

# Chase Less, Win More: How to Produce Proposals and Presentations That Will Bring Your Firm Back to the Top

*By Frank A. Stasiowski, FAIA*

## It Starts with Your Strategy

Most A/E/C firms don't have good strategic plans. Yet an up-to-date, viable strategy will prevent you from wasting your resources on proposing for jobs that you probably won't get and that might not even be appropriate for your firm.

Your strategic plan should include:

- **A clear, short, simple statement of your firm's mission:** your focus, your uniqueness, how you provide value for your clients.
- **A business or strategic plan that everyone can understand.** Where are you now? Where do you want to be? How will you get there?
- **A strategy for change.** If you're not open to change, you won't grow.
- **A plan for penetrating new markets.**
- **A clear picture of the types of client and business you want to pursue.**

## Essentials of a Winning Proposal

A winning proposal:

- Focuses on the client's concerns, not the A/E/C firm.
- Shows a grasp of the big picture.
- Presents a clear, logical, responsible technical approach.
- Shows that the plan will work.
- Shows the competence and experience of the project team.
- Presents an attractive fee in relation to value.
- Restates the criteria for selection.
- Restates the client's needs and desires.
- Shows a clear link between the proposal elements and the evaluation criteria.
- Identifies how the firm will add value.
- Is readable, concise, attractive, and well-organized.
- Uses boilerplate creatively, if at all.

A losing proposal:

- Is hard to read.
- Is incomplete.
- Is packed with irrelevant statistics and exhibits.
- Is too long or too short.
- Is disorganized.
- Doesn't reflect the client's needs or wants.
- Doesn't address the client's issues.
- Lists features instead of benefits.
- Is full of boilerplate.

A winning proposal is the blueprint for completing the project. Many problems concerning budget, schedule, and scope of work relate directly to deficiencies in the proposal. Make it as specific as possible.

### **Essentials of a Successful Proposal-Writing Process**

Among the many elements in the process of creating a business-winning proposal, three are most critical to raising the winning percentage and lowering proposal costs:

**1. The Go/No Go Decision.** Here's where you evaluate whether you should spend your resources proposing on a specific project. Consider your strategic plan, your financial objectives, and the value of this client to your business.

**2. The IFBP analysis (Issues/Features/Benefits/Proofs).** Look at the project from your client's point of view. What issues does he really care about? How can you address these issues? The key is to show that for every issue, your firm has a feature. The feature brings a benefit that answers the issue. And you can prove it.

- **Issues (Hot buttons).** What few, basic issues are most vitally important to the client? What needs are most important to each person on the selection team? You won't necessarily get all this from the RFP: you'll need to use your marketing intelligence, too. Get inside the client's head!
- **Features.** What's unique about your firm? How does that differentiate you from your competitors?
- **Benefits.** How does each of your unique features address the client's issue? Why will the client see it as a benefit?
- **Proofs.** Where's the objective evidence of your features? Is it irrefutable by the competition?

**3. The Red Team Review.** Members of your firm that can think like the client analyze your draft proposal. Whether you have weeks, or only days, to complete a proposal, these elements should be part of the process. Adjust the scale of your proposal efforts accordingly. If the only opportunity you have for a Red Team Review is over lunch or in the boss's office, make the most of it!

### **Why Aren't Proposals More Fun?**

- You go after a lot of RFPs, even when you know you won't win the work.
- You use too much boilerplate.
- The wrong people write proposals.
- You don't have an efficient process for writing proposals: you prepare them on an *ad hoc* basis.
- You try to "bulk up" the proposal with standardized pages, unnecessary information, or untargeted writing.

## Essential Elements of a Proposal

Whether you're writing a major, complex proposal or a simple one with only a few pages—whether you're submitting on paper or electronically—you need to cover most of the same basic elements:

**1. Cover letter.** Generally, If you don't know the person you are addressing well enough to use their first name in the salutation of the cover letter, you have no business submitting this proposal. Follow PSMJ's "What, How, Why, When" formula for a winning cover letter:

- **"What."** Start with a paragraph showing that you understand their key issues and that your priority is to address those issues.
- **"How."** Next, talk about how you will solve the specific problem. This shows, or re-emphasizes, the benefit of your approach. Refer to proposal page numbers that offer more information. A selection committee member who has a favorite hot button will immediately turn to that page. You've captured his attention; you have him reading into the proposal.
- **"Why."** Promise more benefits—"How you will benefit from this approach," or "What you will get from this plan." Use bullets, each presenting a new benefit and referring to a page in the proposal.
- **"When."** Show your enthusiasm, that you're ready to get started. Tell the client you've set aside a specific week in which to meet if you are selected for an interview. Or say you've scheduled a design team kick-off meeting for a certain date. Promise to call within a short, specific time to go over details and see if they need more information (then do it). Thank them for considering you.

