

Proposal Writing Checklist

Leon de Stadler

The vital aspects

1. Make sure that you understand your audience well - audience analysis is vital.
 - Who will be the primary reader?
 - Who will make the decision?
 - Who will influence the decision?
 - Different groups in your audience?
 - What culture or cultures do they belong to?
 - What institutional culture does the client company have?
2. Always remember that you are writing a *persuasive* document. Have you taken every opportunity to persuade your client?
3. The following vital elements of proposal writing should be accommodated in your text:
 - Understanding of the problem
 - Solving the problem (sometimes you can opt for a solution perspective rather than a problem perspective)
 - Evidence of your qualifications and capability (normally offered throughout the document)
 - Evidence of your own dependability (normally offered in separate section)
 - Presentation of a compelling reason to select and approve your proposal (normally this reflects on all aspects of document design)
4. You need to try and achieve a good mix of the three persuasion strategies:

- Logos: presenting well-developed arguments (especially in the sense that they should be complete)
- Ethos: presenting information on your company (market yourself)
- Pathos: presenting information on your client (demonstrating your understanding of the client's needs and problems)

Issues of content

5. A mistake that many proposal writers make: Offering incomplete arguments. You are writing on topics with a high level of consequential involvement and therefore an unsupported argument will cost you!
6. Do not avoid significant issues (such as pricing and precisely defined benefits) which apply to the problems or solutions simply because you are afraid that your information might not be totally accurate. It is better to take a stand than to avoid questions.
7. Do not assume that the reader is familiar with the topic. When in doubt add the explanation.
8. You may supplement your more logical arguments with more pragmatic kinds of argumentation (rules of thumb), such as the use of testimonials, examples, the consensus rule, etc.
9. Make sure that you offer content in such a way that it will draw the attention of the reader. Topics that seem to work well include solutions, benefits and pricing (Especially if it is good news!).
10. Depending on the needs of your client, you may find that content should be ordered in such a way that more important issues precede the less important ones.
11. Keep it short and to the point, but remember: don't be vague!
12. When you have research results to offer, do so. In a high consequential involvement case this actually helps to win the day.
13. Make sure that you do respond to the needs and the requests of the client. Failure to respond leads to frustration and alienation. Brief.

14. Use outline formats and lists to break long stretches of more narrative text.

Issues of coherence

15. Sequence content components in a logical manner so that there is a comfortable flow of thought.
16. Be generous with transitions and markers of coherence.
17. Check your paragraph structure: A paragraph has one topic sentence with the others supporting this topic sentence.

Issues of structure

18. Structure in this case refers to anything that the eye can see: titles, headings, subheadings, tables of contents, the index (if it is a long document), paragraphs, sections, chapters, footnotes, addenda, etc. They all act as entry-structures to your text and play one or both of two roles:
 - They have a structuring role, in the sense that they provide the reader with an idea of what the text is about.
 - They can also have a motivating role when they entice the reader into the text. This will happen if they are surprising in some way or another, or if they are predictable (in the more positive sense of the word, that is, the reader expects to find them).
19. Proposals should adhere to the following minimum requirements regarding their structure:
 - Executive summary
 - Table of contents
 - Glossary of terms
 - Situation analysis showing understanding of potential problems and needs of the client
 - Recommendation (including arguments on the benefits and value propositions)
 - Technical analysis (including arguments on the benefits)
 - Financial matters
 - Provisions and exclusions
 - Project management and implementation
 - Future plans

- Conclusion
- End-work

20. Number your headings (or at least the main headings). It makes referencing easier. You should not have more than three levels of numbering.

21. Decide on a stable heading format (levels, font types and font sizes, numbering):

- Develop a set standard for your institution/company

22. Make proposals easy to skim:

- Informative and interesting headings make it easy to see the broad outline.
- Set a topic sentence for each paragraph and support this topic with the other sentences in the paragraph. Take care not to make your paragraphs too long.
- Use white space to offset significant items.
- When comparing things, put them in a table so that the comparison becomes self-evident.
- Use bold to highlight important key-words or phrases (for instance in a bulleted list) but develop a pattern
- Take extra care when writing introductions and conclusions (for the whole text or segments of the text).

23. Make transitions smoothly. Transition points: between two sentences, two paragraphs, two sections, etc. Your instruments:

- clear references to link sentences
- clear references to earlier discussion
- clear references by repeating core concepts or key phrases
- linking words like conjunctions and pronouns

24. Do not confuse the reader by presenting information that belong together in different places in your document. A disjointed presentation can be very confusing and irritating.

25. Take care when using bulleted lists. If the list is too long it will lose its effects

26. Bulleted phrases can be stripped of punctuation: start with a capital letter but no full stops or other punctuation marks at the end of a line. Exceptions: When it's a full sentence or paragraph. But: consistency.
27. Do not use too many bullets. The mechanism then loses its effect.
28. Levels of importance in bulleted segments.

Issues of style

29. Proposals are formal documents and therefore need to be written in a more formal, businesslike style.
30. That does not mean, however, that the distance between the writer and the client should be too big. One way of counterbalancing is to address the reader (especially by using the word *you*) and by referring to yourself. This enhances the persuasive quality of a text.
31. Create a persona for yourself and your client by providing answers to questions like the following:
- Who are you and what do you have to offer? Your vision for your client? Your record of excellence?
 - Who do you consider the client to be? (even if it is an idealistic picture – clients like to be seen in a positive light)
32. Sometimes you have problems with the difference between a persuasive and a contractual style of writing. The latter is a more bureaucratic (“officialese”) kind of style and should be avoided in a proposal. A persuasive style is more argumentative and not as bureaucratic and formal as a contractual style.
33. Your text will be technical enough. Try to avoid unnecessarily difficult words (jargon) and difficult sentences (too long, lots of embedded sentence or phrases in one sentence, etc.).
34. Steer clear of empty marketing words or phrases.
35. Remember: Words and figures do not make a happy marriage. Rather present your figures in a table format.

36. Whenever possible, avoid using passive voice sentences (e.g. *The solution was developed by our technical team. Our technical team developed the solution* is better).
37. Avoid nominalizations (*the development of the solution*). Often a full sentence (*We developed the solution*) – even though it is longer – is easier to process and it makes the text more people-orientated.
38. Less is better: Kill your darlings! But, again: Avoid vagueness.

Issues concerning lay-out and graphics

39. Is the graphic supported by text or does the graphic support the text to improve understanding?
40. Is the graphic coherent with the surrounding text?
41. White spaces are important, but take care not to have too much.
42. Justification can be a problem: Uneven spacing between words make for difficult reading.
43. Line-spacing: If it is too much it creates a disjointed effect.
44. Fonts do actually create a style: Serif is more formal and sans serif more with-it.
45. Use bold, italics and underlining sparingly. Text in caps is difficult to read.

Minimum requirements for the executive overview

46. The executive overview should, as concisely as possible, provide answers to the following questions:
- What is the proposal about?
 - The most important recommendations?
 - Who will do the job?
 - What must be done?
 - What's in it for us?
 - When?

- How?
- The cost?

47. The executive overview is an instrumental document: It should support an executive manager in making a decision.

48. It does not have the full proposal within its scope: You should not summarize everything in the proposal.

49. It must be short. Executive overviews longer than two pages are not appreciated!