

Writing Winning Proposals

Proposal Planner

Note: This Proposal Planner is designed to be used by Writing Winning Proposals workshop participants, either during the workshop or on future proposals. Add duplicate or blank pages at any step of the process when you need more space to write.

If you would like additional copies of this publication for future proposal work, call Shipley Nordic on +45 4540 4040 or visit our website at www.shipley.dk.

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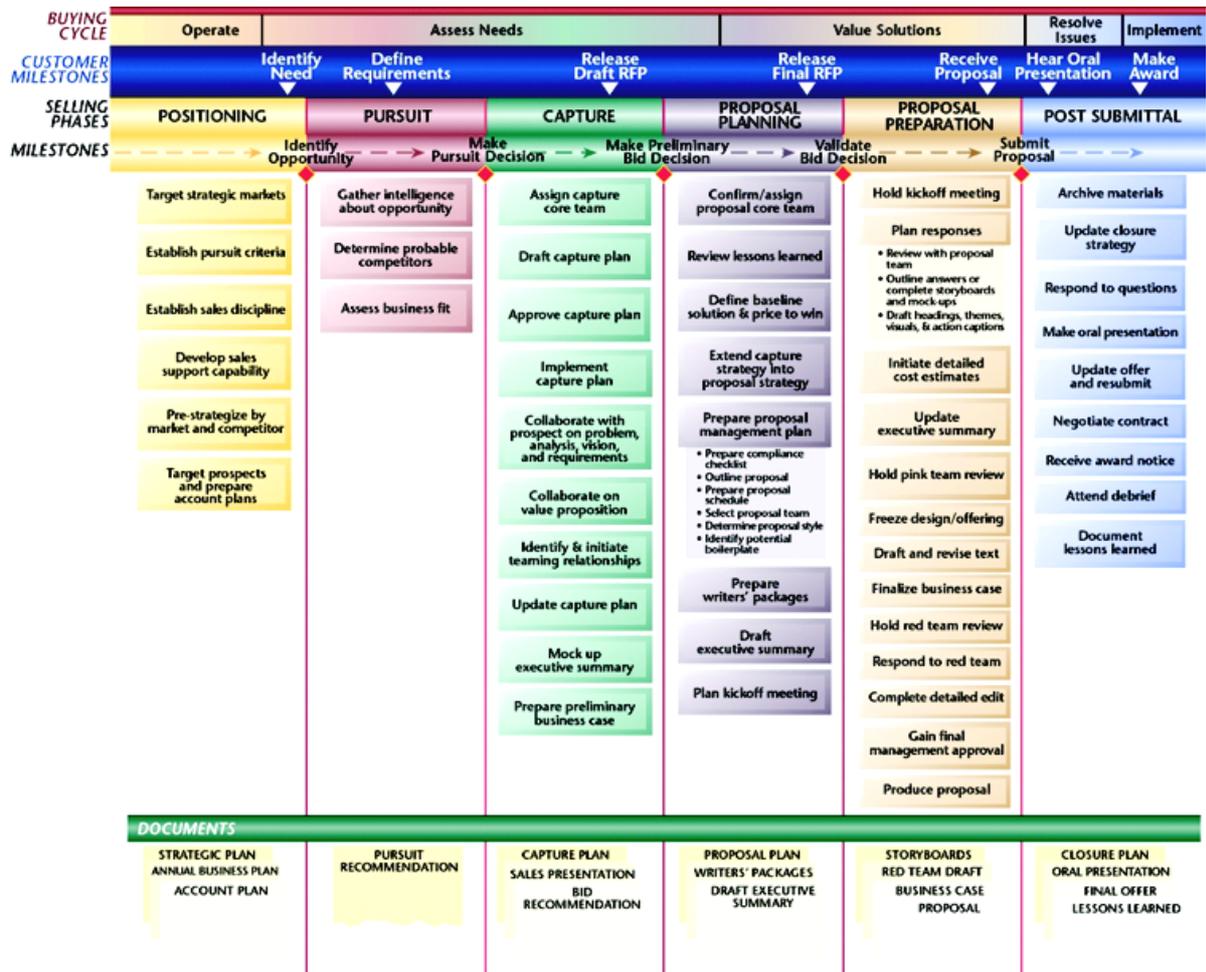
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Process Framework

This Proposal Planner is designed to be used by sales and proposal professionals to prepare their own proposals. Writing Winning Proposals workshop participants may use this tool during the workshop and on future proposals.

