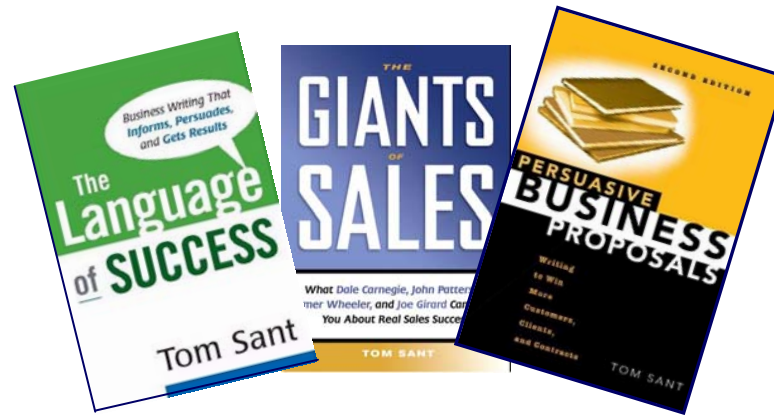


# Proposing to Win



## How to Write a Winning Business Proposal

Dr. Tom Sant  
Hyde Park Partners

# Where Are We Headed?

1. Proposals and problems
2. Audience and purpose
3. Deadly sins
4. Winning habits
5. Questions & answers





**\$**  
value



**Complexity**

# RESUME

**Current Address**  
12 Glass Lane  
Boulder, CO 23849  
(303) 555-6145

**Permanent Address**  
34 Apple Court  
Glenade, CA, 19038  
(714) 555-7145

**E-mail Address and URL**  
hsnoro@ucoloro.edu  
<http://www.ucoloro.edu/~hsnoro>

## OBJECTIVE

A position in software development.

## EDUCATION

B.S. in Computer Science, expected May 1998  
University of Colorado, Boulder, CO  
Cumulative G.P.A. 3.66

## WORK EXPERIENCE

**Freelance Computer Consultant, September 1997-present**  
Create World Wide Web home pages and customize computer systems for clients in the Boulder, CO, area.

**Intern, June-August 1997**  
Microsoft Corp., Redmond, WA  
Worked as software design engineer intern on SNA Server 3.0. Implemented name-space providers (Windows FONT DLLs) written in C for a variety of network protocols, including TCF/TF, Novell IPX, Lanman, Banyan VINES, and AppleTalk.

**Undergraduate Research Assistant, September 1996-May 1997**  
University of Colorado Laboratory for Computer Science  
Worked with Professor Donald S. Patel in the parallel and distributed operating group. Ported UNIX applications to XDK, a prototype embedded implementation for the Intel x86.

**Lab Attendant, September 1995-May 1996**  
Center for Academic Computing, University of Colorado  
Maintain computer hardware and assist users on Windows 95 and Macintosh operating systems and various software packages.

**Crew Leader, Summers 1993 and 1994**  
Mim's Millers, Glenade, CA  
Supervised crew and managed bakery's daily operations.

## COMPUTER SKILLS

**Languages and Software**  
C, C++, Java, LaTeX, HTML, Word, WordPerfect.

**Operating Systems**  
UNIX (Linux, Ultras, SunOS), Windows 95, Macintosh.



Writing proposals? RFP answers?

# Escape Route # 1

Cloning  
previous proposals.



Cutting and pasting can result in  
embarrassing errors!



# Escape Route # 2

“Data Dumps” or “More is Better!”



Nobody buys based on the “thud factor.”  
If it’s not meaningful to the customer, *leave it out!*

# Escape Route # 3

Talking about what we know and love best.



Focus on your prospect, not on yourself!

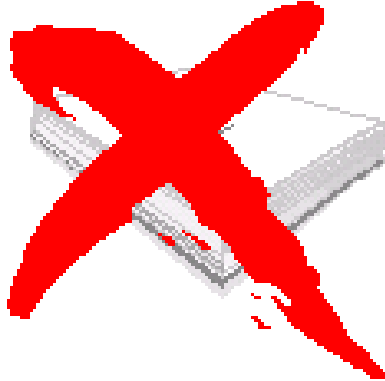
# Common Mistakes



**Price Quote**



Commodity



**Product Spec**



Transaction, not a solution



**Company History**



Self-centered



Audience:  
*Who?*



Style.

- Level of expertise
- Personality type
- Role in the process

- Word choice
- Amount of detail
- Evidence and emphasis

Audience:  
*Who?*



Style.

- Facts
- Opinion
- Motivation



- Informing
- Evaluating
- Persuading




Purpose:  
*Why?*



Structure.

# Zoning Out...

	Information	Evaluation	Persuasion
Expert	 <b>Comfort Zone</b>		
Highly informed			
Somewhat informed			
Lay			

# Executives Expect a Different Kind of Message

**Peer-to-Peer \* Outcome Oriented \* Bottom-Line Focused**

	Information	Evaluation	Persuasion
Expert	<b>Comfort Zone</b>		
Highly informed			
Somewhat informed			<b>Persuasion Zone</b>
Lay			

# The Seven Deadly Sins...

1. No focus on the client's business problems and payoffs
2. No persuasive structure
3. No clear differentiation
4. Failure to offer a compelling value proposition
5. Key points are buried--no highlights, no impact
6. Difficult to read--full of jargon, too long, too technical
7. Credibility killers--misspellings, grammar errors, wrong client name, inconsistent formats, etc.