**2. Table of contents.** If your proposal is more than 10 pages long, you need a table of contents to guide reviewers through the proposal. Keep it short and concise. If the table of contents goes more than one page, you have too many items. Consolidate them.

**3. Executive summary.** In writing your executive summary, aim for two pages or fewer, certainly no more than four. Think of this as a stand-alone, condensed version of your proposal, designed for key decision-makers who might not have time to read the entire proposal. Assume you're explaining it to a non-technical, "big-picture" person.

**4. The project team resumé.** Throw out the boilerplate resumé. Re-build them to highlight the capabilities that each person brings to this specific project. When you do this, each resumé becomes a marketing statement, one more reason that the client should hire your team for this project.

**5. Scope and approach.** The description of the scope of services has three main elements:

- **Statement of Understanding.** Focus on two to four very specific needs or desires of the client. Briefly state how you'll fulfill the needs of the project.
- **Detailed Scope of Services.** Use a work breakdown structure to organize the large, complex, overall project into logical work packages, and then into detailed task lists. You

can assemble the packages on the basis of functionality, phase of the project, or any other basis that makes sense in this project.

- **Project Approach.** Tell how you'll fulfill the client's needs as expressed in the statement of understanding. While the scope of services describes what you'll do, the project approach describes how you'll do it. Be specific.

**6. Schedule and budget.** Clients measure the success of projects on the basis of schedule, budget, and deliverables. Always relate the schedule to calendar dates (not numbered days). A client's comfort is built on your level of confidence in your own methods and procedures for staying within (or below) the budget—list specific techniques you'll use for cost control.

**7. Fee.** You can lose the project on price. So make pricing a carefully thought-out and carefully-managed part of your proposal strategy. There are four basic types of pricing:

- **Firm Fixed Price**
- **Time and Material**
- **Cost + Fixed Fee**
- **Cost + Base Fee + Award Fee**

**8. Related experience.** Clients don't care what you've done. They want to know how you did it, what you learned, what you did that was special, or what you bring to their project as a result. You're not going to sell the client with endless pages of projects they know nothing about. Instead, choose five or six projects that are as close as possible in scope to the current one. Then list six or seven elements that address this client's hot buttons.

**9. SF 330 (for federal government projects)**

**10. Appendix.** Unless the RFP requires otherwise, put the following elements in the appendix:

- Insurance Certificates, Professional Licenses, Affidavits, etc.
- Financial Data on Your Firm
- Standard Client Forms or Questionnaires
- Resumés
- Reference Lists
- Firm History
- Philosophical Commentary
- Index

## **Writing and Graphics**

When writing proposals:

**1. Aim for a direct, active, friendly writing style.** Make it easy and enjoyable to read. Use terms your client uses.

**2. Edit for uniformity.** If different people write various sections of the proposal, have your best writer edit the whole document for style and tone.

**3. Keep it simple.** Follow the “3, 7, 11, and 10” Rule:

- No paragraph more than three sentences
- No sentence more than seven words
- No word more than eleven letters
- No paragraph more than ten lines

**4. Understand that graphics are mandatory.** Graphics add to the appearance, content, and readability of your proposal. They help you convey a large amount of information in a small space. Replace text with a graphic at every opportunity—provided that each graphic is clear, simple, and relevant, and that all your graphics work together to create an impression of professionalism.

**About Frank:**

**Frank A. Stasiowski, FAIA** is a counselor and advisor to CEO’s of many of the top design firms in the United States, Canada, UK, Australia and New Zealand. He is President, CEO and founding owner of PSMJ Resources, Inc. a global publishing, education, consulting and trade show company, dedicated to helping A/E/C firms reach their maximum business success.

As an advisor to A/E/C firms worldwide, Frank helps his clients by challenging them to excel, and by assisting them to solve their problems and management issues. He sees his role as one of helping clients generate alternative action options, explore the pro's, con's, risks and costs of those options, to provide a recommendation but, ultimately, to allow clients to make their own decisions guided by his insight.

Frank’s board of direction work involves long term strategic issues where Frank often has the client firm form an internal executive task force to develop bold new strategies. Frank serves as the guide and coach to that group helping them agree on action steps and a work plan, suggesting various forms of information collection and analysis, contributing to the generation of creative ideas, challenging his client’s thinking and guiding the process through to a conclusion....all aimed to position a firm ahead of its competition.

Among the managerial topic areas he works on continually are strategy, marketing, leadership, merger/acquisition, strategic alliance and ownership transition. In addition to his counseling work, Frank spends significant time making presentations and facilitating meeting discussions, planning retreats, workshops and training sessions, all to spread the word that the sole mission of

As a licensed architect with degrees from the Rhode Island School of Design plus an MBA from Bryant University with honors, Frank brings a special understanding and sensitivity to the issues facing design firm executives shaped by nearly 30 years dedicated to helping design firms excel.