Process Framework



Allocating Proposal Time



Positioning the Opportunity

1. Identify Decision Makers, Influencers, and Their Issues

Complete the following:

Date: _____ Account Executive: _____
 Prospect: _____ Division: _____
 Organisation: _____

Opportunity: (Briefly describe the opportunity and need)

Role	Name	Position	Power	Issue	Importance	Power Rating
Decision Maker	_____	_____	_____ _____ _____	_____ _____ _____	_____ _____ _____	_____ _____ _____
Influencer	_____	_____	_____ _____ _____	_____ _____ _____	_____ _____ _____	_____ _____ _____
Influencer	_____	_____	_____ _____ _____	_____ _____ _____	_____ _____ _____	_____ _____ _____
Influencer	_____	_____	_____ _____ _____	_____ _____ _____	_____ _____ _____	_____ _____ _____
Influencer	_____	_____	_____ _____ _____	_____ _____ _____	_____ _____ _____	_____ _____ _____

2. Build a Bidder Comparison Matrix

- a. List the key client issues from the prior template in column 1. Consolidate common issues.
- b. Assume you have identified 100 percent of the client’s issues. In column 2, assign a weight to each **as you think the client would**. All weights must total 100.
- c. In column 3, jot down the rating the clients would give you today out of the total available points. If 20 points were available, how many would you be given?
- d. Add a column for each additional competitor. If you have numerous competitors, consider grouping them into types, then rate the group.
- e. Total the columns. Do the numbers make sense? Where are your assumptions weak? Revise until you are satisfied.
- f. In the last column, note the positive or negative discriminator that is the primary reason for the competitor’s rating.

Bidder Comparison Matrix				
Issues (a)	Client's Weight (b)	Us (c)	Competitor A (d)	Discriminator (e)
Total	100			

3. Draft Sales Strategy Statements

Effective proposal strategy statements indicate what you will do and how you will implement it in your proposal. Draft a sales strategy statement for each issue in the Bidder Comparison Matrix. Incorporate the discriminator associated with each issue in your strategy statement.

#	Issue	Strategy Statement	
		What We will	By • • •
#	Issue	Strategy Statement	
		What We will	By • • •
#	Issue	Strategy Statement	
		What We will	By • • •
#	Issue	Strategy Statement	
		What We will	By • • •
#	Issue	Strategy Statement	
		What We will	By • • •

3. Draft Proposal Strategy Statements (continued)

#	Issue	Strategy Statement	
		What We will	By • • •
#	Issue	Strategy Statement	
		What We will	By • • •
#	Issue	Strategy Statement	
		What We will	By • • •
#	Issue	Strategy Statement	
		What We will	By • • •
#	Issue	Strategy Statement	
		What We will	By • • •

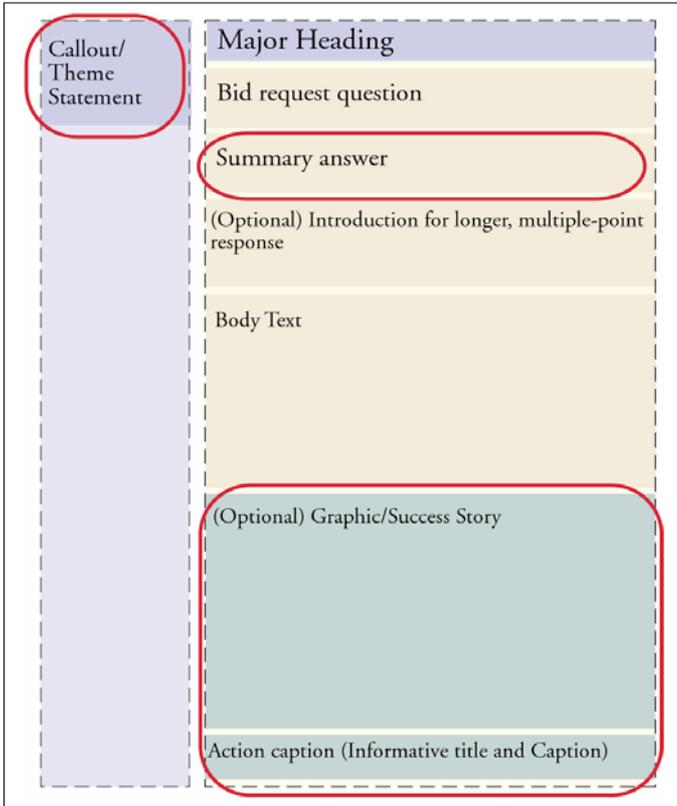
4. Develop a Proposal Outline, then the Requirements Checklist