---

# Four Keys to Better Proposals

*Winning More, Working Less*



## Proposing to Win

1  
Get a NOSE Job

2  
Pack Your Case

3  
Show Me the Money

4  
A KISS for Luck



# 1

## Get a N-O-S-E Job





# The Right NOSE Can Help You Win

HOW TO OBTAIN



## A Better Looking Nose

Improve Your Personal Appearance  
My free book tells you how I guarantee to  
improve the shape of your nose by remod-  
eling the cartilage and fleshy parts, quickly,  
safely, and painlessly, or refund your money.  
The very fine, precise adjustments which  
only my new patented Model 25 Nose  
Shaper possesses, make results satisfactory  
and lasting. Worn night or day. Over  
100,000 users. Send for free book to

M. TRILETY, Pioneer Noseshaping  
Specialist, Dept. 193, Binghamton, N. Y.

# The Structure of Persuasion

- **Needs:** The customer's issues, pains, or opportunities.
- **Outcomes:** The benefits of those needs: *the motivation*.
- **Solution:** A recommendation that will solve the problem.
- **Evidence:** Proof of your differentiators.



problems,  
*and the deal.*

me from meeting

or service that

and on budget:

# Matching the Customer's Thinking

- 1. Am I getting what I need?** Or only what they have?
- 2. Is it worth doing?** Or is there a better way to invest our time and money?
- 3. Can they really do it?** Can they deliver on time and on budget?



# 2

## Pack Your Case



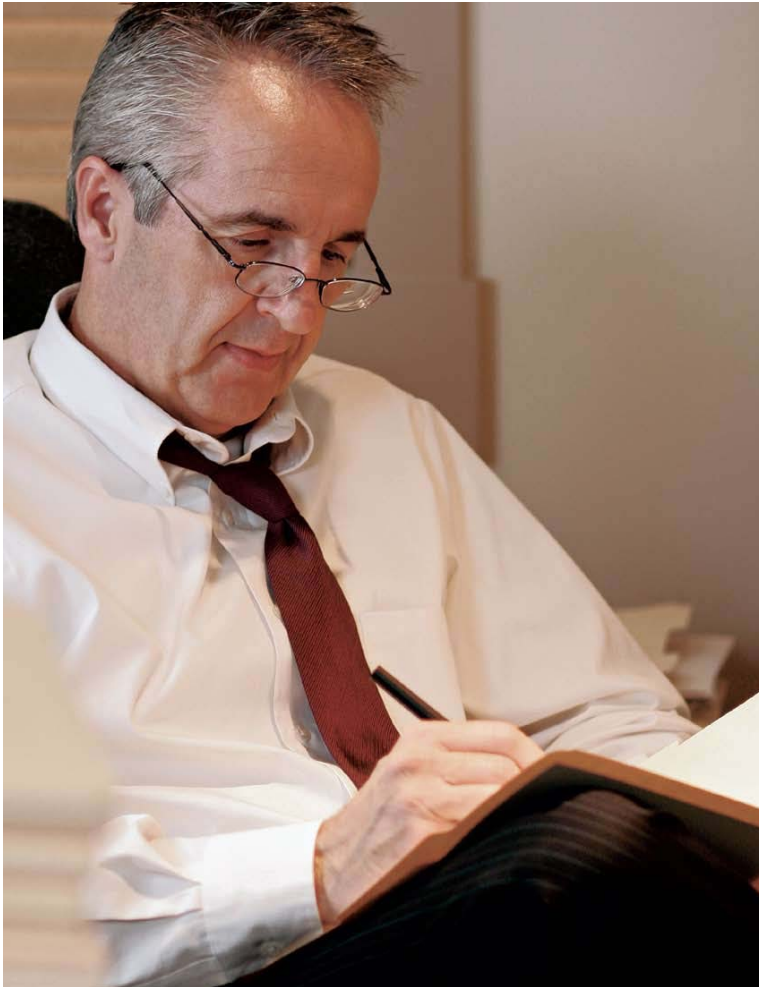


# People buy from people they trust

## The Primacy Principle Cognitive Dissonance



# The Trust Equation



$$T = \frac{C \times R}{S}$$

**Where:**

**T = trust**

**C = credibility**

**R = rapport**

**S = risk of self-serving  
behavior**

# Selling on Trust



Where most  
sales messages  
focus

$$T = \frac{C \times R}{S}$$

Where:

