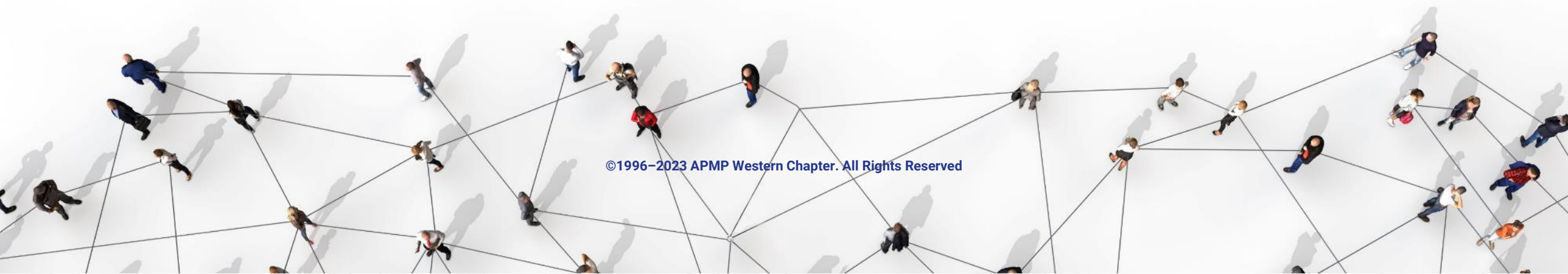




How to Not Write Proposals Like an Amateur

Dick Eassom, CF APMP Fellow
Vice President, Corporate Support, SMA, Inc.



What is our job as a Proposal Professional?

To win in today's competitive environment, we must

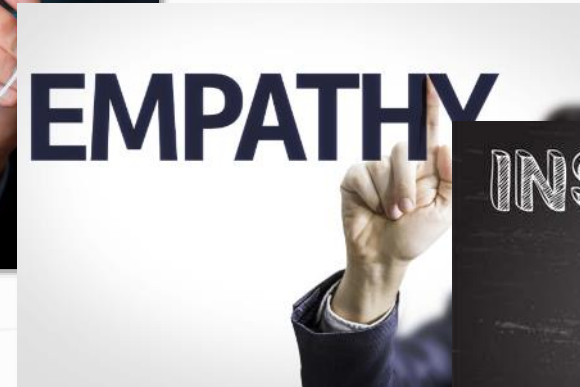
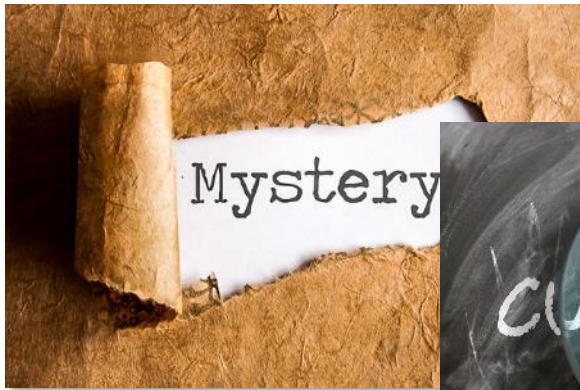
- Pursue a distinctive and compelling win strategy (“why us”), that is expertly executed in capture, and convincingly documented in the proposal
- All three conditions are necessary; no single one is sufficient to win

Our job is to express our win strategy in the proposal by

1. Transferring knowledge
2. with few interpretive errors
3. that creates long-term retention
4. to persuade the reader to pick us
5. and relieve them from boredom

To accomplish these five steps

Our writing must engage the reader on a journey from



What we must do as authors

As authors, we have the burden of logical reasoning and must provide a clear path from facts and data to understanding and persuasion:

- If the reader must draw their own conclusions, we have left the door open for interpretative errors and have created frustration

Evaluators read our proposals based on four levels:

- Our narrative must capture complexity and nuance while communicating insights clearly and concisely
- Graphics should inform and take the reader each step of the way down our path of logical reasoning

Are we amateurs?

