

# Yu Yang

Oct. 17, 2020

# Learning Objectives for Today

- Review of the last lecture
- Basic elements of a proposal & how to write it
- Group practice: present a proposal (extra credits)

# Review

- Email

- **A great progress !!!**
- Name of the receiver, comma

Dear Mr.Yu:    Dear Mr.Yu yang,  
dear teacher,

- If two emails are related, forward the previous email with your new messages

- LaTeX

- Overleaf

Hi XXX,

Just a quick follow up. XXXXX

----- Forwarded message -----

From: **Yu Yang** <newsyangy@gmail.com>

Date: Thu, Oct 15, 2020 at 11:00 PM

Subject: Re: Email

To: Liu Yicheng <lykcl0428@163.com>

Hi XXX,

Thanks for your email and information. And also, the assignment 0 will not count for the final grade. No worries.

Best,

Yu Yang

# What is a proposal?

# What is a proposal?

- Example:
  - Business proposal
  - Research grant
- What are the key functions of a proposal?

Sell, advertise, inform, reduce, impact, explain,  
describe, identify, convince, market, present idea,  
avoid, document, gather information, offer, persuade,  
solve a problem, understand

# Types of proposals

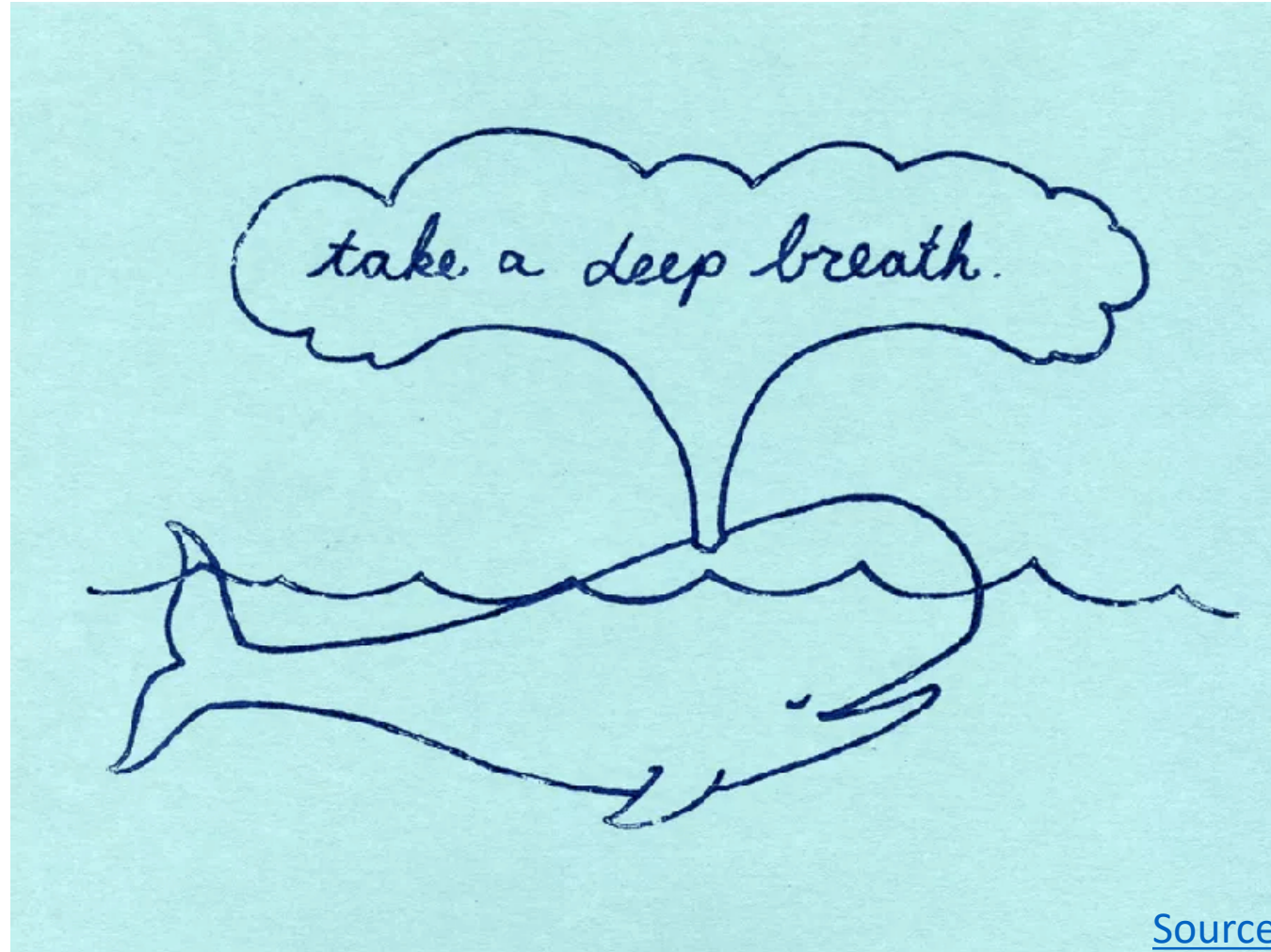
- Solicited Proposals
  - You are asked to submit proposal by the client (RFP)
- Unsolicited Proposals
  - Buy our services
  - Fund our project