T = trust

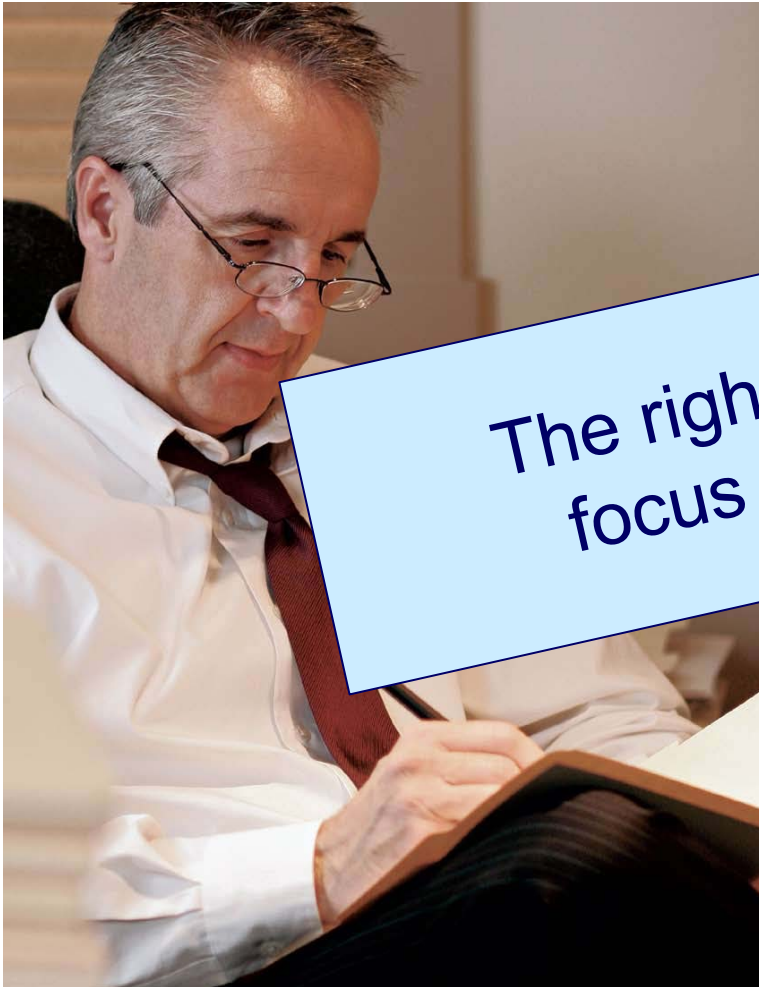
C = credibility

R = rapport

S = risk of self-serving  
behavior



# Selling on Trust



The right  
focus

$$T = \frac{C \times R}{S}$$

Where:

T = trust

C = credibility

R = rapport

S = risk of self-serving  
behavior

# Rapport Always Precedes Credibility

Gaining trust = gaining influence.



Minimize cognitive dissonance.

# Why Do Rapport and Client Focus Matter?

## The Primacy Principle



## The Principle of First Impressions

# What Kind of First Impression Are You Making?



“Don’t waste my time with a bunch of boilerplate!”

- Title— “Proposal”
- Initial focus?
- Your name or the client’s?
- Are you pushing a product or proposing a solution?

