offers the best solution for that problem" (p.168)

Proposals: Types

There are many different types of proposals:

- Solicited
  - Your boss or professor asks you propose a solution to a problem
  - A formal Request for Proposals (RFP)
- Unsolicited
  - You see an opportunity or problem and propose a solution for fixing it
- Formal
  - Responding to an RFP
- Unformal
  - An email suggesting a new product or initiative to your boss

Try it: Getting to know the proposal audience and their needs

Question 2: What kinds of questions will the proposal audience have when they get your proposal document?

Would the audience of an unsolicited proposal have additional questions? What are they?

Instructions: Discuss your response with a partner and write your answer in your portfolio.

Proposals: General structure

Whether your audience has asked you for the proposal or not, the proposal should have

- An introduction
  - This is similar to an executive summary: it "defines [the] problem, stresses its importance, and offers a brief description of the proposed solution" (Johnson-Sheehan et al., 2019, p. 169)

- An analysis of the problem (and relevant background info)
  - What are you trying to solve? How was the problem caused? What negative business outcomes is this problem causing? Or, on a more positive note, what business goals would be furthered by solving the problem?

Proposals: General structure, continued

- A plan for solving the problem
  - What do you want to do and how will taking this action solve a pressing business need or further an important business goal?

- A cost benefit analysis
  - Why is taking this approach to solving the problem better than another approach (or not taking any action at all)?

- Conclusion
  - The conclusion "looks to the future and stresses the importance of taking action" (p. 169).

Proposals: Getting started by asking the right questions

When starting a proposal document or responding to an RFP, you need to make sure that you understand:

Problem and Audience

- The problem: what caused it and what are the effects?

- What does the audience know about the problem? What do they need to know?

- Why the audience should care about the problem: how does this problem effect business operations and objectives?

- How does the audience make decisions?

- What might (positively or negatively) influence the audience's decision ?

Proposals: Getting started by asking the right questions

The Proposed Solution

- What does your solution look like?

- What questions do you need to answer before you can complete the solution?

- How much will this cost?

- What tasks do you need to accomplish in order to complete the solution?

- What questions will the audience have about the proposed solution and your ability to complete it?

- Why is this solution better than others?

Proposals: Using the MACJ technique

Brainstorming what sort of information you need to include in written document is the MADMAN stage of the writing process.

The MADMAN represents the idea and brainstorming stage of the writing process:

"*He's full of ideas, writes crazily and perhaps rather sloppily, gets carried away by enthusiasm or anger, and if really let loose, could turn out ten pages an hour*" (Flowers, 1981. p834)

Proposals: Using the MACJ technique

During the MADMAN stage your goal is to come up with as many questions about the problem, solution, and audience as you can think of.

After the madman, comes the architect, followed by the carpenter, followed by the judge:

- The architect decides what ideas and pieces of information are relevant, and what can be discarded.

- The carpenter puts everything together in a cohesive and logically organized document.

- The judge comes along and strictly judges every writing and organizational decision.

Writing Assignment #2

This assignment has two parts: a two-page semi-formal proposal and a tentative report outline (15% total).

These two documents are the preliminary documents for your report and presentation assignments (worth 25% and 15%).

_____

*Please note that this is an individual assignment

Writing Assignment #2 – The proposal component

The proposal is a two-page document that outlines
- the problem you would like to solve,
- the significance of that problem,
- how you propose solving this problem using data analysis, and
- the proposed deliverables of this project (a report and 5-minute presentation).

Your goal/purpose is to bring the problem/situation to the audience's attention, to highlight why addressing the problem will help the audience further their business objectives, and to illustrate why your project is the best way of addressing the problem.

Your audience is someone you know (work for) who has the ability to approve or not approve the project. They have not asked you to do this work.

Writing Assignment #2 – The outline component

The outline is a one-page document that identifies what questions your report will answer and in what order.

Your goal/purpose is to show that you have considered what your final deliverable looks like, what information the audience needs you to include, and in what order the audience needs it.

Your audience is someone you know (work for) who did not ask you to undertake this project, but who has approved your proposal to carry out the project.

Writing Assignment #2, continued

This assignment, like all your other written assignments, will need to be accompanied by an email cover letter outlining the attachments, your purpose for sending them, and what you would like the email receiver to do with them.

You may also wish to include an email conclusion that tells the audience what you would like them to do next.

Writing Assignment #2, continued

Rubric

- You can find the assignment description and rubric on GitHub

Template

- Some examples and a textbook chapter on proposals to the labs/lab_2/resources GitHub file.

Additional Resource

- Natasha Terk outlines the report and proposal writing process, what questions to ask, and how to organize the document in *Reports, Proposals, and Procedures.* (2.5 hour listen on audible.)

Objectives

- Students will start working through the discomfort of engaging in a conversation with someone they don't know.

- Students will become comfortable with organizing email communication so that the important information is at the start and additional details are easy to determine by scanning.

- Students will always consider their tone when writing emails and how their choice of tone will impact the email's success.

- Students will be able to identify the purpose of a proposal document and its many types, and they will be able to identify what questions a proposal should answer.

- Students will recognize the value of separating their writing activities into four distinct stages.