[Source](#)

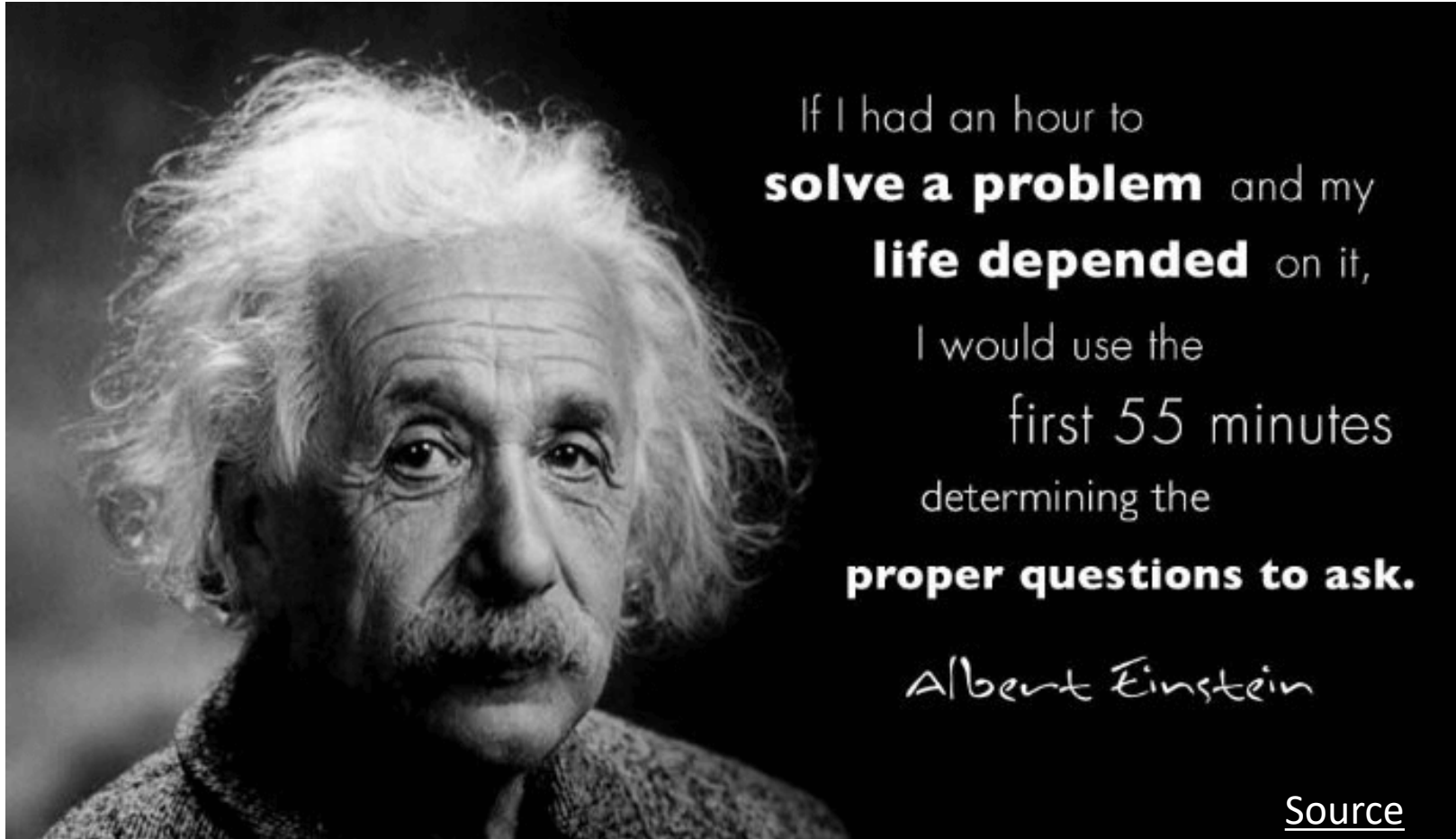
Write a business proposal in  
6 steps

# Step 1: Make sure you have all the information you need





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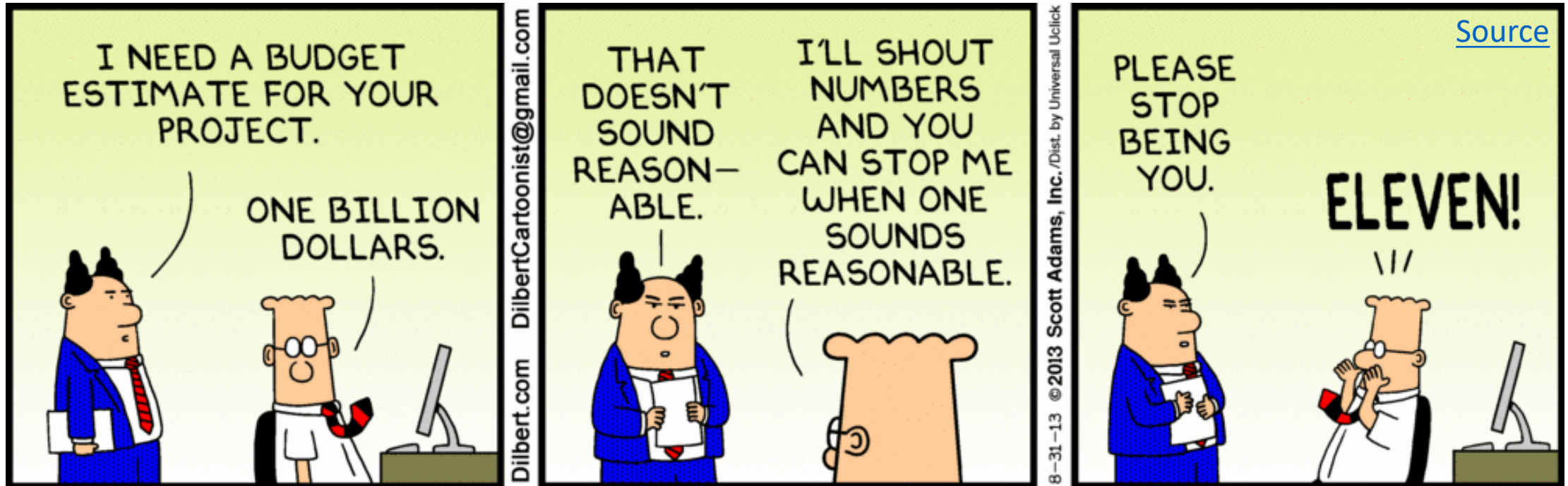
- Have I spoken to the client?
- Do I fully understand the requirements?
- Can I deliver what they are asking for?
- Is this the first attempt to solve this issue?
- Do I need to do some research?
- Who will be reading the proposal?
- What are the budget and timeline expectations?

# Step 2: Sketch out the scope of the project

The amount of work that needs to be completed to satisfy the clients requirements.

- The who's:
  - Who will carry out the (what) work?
- The what's:
  - What needs to be done? (resources, cost, customer expectation)
- The how's:
  - How long?
  - How to approach the task?
  - How to divide the work?
- The why's:
  - Why to chose your particular solution
- The when's:
  - When to start
  - When to meet your milestones
  - When to finish

# Step 3: Estimate the cost



# Step 4: Start writing your business proposal

- **Title** or cover page
- Table of contents (optional but useful for longer proposals)
- **Executive summary**
- **Problem statement**
- **Proposed solution / Outline of approach**
- **Deliverables**
- **Timeline**
- **Pricing**
- Company information
- Case studies (optional but recommended)
- CTA (Call to action) / how to proceed

# Executive summary

- Introduce your company to your buyer
- Provide an overview of your company goals
- Showcase your company's milestones, overall vision and future plans
- Include any other relevant details

# Problem statement

- A well-defined problem statement does two things
  - It shows the prospect you have done your homework instead of sending a generic pitch
  - It creates an opportunity for you to point out a problem your prospect might not be aware they had in the first place.

# The proposed solution

- Entire process
- Be concrete and detailed
- Demonstrate potential challenges



# Deliverables

- How and when you provide all your deliverables

WEEK	MILESTONE	PROCESS
1	Briefing	Review ideas and outline, define project parameters and allocated budget.
2	Review	Brainstorm solutions based on the briefing's set objectives, values and long-term project goals.
3	Proposal	Present 3 varying solutions for review. Client provides input and feedback to select which proposal suits the project best.
4	Final Proposal	Return to present the final design proposal for final approval.