# Seven Client-Centered Questions

1. Client's problem, issues?
2. Why is it a problem?
3. Desired outcomes?

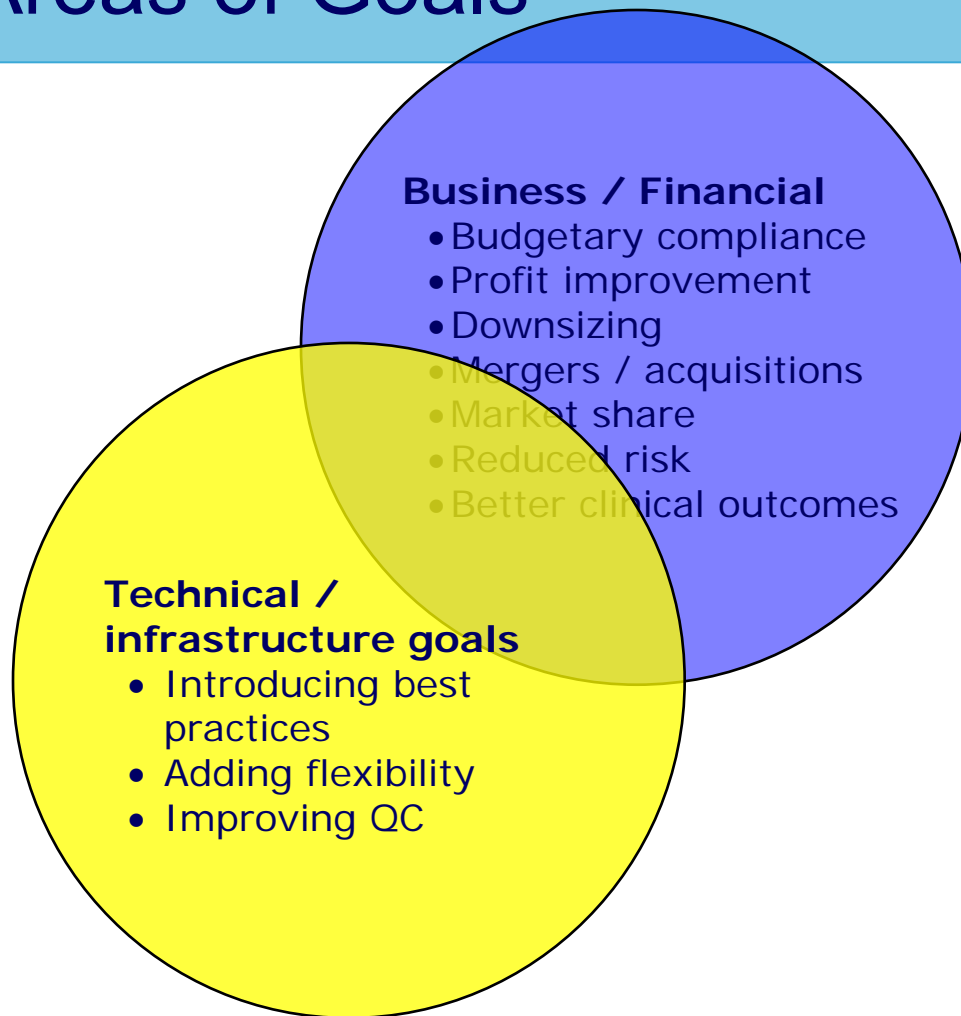


# Four Areas of Goals

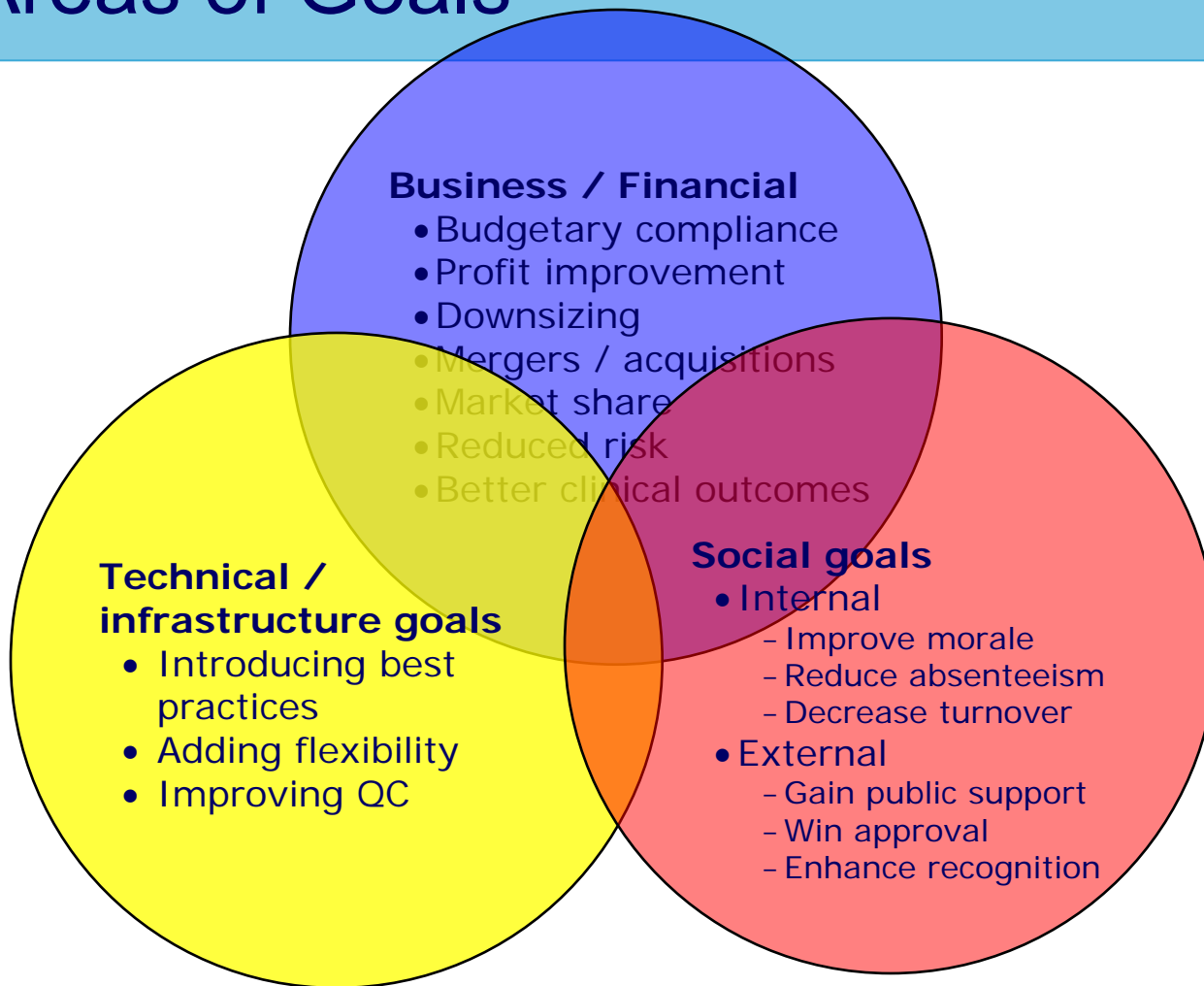
## **Business / Financial**

- Budgetary compliance
- Profit improvement
- Downsizing
- Mergers / acquisitions
- Market share
- Reduced risk
- Better clinical outcomes

