

WINNING PROPOSALS: NINE STEPS TO A BUSINESS DEVELOPMENT COUP

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October 2009

In today's market, opportunities are scarce and the competition is fierce. When a request for proposal lands in your inbox, you need a top-notch strategy, in-depth intelligence and an all-out campaign to make your proposal a winner. A smart game plan can give you an edge.

LAUNCH

Step 1: Pull the trigger (or not). In a tough economy, it's tempting to chase every opportunity that comes along. Resist that temptation. Instead, consider whether the project fits your company's capabilities, business model and bottom-line objectives. Ask yourself these key questions:

- > **Can you do the work?** Can your existing staff handle it? Will you need to staff up or partner with another firm? Can you pull together a team in time to develop your proposal?
- > **Can you win the work?** Who's the likely competition? What strengths can you leverage against them? If you submit, would you rate your proposal a shoo-in or a long-shot?
- > **Do you want the work?** Is it a good fit? Will it be profitable? Will it enhance your reputation? Will it help you enter a new market?

Be honest. If the assignment isn't for you, save your time and energy for another opportunity.

Step 2: Start the countdown. The moment you decide to "go," chart all the mileposts in preparing the proposal, from assembling the team to packaging the final product. Counting backward from the delivery deadline, allocate time for each task. Add extra time, especially if you're submitting with another firm, and leave a buffer for contingencies.

Step 3: Mobilize the team. Forge whatever partnerships you need to round out your team. Establish roles and responsibilities for everyone, and communicate them clearly. Determine who will spearhead the project, gather information, draft content, develop budgets, design the document, produce and deliver it. Critically important, assign someone — better still, a team — to review the final document front to back while you still have time to make changes. Touch base at intervals to make sure the team has everything covered and no vital requirement has fallen by the wayside.

Briefing

- > **Carefully weigh the go/no-go decision.**
- > **Research the client and the competition.**
- > **Focus on how you can benefit the client.**
- > **Follow the rules set forth in the RFP.**
- > **Make your proposal easy to read.**
- > **Make every proposal better than the last one.**

INTEL

Step 4: Conduct intelligence. If you're not already familiar with the prospective client, find out all you can about the organization, the project and the goals behind it. If you've worked with the client before, find out what's new. Ask what other firms got the RFP and how yours was selected to receive it. Scout out the strengths and weaknesses of the other players. (Conducting regular competitive audits will save you a step here.) Attend any pre-bid conference. Caution: Some proposals set rules of engagement for how you may contact the prospective client. Play by the rules. They're especially important with public agencies, but even with a private company, an unsanctioned call can disqualify your proposal.

Step 5: Push the hot buttons. Determine the ultimate decision-makers in the selection process and learn all you can about their preferences. Read the RFP carefully; it's full of clues if you know how to find them. Note any areas where you're confident you can outperform your competition. Above all, focus on the client and the tangible benefits you can deliver. If you've gone through a branding and positioning process, you're ahead of the game. When you've worked out your key messages, put them front and center in your cover letter and executive summary.

ROLLOUT

Step 6: Hone the message. Share your key messages with all team members contributing content to the proposal, and speak with one voice. Decide whether to write the proposal in first person (we, our) or third person (the firm, the joint venture). Agree whether to refer to the prospective client as "you" — less formal but more engaging — or "XYZ Corp." Having a style guide for your company saves time and promotes consistency. If you're submitting with other firms, use the same template for all company profiles, bios and project sheets, and read through every page for consistency.

Step 7: Take the scan test. As much time as you put into your proposal, the reader may take only seconds to give it thumbs up or thumbs down. Long stretches of dense text can work against you. To make the proposal reader-friendly, lay out the pages with enough white space to let the eye rest. Then focus the reader's attention where you want it, using subheads, callouts, bullet points and graphic elements to highlight key messages.

Step 8: Follow the marching orders. At many organizations, especially government agencies, reviewing proposals begins with a compliance audit. Someone sits down with a stack of proposals and weeds out any documents that deviate from the RFP's checklist. Great, creative thinking can land in the trash because the addenda were labeled 1 through 5 instead of A through E. If you decide to organize your proposal differently than the RFP specifies, include a matrix clearly showing where every required element appears in your proposal — and understand you're taking a risk.



ENDGAME

Step 9: Debrief. Win or lose, after each proposal gather your team to review lessons learned. Include everyone from the top of the org chart to the people in charge of production and delivery. Ask what went right, what went wrong and how you can do better next time. While the experience is fresh, you'll get good ideas and a head start on your next win.

Having a solid game plan in place can move more proposals to the win column. Many companies work with a marketing team to help them set up a system and polish major proposals. More importantly, your marketing team can help you raise your profile with key industry players *before* they issue their RFPs — because receiving the RFP is the most crucial step in winning any proposal.

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