# Timeline

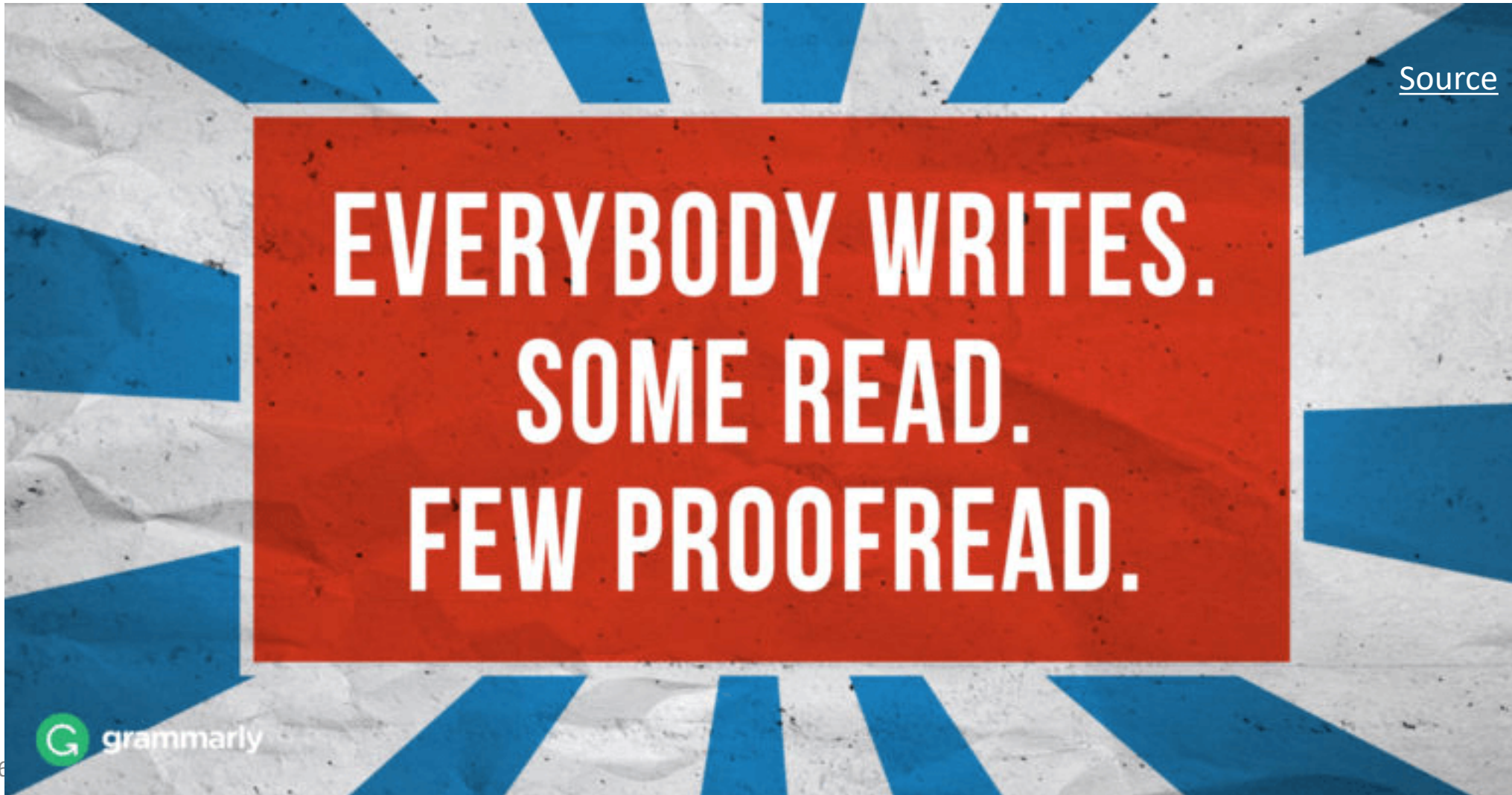
Project Schedule	Project XX- Customer XX- Timeline Example																											
Your Text Here	January				February				March				April				May				June				July			
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28
Project Deliverable 1																												
Project Deliverable 2																												
Project Deliverable 3																												
Project Deliverable 4																												
Project Deliverable 5																												
Project Deliverable 6																												

[Source](#)

# Price

Expenses	Unit	# of Units	Unit Rate	Cost
<i>Personnel</i>				
Trainers	Per day	3	173.3	\$ 520
<b><i>Subtotal Personnel</i></b>				<b>\$ 520</b>
<i>Services</i>				
Participant Transportation	Per person	40	10	\$ 400
Catering	Per person	55	17.28	\$ 950
<b><i>Subtotal Travel</i></b>				<b>\$1,350</b>
<i>Other Costs</i>				
Materials and Handouts	Per person	55	12.28	\$ 675
Venues	Per day	3	221.5	\$ 665
<b><i>Subtotal Other Costs</i></b>				<b>\$1,340</b>
<b>Total Expenses</b>				<b>\$3,210</b>

## Step 5 – Edit and proofread



# Step 6: Send your proposal (and follow up!)

- Email
- Online submission process
- **Follow Up**