# Four Areas of Goals

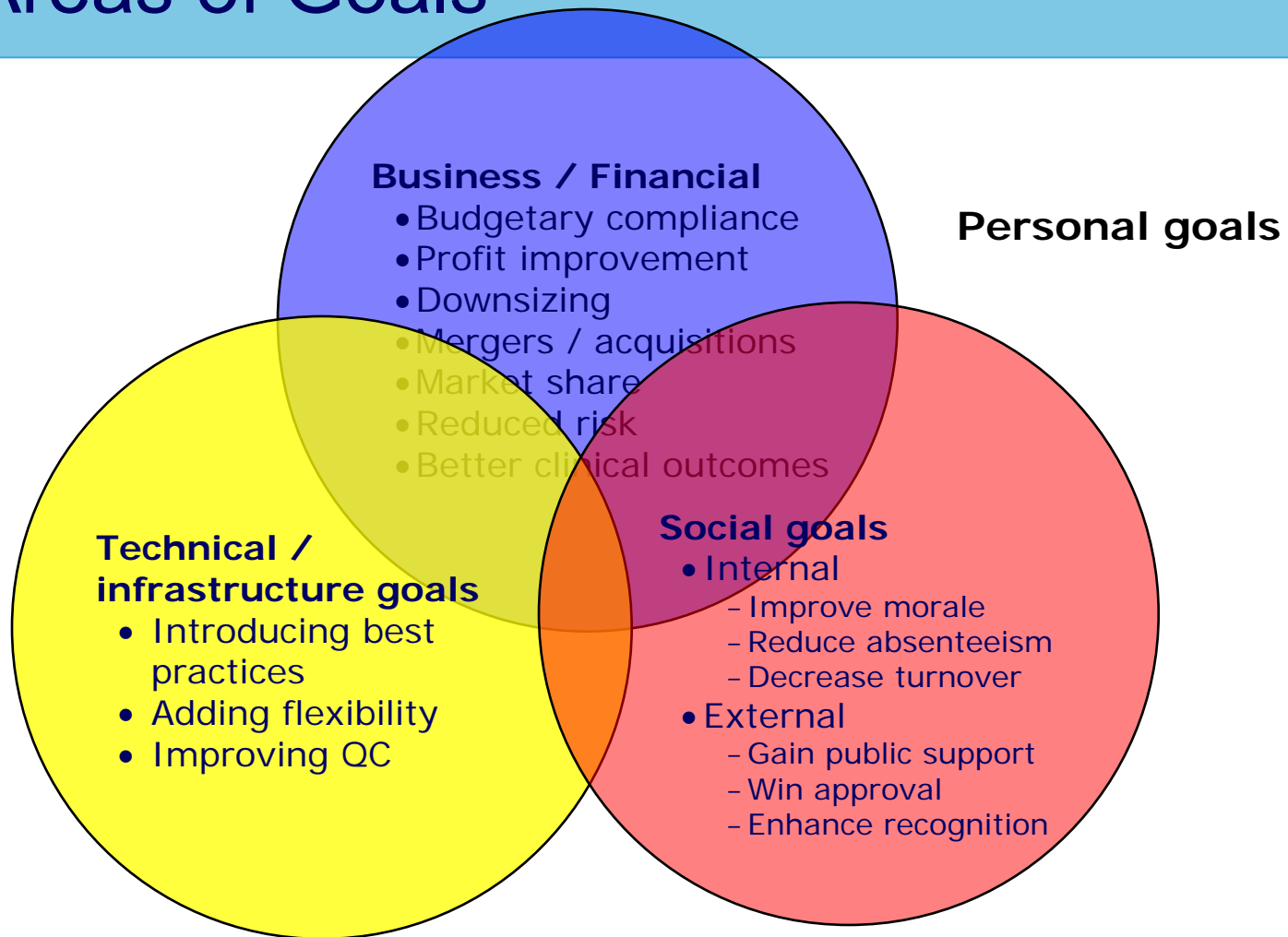


# Four Areas of Goals





# Four Areas of Goals



# Seven Client-Centered Questions

1. Client's problem, issues?
2. Why is it a problem?
3. Desired outcomes?
4. Most important?
5. Potential solutions?
6. Probable results?
7. Why are we the right choice?





# Show Me the Money!



**FACT:** *If you don't show value,  
winning is a game of chance*

**You must establish superior value**

*based on technical, contractual, managerial,  
quality, or service differentiators,*

**or the customer will choose based on  
price.**



# The Value Proposition

$$(Value_s - Cost_s) > (Value_a - Cost_a)$$

where:

$Value_s$  = the value of your offering

$Cost_s$  = the cost of your offering

$Value_a$  = the value of the next best alternative

$Cost_a$  = the cost of the next best alternative

# Four Principles of Effective Value

1. Make sure the client cares
2. Measure it
3. Picture it
4. Link it to your differentiators



---

# 4

## A KISS for Luck



# My Life and Welcome to It...

## *First Sentence of a Case Study:*

Under the SafeHarbors contract, Amalgamated Technology provides system engineering, technical, program and project support for acoustic and non-acoustic measurement, evaluation, processing, acoustic signature, secure (information assurance [IA]) networking, analysis, fabrication, assembly, acoustic intelligence (ACINT), operations, and maintenance of a broad array of sensors, associated processing systems and Acoustic Acquisition System Design (COTS/NDI), development, and testing support.

✓ *56 words*

✓ *16 commas!*



# My Life and Welcome to It...

## *Second Sentence:*

Our efforts encompass system design review and interface specifications, which include acoustic performance; evaluation, and analysis of structural and dynamic anomalies; power requirements; radiated and self-noise evaluations; electromagnetic interference (EMI) with biological and structural elements; towed array handler interfaces; calibrations for baseline ACINT gathering; IA; certification and accreditation; acquisition planning; financial, budget, and milestone submits/presentations; and development/operational testing and evaluations.