- So many things can go wrong when we write proposals:
 - Our writing style can be bloated and self-centered leaving the reader to **not liking you**
 - The words we use can be cryptic and abstruse leaving the reader **confused**
 - The syntax we use can be convoluted and ambiguous leaving the reader to **guess at our meaning**
 - The sequence of sentences and paragraphs can be disjointed and choppy making the reader **miss the main idea and tune out**
- We tend to write in a style and manner we have honed over years just like our signatures, and we **continue to do so out of habit even though** we are aware that we may not be achieving our objectives of clearly informing, conveying judgment with persuasion, and inspiring the reader
- So, are we amateurs? Recent research suggests the smarter you are, the more likely you are to act irrationally and write like an amateur

Our job is really, really, really hard

Because it's hard, we easily fall into the temptation to

- Focus on the deadline over the story
- The process over the content
- Using what we've written for others
- Writing to ourselves instead of the customer

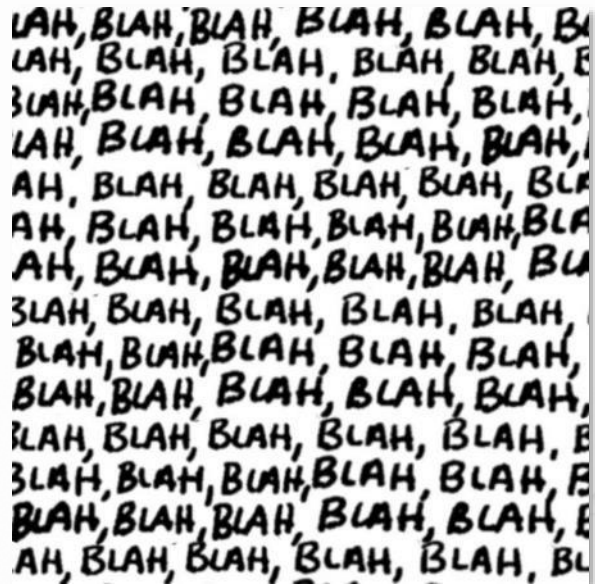


The real reason is not because it's hard...

- Instead, the real reason that we sometimes write like amateurs is because of the **Curse of Knowledge**
- This curse makes it near impossible for us to think like communicate with the evaluators

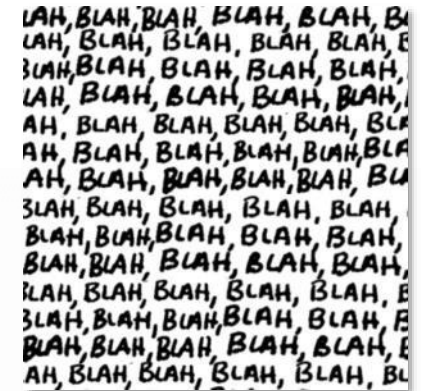
The four traps of the curse of knowledge

Studies have concluded that 30% of GDP is linked to persuasion; but rather than persuade, business communication has become devoid of any meaning because of four traps:



The obscurity trap

- Pride leads to **Jargon**: we try to impress versus inform, but end up using jargon and terminology the reader doesn't understand
- Purposeful Obfuscation (or MSU) leads to **Bloat**: we fear using concrete language—creating evasiveness instead of persuasion—to manage risk/liability or it's simply because we don't know what to write, so we end up writing too much creating turgid mush
- Apathy leads to **Romanticizing**: we don't know how to make the topic exciting since we don't understand its importance to the reader, and our writing ends up gratuitously glamorizing ourselves or the client without substance
- If we focus on informing over impressing, we can avoid falling into the obscurity trap



The anonymity trap

- Laziness leads to **overuse of Templates and Pre-canned Material**: you believe that what worked before will work again, even though you know that the customer is not the same and may have different objectives
- Lack of preparation and win strategy leads to **Stating the Obvious**: you don't know the customer well enough to differentiate your offering, but you still believe that you will win, simply "because"
- How do you know when you have become anonymous? Replace your name with any of your competitors' names and the proposal is still believable
- Your business personality is a part of why customers buy from you: If your proposal doesn't reflect your business personality or is inauthentic to it, your customers will see right through it
- Deliver a message you care about, and "own who you are," and you can avoid falling into this trap



