

Beyond Pretty: How To Design An Effective Proposal

By Mel Lester

When I first started writing proposals back in the mid-1980s, adding a few graphics was a fairly radical concept. There seemed to be a widespread expectation that technical service proposals must be staid and boring – nothing but the facts, ma'am. Now, attractive layouts, color, and ample graphics are common features in our proposals.

But the proposals I've reviewed in recent years still lack effective design for the most part. While they are generally appealing to look at, they fail to meet the most important document design criterion – *function*.

Effective design goes beyond pretty; it facilitates better communication. Let me suggest a few design tips that will distinguish your proposals, not just in terms of their visual impact, but also in their ability to clearly convey your message(s) to your prospects.

Study The Design Of Top Mainstream Periodicals

You can learn a lot about preparing better proposals by studying magazines and newspapers because they are designed to convey information in the most efficient manner.

The best place to start is USA Today. This publication revolutionized the newspaper industry, in part because its design is based on perhaps the most extensive reader research ever. Another personal favorite is Consumer Reports.

In seeking design tips from mainstream periodicals like USA Today, don't just focus on appearance and layout. Consider how the publication functions, how it facilitates the communication process. You can get the gist of the day's news in just a few minutes.

Ask yourself: "How long does it take the reviewer to discern the main themes of one of my proposals?"

Understand How The Client Handles Your Proposal & Design It Accordingly

One of the most basic mistakes we make in writing proposals is assuming that someone will read the whole thing from front to back. That rarely happens.

Reviewers are typically looking for specific information in a specific order. They may turn to the middle of your submittal first, then towards the front, then towards the back. The easier you make it for them to find the information they're looking for, in any order, the better.

For example, when I used to prepare submittals for one branch of the Corps of Engineers, I knew what they looked for:

1. Their initial screening would take them first to the organization chart to learn who comprised the project team, (both individuals and firms).
2. They would then look at the ten projects we considered most relevant to the solicitation.
3. Next, they would check résumés to see if the people assigned to the team worked on the projects we highlighted.

Within a minute or two, they had an idea if we made the initial cut. Obviously, it helped to design our submittal accordingly:

- I used custom-printed tabs to help reviewers find the sections they were looking for quickly.
- I included information on the organization chart, (such as professional registrations,) that I knew they were particularly interested in.
- I boldfaced key words and phrases that would facilitate their review.

Understanding how they reviewed our submittal, I was able to design it specifically for their use. Consequently, we regularly made it to at least the shortlist.

Present Information At Two Levels: Skim & Read

Imagine sitting in the client's place, having to read a stack of proposals. Think they read all of them word for word? Think again.

One of my primary criticisms of the proposals I've reviewed is that they force the client to do too much reading. An effective proposal allows the client to skim for key information, and then read for more detail if he or she chooses.

Think about it: That's how publications like USA Today and Consumer Reports are designed. While I can get the news in less than five minutes, I can also spend an hour or more reading the articles in detail if I want. But I *don't have to* to get the most important information.

Highlight Your Key Messages At The Skim Level

Despite what the Request For Proposal (RFP) may suggest, most selection decisions will hinge upon just a few key issues. The goal is to highlight those issues in your proposal. (This assumes, of course, that you've uncovered these issues in your sales process.)

In developing your key messages, keep these guidelines in mind:

- *Identify no more than 3-5 key messages that you want the reviewer to remember from your proposal.* These form the core of your proposal content.
- *State each key message in a simple phrase.* If it takes more than a few words to express any of your key messages, it's probably too complex to be remembered.
- *Determine what supporting evidence should be provided for each key message.* Simply list this information at this point, before building it into narrative form.
- *Order this supporting information based on importance.* This is the journalistic principle of the "inverted pyramid." Start with the most important information, and then follow it with increasingly less important information. This facilitates skimming.

With the key messages defined, present them at the skim level. Put them in bold headings, supported by figures, bullets, simple tables, pictures and captions – using the same design principles that allow you to skim the news in your newspaper.

If you want to be really innovative, use headlines rather than the usual topical headers that are typically used in proposals.

Keep in mind that it may be several days or even weeks after your proposal is read before a decision is made. So you need to take steps to highlight the key points that you want reviewers to remember.

Always Include An Executive Summary

Unless the RFP specifically forbids an executive summary, use one. Studies indicate that summaries always get read, whereas other parts of the document may not be.

Depending on the complexity of the proposal, I generally advise allowing no more than 3-5 pages for your executive summary. It should incorporate the same design principles as mentioned above; make it an easy read.

The executive summary should be written by the best writer on your team. I prefer to do it last, after the rest of the proposal has been completed.

Write it like a stand-alone document, as if this was all you were submitting to the client. (Although references to other sections of the proposal are appropriate, don't make the reader turn elsewhere for key information.) It should represent a condensed version of your strongest selling points and should certainly highlight your key messages.

Some use the cover letter for this purpose, but I don't advise it. I'm not convinced that all reviewers read cover letters because they often are little more than transmittal letters. (At least, that's how I always wrote them.) An executive summary, on the other hand, won't be ignored.

Don't Dilute Your Proposal With Too Much Text

This is almost always the case with the proposals I've seen. They are commonly two to three times longer than they should be.

Providing more information doesn't strengthen your proposal; it weakens it. You should include no more text than necessary to make your points. The more volume, the more likely that the important content will get lost in the clutter.

As a proposal manager, I usually established page limits even if the RFP didn't. If the RFP set limits, I often decided to go still smaller. That forced me and other writers to cut the fat and get to the point. Clients appreciate that.

I once prepared a 30-page proposal, (our self-imposed limit,) for a \$30 million contract. The client said they were immediately impressed when they opened the box and saw a half-inch binder. Everyone else sent them two-inch binders. We won the job.

Don't make the mistake of assuming that more information makes you appear more informed. On the contrary, making your points with fewer words – illustrated with figures, simple tables, and captioned photos – makes you look smarter. And it keeps the information that really matters at the forefront.

Other Design Tips

The following are a few more simple proposal design tips to consider:

- Arrange content in a logical step-by-step fashion, describing a work process or ordering points according to importance.

- Illustrate the work process with simple flow diagrams, described in associated text. You look smarter when you can draw a picture of it.
- Consider adding at least one graphic element (photo, table, figure) to each page. That breaks up text and makes skimming easier.
- Present most information in bullets, with bold summary statements followed by supporting text. Once again, this aids skimming.
- Keep tables and figures simple. Break it into more than one if necessary to follow this principle. Overly complicated tables and figures are counterproductive. They're supposed to make the communication easier, not more difficult.
- Prepare your tables and figures first, before writing the associated text. If you can draw a picture of it or summarize it in a simple table, you're well along the way to being able to describe it clearly in words.
- Always include captions with your pictures. This really strengthens the value of including photos in your proposal.
- Use the inverted pyramid design throughout. For example, start Section 3.0 with a summary of the most important information in that section. Do the same in Section 3.1, and so on.

That's it. Follow these tips and you will put together proposals fit for the 21st century and not for the 1980s.

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