✓ *60 words*

✓ *11 semicolons!*

# My Life and Welcome to It...

## *The rest of Paragraph # 1:*

Also we develop, build, operate, and maintain special test equipment including LTAS, MAPS, ADTAS, and ATTENDS. This extensive, long-term involvement with NSWCCD mission areas continues to be a significant contributor to the U.S. Navy's submarine, surface, and air intelligence, surveillance, and reconnaissance (ISR) statutory requirements and Chief of Naval Operations' (CNO) vision of "SEAPOW 21" initiatives.



Which raises the question:

*What's wrong with these people?*

# KISS: Keep It Short and Simple

The first principle of persuasive writing:

**Be clear.**

*Live by the “first time right” rule.*



# Four Pseudo-Languages that Don't Work

**1. Fluff**

**2. Guff**

**3. Geek**

**4. Weasel**





## Fluff:

- Grandiose claims
- Vague generalities
- Clichés
- No proof

# Forget the Fluff!

Here are a few examples....

Anything look familiar?

World class

Best of breed

Leading edge

State of the art

Quality focused

Uniquely qualified

Innovative

High performance

Synergy

User friendly


Integrated

Partnership

Seamless

Robust





High Street Technology offers a world-class expertise in facility management combined with best-of-breed products and customer-focused service to produce seamless, integrated solutions for our clients. We optimize productivity and assure reliability and efficiency by providing unique control systems that are user-friendly, robust, and extensible. When you choose HST, the difference is...*quality!*

# Fluff!

High Street Technology offers a **world-class** expertise in facility management combined with **best-of-breed** products and **customer-focused** service to produce **seamless, integrated** solutions for our clients. We **optimize** productivity and **assure** reliability and efficiency by providing **unique** control systems that are **user-friendly, robust, and extensible**. When you choose HST, the difference is...*quality!*


*Guff.*



*Guff.*

**Guff:**

- Long sentences
- Too many big words
- Too much passive voice



The dimensionality of expected project problems coupled with the limited time available for preparation means that choices will have to be made to assure viability of the most critical analytical processes. Thus, a leveraging of problem similarities and process relationships to allow for sharing of resources and solutions, will be needed to contain cost and staff expenditures and assure maximum payoff from effected solutions.

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– Average sentence length: 32 words

The **dimensionality** of **expected** project problems coupled with the **limited** time **available** for **preparation** means that choices will have to be made to assure **viability** of the most **critical analytical processes**. Thus, a **leveraging** of problem **similarities** and process **relationships** to allow for sharing of **resources** and **solutions**, will be needed to contain cost and staff **expenditures** and assure **maximum** payoff from **effected solutions**.

- Average sentence length: 32 words
- Words with three syllables or more: 18

The dimensionality of expected project problems coupled with the limited time available for preparation means that **choices will have to be made** to assure viability of the most critical analytical processes. Thus, a **leveraging** of problem similarities and process relationships to allow for sharing of resources and solutions, **will be needed** to contain cost and staff expenditures and assure maximum payoff from effected solutions.

- Average sentence length: 32 words
- Words with three syllables or more: 18
- Passive voice: both sentences







## Geek:

1. Disregard for the audience
2. Overuse of jargon and acronyms
3. Too many assumptions
4. A focus on technical details instead of functions or differentiators

# An Example

This approach coalesces the capabilities of multiple corporate technology solutions providers that specialize in systems integration, client/server development, Internet/Intranet information systems, and information security.

# Another Example

The Commercial WebBanking full-featured wire module includes a simplified menu structure, the ability to support Domestic and International Repetitive and Free-Form Wire requests, Bank and Customer Maintained Wire Templates, Quick Entry of Repetitive Wires and optional security code validation and effective date entry.



# Weasel

# Watch the Weasel!



## Weasel

- Unnecessary use of weasel words
- Hyperqualification of every statement
- Passive voice
- Subjunctive constructions

# Weasel words



“can be”

“might”

“helps”

“could”

“may be”

“enable”

“allow”

“up to”

“like”

“virtually”

“significantly”

# Subjunctive Junk

“We **would** like to thank you for allowing us to submit this proposal...”

“This process **would allow** one person to perform research and **significantly** increase productivity...”

“You **can be assured** that it **should be possible** to achieve the requested timelines for this project.”

“We **believe** that we have proposed an effective solution, based on the information we have **at this time.**”





During the proposal evaluation period, I would like you to know that Simpson Technologies is committed to exceeding the highest customer satisfaction standards. As a company, we are aware of your ambitious efforts and want to assure you that we are, and will continue to be, positioned to stand, as "One Company/One Team" in support of your organization. Through the implementation of our National Account Coordinator team, we are confident that we can meet and exceed your expectations for the installations and implement a service program to meet all of your requirements as well.

During the proposal evaluation period, I **would like** you to know that Simpson Technologies **is committed to** exceeding the highest customer satisfaction standards. As a company, we **are aware** of your ambitious efforts and **want to assure you** that we are, and will continue to be, **positioned to stand**, as "One Company/One Team" in support of your organization. Through the implementation of our National Account Coordinator team, **we are confident that we can** meet and exceed your expectations for the installations and implement a service program to meet all of your requirements as well.