The hard-sell trap

- Lack of confidence leads to using **Superfluous Phrases**: we're not sure why the customer should select us, so we make up for it with redundant self-praise
- Fear of losing leads to **Empty Promises**: we erode trust by offering promises that are not credible or have no value or meaning to our customer
- How do you know when we're selling too hard? When there is nothing left in the proposal after we remove all the self-aggrandizing words and phrases
- If we don't know our **Value Proposition**, which is all about our customer—not us—then all we can do is offer empty promises and superfluous writing
- Use **Feature** (what makes us different) – **Benefit** (why you should care) – **Evidence** (why you should believe us) to avoid falling into this trap:
 - Use Benefit – Feature – Evidence in the executive summary to get to the point quickly
 - Use Feature – Benefit – Evidence in the detailed sections of the proposal to help create coherent logic in the narrative



The tedium trap

- No customer intimacy or clear win strategy leads to **Tedious Generalization**: we don't know what is of interest and that differentiates us competitively, so we write generalizations that are truisms but of little meaning to the reader
- How do we know when we have fallen into the tedium trap? When we end up asking the question “so what, what was the point of the story?”
- Genuinely care about the customer and connect with them by making it clear we understand their needs and issues
- Weave the story of “why us” through the proposal or our proposal will fade into mediocrity—we want to make it easy for our customer to decide
- Use pertinent facts and details to make the story come to life and use “magic words” that create intrigue and capture the reader’s attention. “Magic words” help change minds, engage the reader, and drive action by turning actions into identities, turning should into could, converting plausibility to certainties, and conveying timidity into confidence
- Ghost our competitors to prompt the reader to ask questions about them



We've got to have a process!

1 | Start with defining a design requirement

Module Specification

2 | Create a layout drawing and plans

Story Map

3 | Then illustrate the project to explain it

Art Development

4 | The next step is to create the prototype

Annotated Mock-Up

5 | Finally, you prepare the detailed drawings

Module Draft

Don't start writing yet! Create an Annotated Mock-Up (AMU)

Thesis Statement (from Annotated Outline) should be 35 words or less and summarizes:

Annotated Mockup

3. Technical Approach

3.1. Proposal Leadership

SMA's proposal management team provides the leadership to produce a winning, strategy-driven proposal in a cost-effective manner employing JIP-like management approach, featuring continuous reviews throughout the proposal process.

- Client and SMA responsibilities
 - Winning vs. executability
 - Reviews
 - Coaching and mentoring
 - Metrics
- Leadership provides cradle to grave management of their proposal
 - Win strategy & baseline
 - Partnering with client
 - Core team
 - Figure 3-1 highlights leadership
- Provide leadership that orients group behavior toward winning
 - Develop and communicate plan
 - Team integration

Our strategy-driven process and seasoned experts minimize your win potential

- 40 years of proposal leadership success and 500 proposals worth over \$400B
- 93% win rate on all multi-million-dollar programs
- Structured proposal development process drives quality and consistency into the proposal
- Process enforces configuration management

Figure 3-1: Dynamic tension results in effective proposal leadership

Provided by You: Program Manager (Advocate for a doable program), Chief Engineer (Advocate for Technical Excellence)

Provided by SMA: Proposal Manager (Advocate for winning)

Advocate for winning: Strategy, Plan, Process, Schedule, Products

Advocate for Technical Excellence: Minimum requirements compliance, Metrics selection, winning plan

Technical: Schedule, Cost, Risk

Page 1

Draft artwork represents message we wish to convey

Table, row and column headers minimum necessary for AMU

Annotated Mockup

3.1.1 Planning the Proposal

- Proposal Manager role
 - Win advocate
 - Enforce win strategy
- Volume Lead role
 - Art review & approval
 - Mentor & coach
- Production Manager role
 - Establish template and palette

3.1.2 Content Definition and Design

- SMA team takes ownership of the proposal products
 - Emphasis on responsiveness of evaluation
 - Tell "why us" story
- Figure 3-2 highlights structured process

Win Strategy

- Proposal baseline driver
- Drives themes

Story conferences with Module Specification and Story Map

Figure 3-2: Proposal leads, use products to orient and focus development of content

Process Step	Responsibility	Products
Strategy development	Core team	Win Strategy Strategy action plans Top themes
RFP analysis	Core team	Updated Win Strategy
Burnt RFP	Proposal Manager & Volume Leads	Module structure Author assignments Page annotations
Annotated Outline	Volume Leads	Key messages Volume themes Art concepts Cross-reference matrix
Module Specifications	Volume Leads & Authors	Module scope Module layout concept
Story Maps	Authors	