(Exercise)

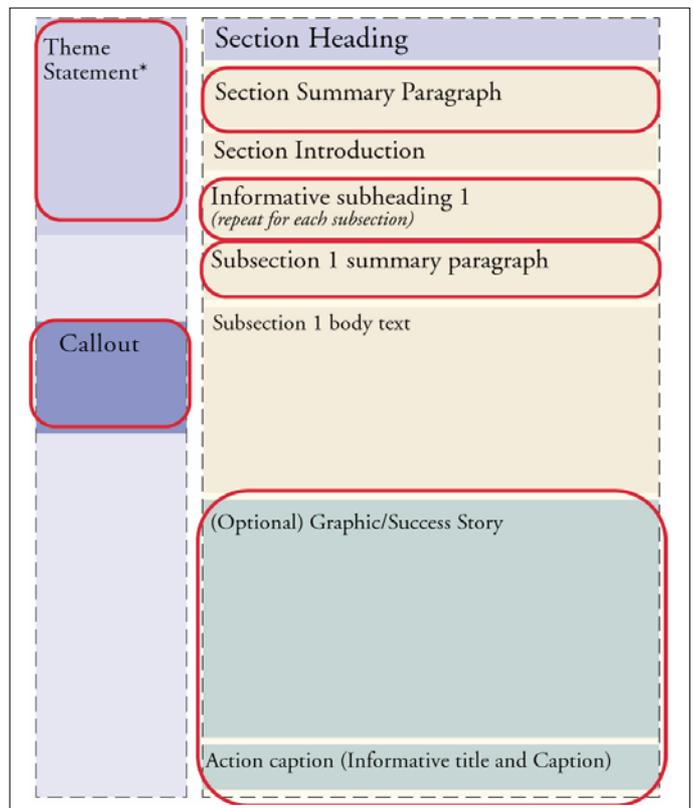
#	Section Title	Compliance Requirement

6. Design Your Proposal—Develop a Style Sheet

Select a style that will appeal to your client and that can be produced with your current systems. Consider the different styles offered below.



Question/Response RFP



Embedded Question RFP

Implement Your Proposal Strategy

Implement your proposal strategy in headings, themes, visuals, captions, and summaries.

Headings. Use the exact heading suggested by your client in the bid request. If no heading is suggested, draft **informative headings**, similar to a newspaper headline. Draft the headings for your section. (See “Headings,” *Proposal Guide*, pp. 63-66.)

Themes. Themes succinctly express the point you want the reader to remember. The best themes **link features and benefits** in a single, short sentence. Long themes usually make better section summaries. Draft a theme statement for your proposal section. (See “Theme Statements,” *Proposal Guide*, pp. 209-214.)

Visuals and Action Captions. Every visual should have an action caption that clearly makes a point without forcing the reader to read proposal text. We **recommend two-part captions**. Part 1, the **informative title**, identifies the visual and interests the reader in the caption. Part 2, the action caption, expresses the point(s) you want the reader to understand. Like themes, good action captions link features and benefits. Unlike themes, good action captions can comprise several sentences. Draft a two-part caption. (See “Captions,” *Proposal Guide*, pp. 1-5.)

Informative Title: _____
Action Caption: _____

Implement Your Proposal Strategy (continued)

Section Summaries. Draft a one or two paragraph section summary for each major section. (See workbook, p. Prepare-11.)

Section Introductions. Draft a short introduction, preview, or roadmap for each major section. Introductions list the topics to be covered in order. (See workbook, p. Prepare-11.)

What's Next?

Congratulations! You have completed the hardest part of writing a proposal. We suggest you keep the following steps in mind as you complete your proposal:

1. Review your draft and then ask one of your peers to review it. Use the following checklist. Ask them to suggest ways that you can improve your proposal, then revise as needed.
2. Red Team the proposal when possible. Red Team members should be familiar with the client and the client's requirements. Consider using the *Proposal Assessment Worksheet*.
3. Incorporate valid Red Team recommendations. Complete a final detailed edit. Print, package appropriately, and submit. Present your proposal personally when possible.