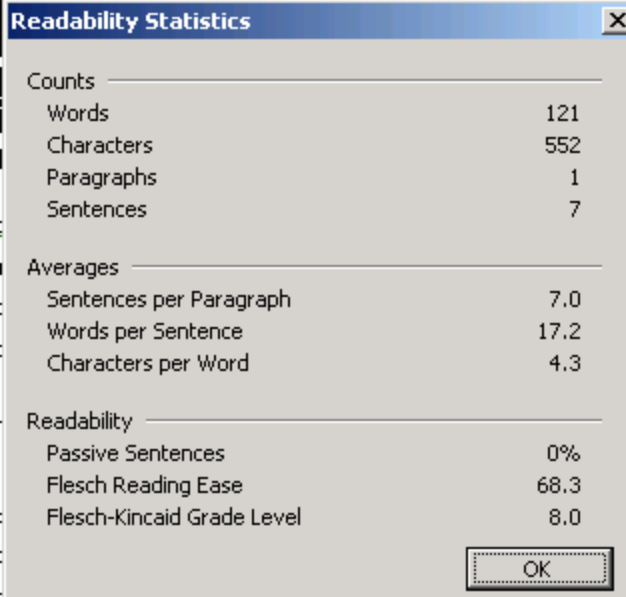
Five ways to achieve clarity:



## Five ways to achieve clarity:

1. Short sentences
2. Short words
3. Passive voice  $\leq 10\%$
4. Readability index  $\leq 10$
5. Minimal jargon and acronyms

# Let Your Word Processor Do the Work



The image shows a 'Readability Statistics' dialog box with a close button (X) in the top right corner. The dialog is divided into three sections: 'Counts', 'Averages', and 'Readability'. Each section contains a list of metrics and their corresponding values.

Counts	
Words	121
Characters	552
Paragraphs	1
Sentences	7

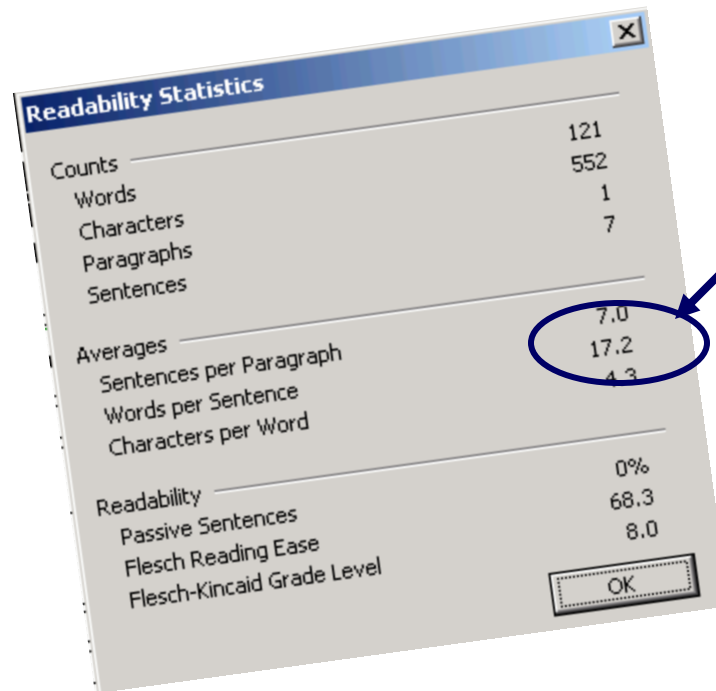
Averages	
Sentences per Paragraph	7.0
Words per Sentence	17.2
Characters per Word	4.3

Readability	
Passive Sentences	0%
Flesch Reading Ease	68.3
Flesch-Kincaid Grade Level	8.0

An 'OK' button is located at the bottom right of the dialog box.

# 1. Short sentences



Readability Statistics	
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Average sentence length

**15 to 17 words per sentence is a good average sentence length.**

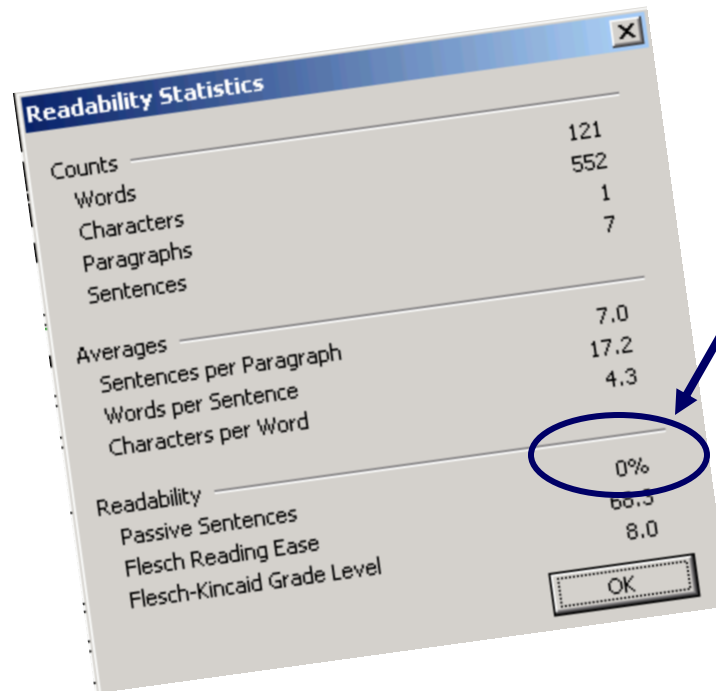
## 2. Short words

Readability Statistics	
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Average word length in characters