Page 2

Bulleted essence points represent paragraphs and content allocated to each page (short and punchy; no sentences)

Define central message statements for each paragraph

Annotated Mockup

3.1.3. Proposal Reviews

- Proposal development process
 - Writing easier
 - Management review and control
- Iterative review process
 - Story conferences; Management Reviews; Formal Reviews
 - Incrementally build quality
 - Ensures compliance
- Story conferences
 - Figure 3-3 callout
 - Data evolution

Training and coaching

- Organize thoughts
- Management Reviews
- "Test market" story
- Elicit suggestions
- Baseline evolution
- External Management Reviews (Pink Team and Red Team)
- Be customer
- Incorporate review comments
- Structured process
- Deliberate decisions
- Audit

Figure 3-3: Story conferences and formal reviews enforce continuous improvements.

Frequent reviews enforce continuous improvement on each module.

First Story Conference: 100% Compliance

Last Story Conference: 100% Compliance

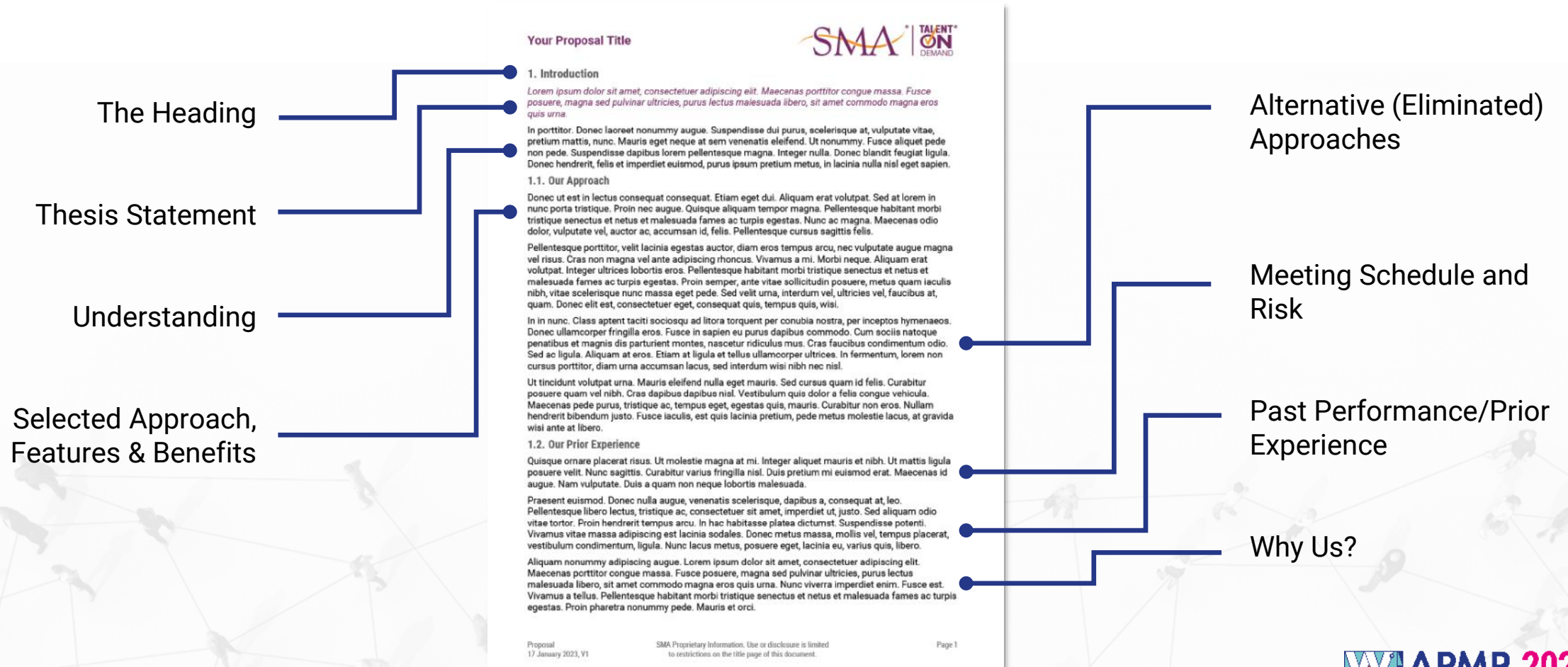
