

Beyond Pretty: How To Design An Effective Proposal

By Mel Lester

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.

- 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