**5 characters or less means your words probably aren't too long.**

### 3. Passive voice $\leq 10\%$



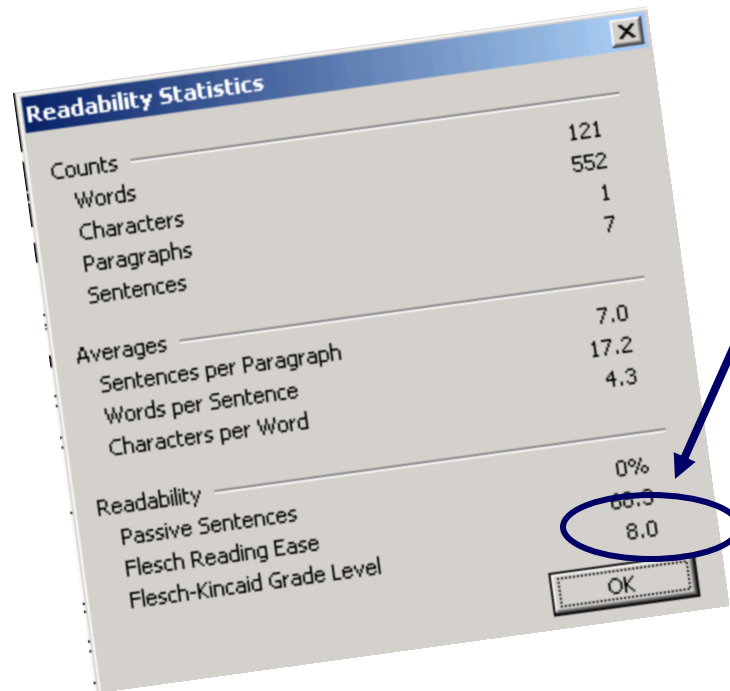
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Characters per Word	
Readability	0%
Passive Sentences	66.3
Flesch Reading Ease	8.0
Flesch-Kincaid Grade Level	

Percentage of passive voice

**Keep passive voice below 10%.**



## 4. Readability level $\leq 10$



Readability Statistics	
Counts	121
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Characters	1
Paragraphs	7
Sentences	
Averages	
Sentences per Paragraph	7.0
Words per Sentence	17.2
Characters per Word	4.3
Readability	
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Flesch Reading Ease	66.3
Flesch-Kincaid Grade Level	8.0

Readability scores

**Aim for a Flesch-Kincaid Grade Level index of 10 or less.**

## 5. Minimal Jargon and Acronyms



**Ask your mother.**

## Proposing to Win

✓ 1  
Get a NOSE Job

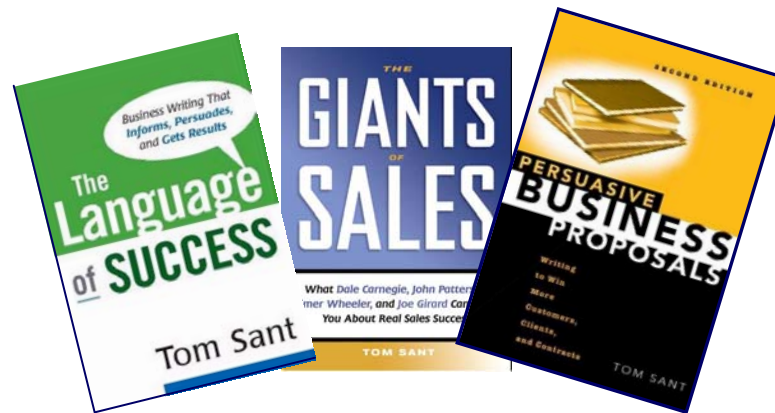
✓ 2  
Pack Your Case

✓ 3  
Show Me the Money

✓ 4  
A KISS for Luck

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**And good luck...  
in writing winning proposals!**



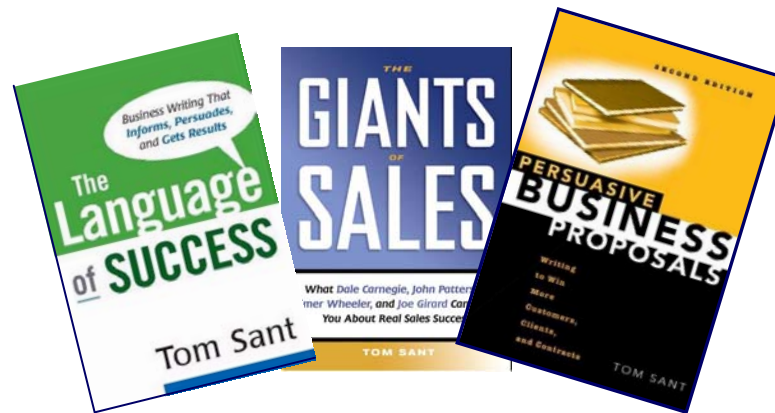
**Dr. Tom Sant**

**[tsant@hydeparkpartnerscal.com](mailto:tsant@hydeparkpartnerscal.com)**

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- 1. To receive my monthly proposal tip**
- 2. To get a copy of this presentation**



**Dr. Tom Sant**

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