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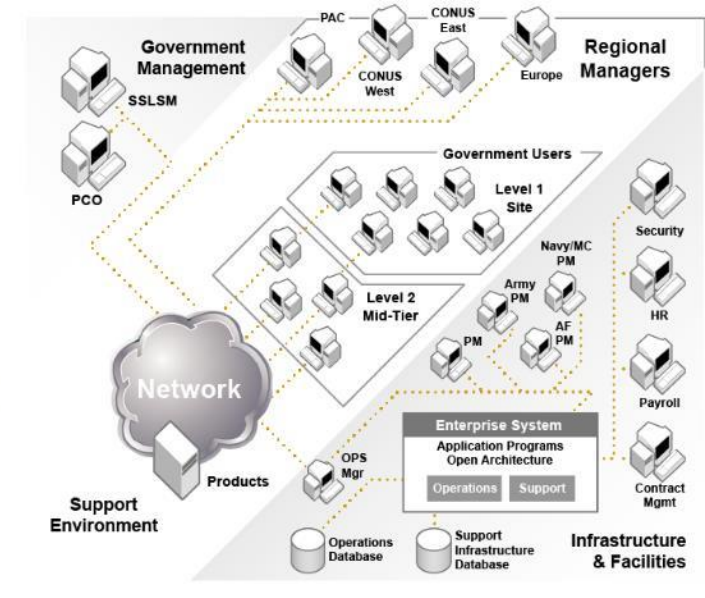
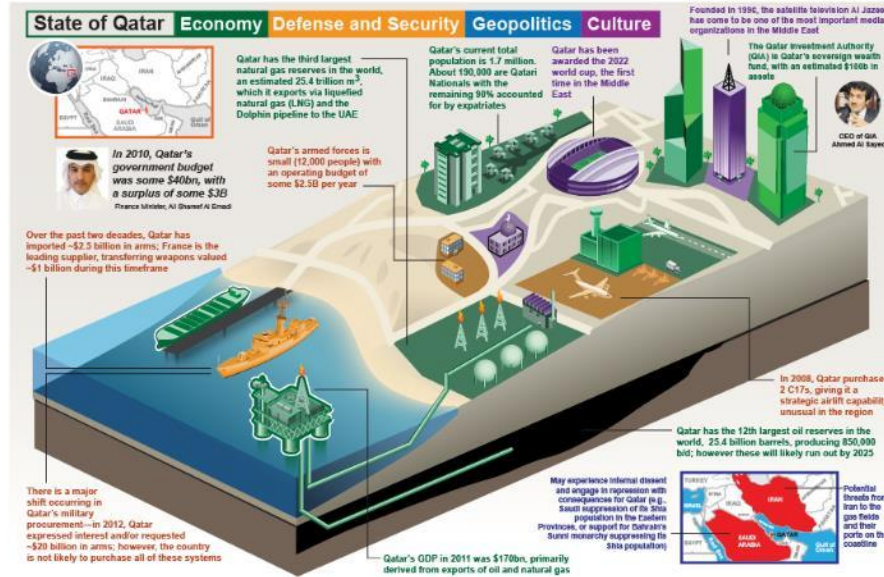
Page 3

Write the art, don't illustrate the text

We'll need a structure



Use graphics to tell complex stories





**Our job is to effectively communicate
with every reader!**

- Skimmers
- Text-oriented
- Graphics-oriented
- Detail-oriented

- **Determine what you are trying to do with the graphic... then design it**
- **Start with the Action Caption**
- **The goal is to have at least one graphic on each page**
- **Focus on a single message per graphic**
- **Identify photographs you need to tell your story—don't just make existing photographs work. Get photograph requests in early**
- **Get help from your Proposal Manager if you are having difficulty**

Action Captions—what's the message?



*The classical
"horse chart"
caption – All title,
no content*

Figure 1. A horse



*An action caption
stating the intended
message of
the graphic*

*Figure 2. The horse offers an
off-road transportation capability
without requiring fossil-based fuels*

What type of graphic to use?

Choose the appropriate type of graphic:

- 1. Focus Boxes:** top-level overview of the benefits of your approach and supports claims with facts and data
- 2. Flowcharts and organization charts:** sequential or reporting relationships
- 3. Graphs:** relationship of two or more variables and how those variables change
- 4. Illustrations and diagrams:** give substance to conceptual objects and provide a level of detail that photographs cannot begin to show
- 5. Maps, plots, plans, and layouts:** topographical relationships, including scale and distance
- 6. Photographs:** convey realism and authenticity; show you have already built it!
- 7. Tables:** explain comparisons, trends, and technical detail

Our work control system and commitment to total quality produced an enviable 5-year record

- 99.9% on-time contract delivery
- Work control system data integrity
- Inventory accuracy better than 99%
- Real-time access to status
- 117 satisfactory customer surveys, Baseline Subsequent (B-SAR) conducted June 19
- 100% satisfactory Air Force

Inputs

- Customer system requirements
- Proposed baseline concept

Task 1: Baseline system requirements (SOW 4.1.1)

- Subtask 1.1 (SOW 4.1.1.1) Develop preliminary system requirements
- Subtask 1.2 (SOW 4.1.1.1) Develop preliminary test plans and procedures

Program SOR	Performance Metric	CRM Response
Timely Staffing = New <90d	Timely Staffing = repeat <30d Attrition = <10%	<ul style="list-style-type: none"> • Web based tools, Headhunter • Enhanced referral • Priority staffing by days open • Monetary/Non-monetary awards • Track "Overstaff" effectiveness
Qualified Candidates	100% Technically Certified Workforce	<ul style="list-style-type: none"> • Site inventory to certifications • Resume match to specification • Web-based tools
Cleared Candidates	Applicants date less than 3 years	<ul style="list-style-type: none"> • Electronically submit • Manually submit
Subcontractor Support	20% of work to be performed by Subs	<ul style="list-style-type: none"> • Track % of work being performed • Evaluate partner performance

Five keys to writing style

Use the First Person

Using the first person is more conversational and makes for an easier and more friendly read

Use the Present Tense

Pointing out that “we design,” “we build,” “we test,” and so on, is more compelling than saying “we will”

Be Positive

Stating things in a positive context and not using conditional statements conveys your confidence

Avoiding Stilted Phrases

A friendly writing style is conversational, quantified, and is not rife with superlatives

Use the Active Voice

This helps make your prose more believable, more direct, and more self-confident

Make your messages clear



Short words, big messages



So, how's it looking?

How good is your proposal?

- Does it respond to the requirements and implement the win strategy?
- Does it SELL?
- Did you prove every claim?

Will the reader be able to answer these questions?

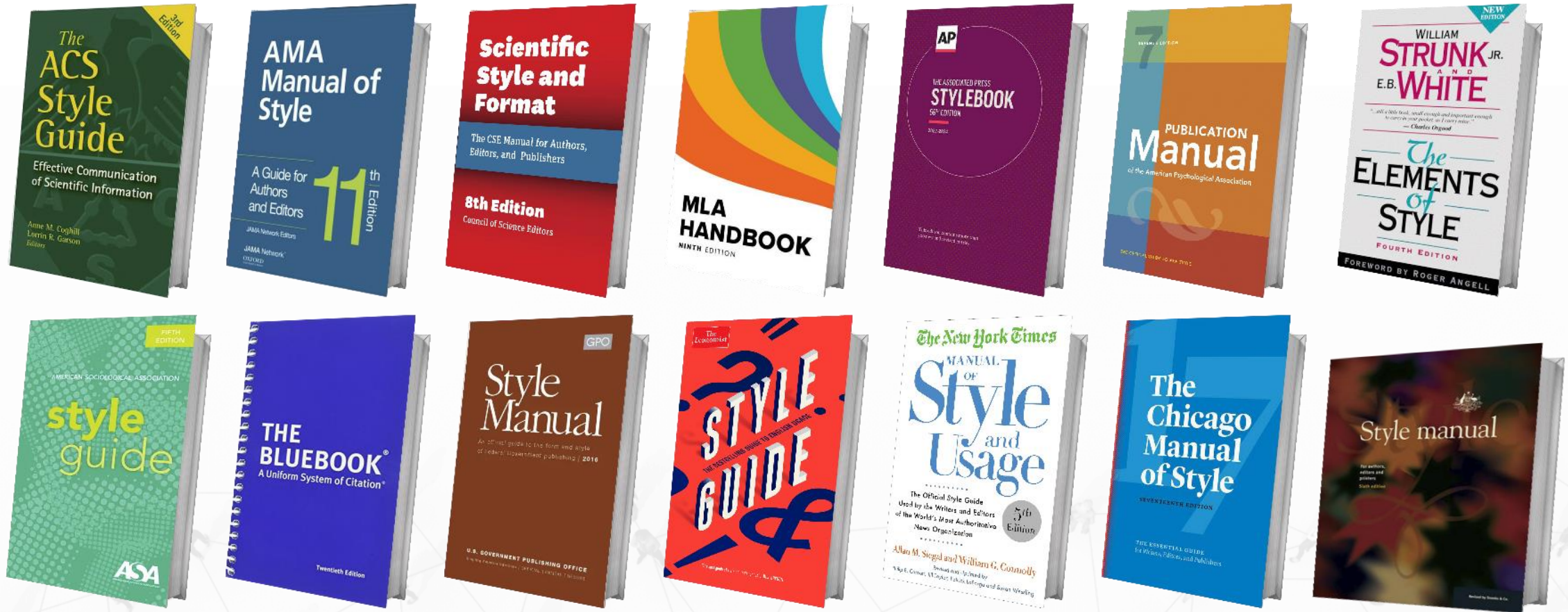
- What are you offering?
- How is it better?
- How are you going to do it?
- How is that better?

Why should the customer believe you?



You can download our 7 Cs as a wallchart by scanning the QR code in our “SMA Way: A Style Guide for Proposal Writers” book

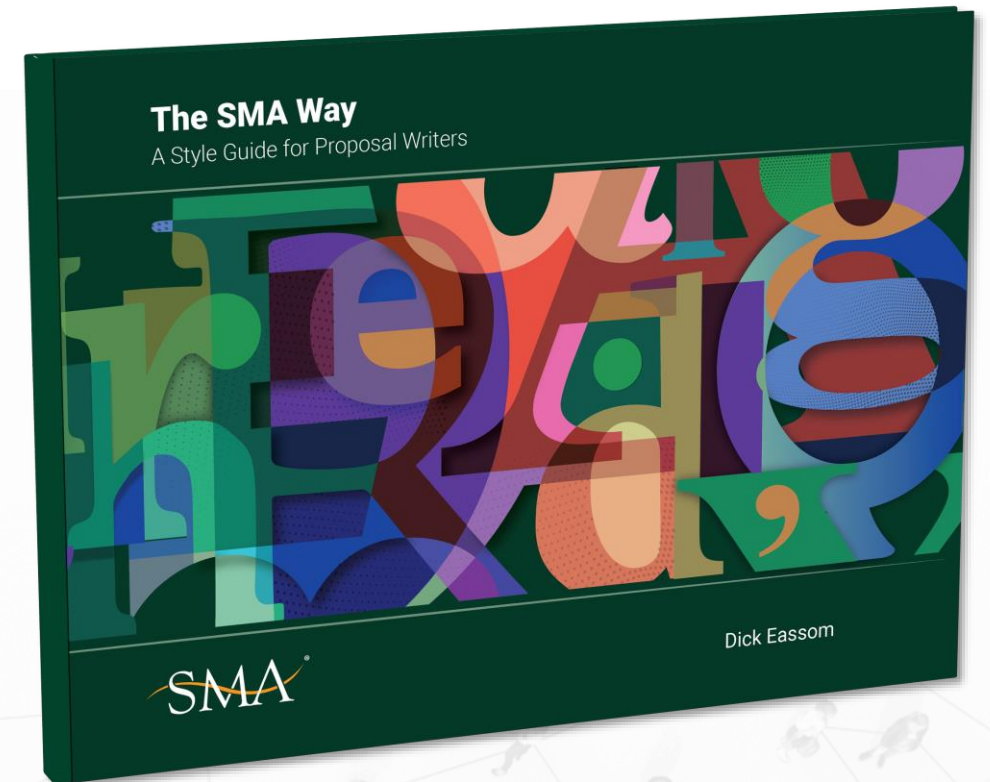
So, why write a style guide for proposal writers?



Any questions?

dick.eassom@smawins.com

<https://smawins.com>



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