

The smart approach to proposal writing.

*An enquiry is a heaven sent opportunity,
so why is it sometimes hell to convert them?*

'We would like a proposal.' Complimented and hungry those 5 little words can set us off on a race which in many cases we never really had a chance of winning. Here are a few thoughts which could save you a lot of time and money.

In the first years of my marketing business I used to run the team and sell in the day and write all the proposals at night, after my son Stefan had been put to bed. With gathering weariness, I often looked at some of the opportunities on my desk and asked myself 'what are the chances of winning this?' I then started asking questions which gave us a far better idea of what we were up against. The quality of our proposals changed dramatically too. We also learnt how to say 'thank you but no to those which were clearly just a waste of time.

This process was developed into a weighted score card which gave a score to every answer and a higher score to the most important ones. If the opportunity gained a pass mark we proposed if it didn't we declined. Did we turn down opportunities we could have won? Probably! However, we also saved a huge amount of time, money and sorrow and our win rate was better than 2.1. By eliminating the poor potential we were able to focus all our efforts on the good.

Here are some of the factors we evaluated. I hope they get you into the habit of asking more questions about your next proposal opportunity and even daring to say NO if the answers do not stack up. None of them is new and all of them are obvious but as with most things we can always do with a gentle reminder.

- Budget - How often have you heard 'we do not have a budget' or 'just tell us what you think?' It is important to understand that whatever they say they have a figure in mind. Everyone has some idea of cost for the things they buy and marketing managers are no different. Putting forward YOUR idea of a budget rather than THEIRS is a fool's game, especially when you can easily find out the type of money they have to spend. The lack of this information was a 'no no' as far as we were

concerned and we would not progress without it. By the way there are ways of getting them to declare their budget which work 9 times out of 10. If you do not know these ask me and I will tell you how.

- Why you? - how did your name get on their pitch list? This is very important as it has a direct influence on your chances of winning. There is clearly a huge difference between being picked off a list in PR week or having a latent relationship with the contact. Was there something you offered or said on your web site which particularly interested them? If you can find out what it is, then you can feature it in your proposal
- How many – I am not a gambling man but I do understand odds. At the very most we would be one out of four competitors in the race. Any more than that and we would decline starter's orders. Not only were our chances of winning reduced by the numbers in the game but the prospect can easily be on a 'fishing trip' looking for ideas with few of their own. Also they can't have a good reason for having lots on the list and you might just be there to make up the numbers.
- Relationship – put simply do you have one? People most often buy from who they know and although they might be looking for a fresh face it is often the old one which gets picked in the end.
- Incumbent – who (if anyone) has the business now and how long have they had it. This line of questioning also allows you to ask what they liked best and least about what they are providing. With this information you can then give them more of what they like and say how you are going to avoid the mistakes of the current agency. Also ask how often they have changed agency and why? We do not want to be one of the many ex agencies of this client.
- Decision maker – not only do we want to know who the decision maker is – and we have ways of testing this – we also want to talk directly to him or her – not a marketing assistant – worthy though they might be. Without direct contact preferably

face to face with the MAN who has the Means Authority and Need we would seldom put pen to paper. How is he or she going to make a decision in our favour on a proposal from someone they have never met and engaged with?

- Timescale – the clearer the timescale the greater the likelihood of intent. If this is coupled with an event – exhibition or product launch then even better. Vague ‘next year’ ‘sometime’ ‘never’ is not a good sign. If there is a key date by which things have to happen their decision making will be timely too.
- Customisation– a prospect should read a proposal and feel it was written just for them and not just for anyone. How do you achieve that? Again by asking questions. What is the objective, what specific result do they want, what are the messages how would they describe their audience etc etc. The technique is to record the answers very carefully and then quote their words precisely (not approximately) back at them. My that sounds comforting and familiar– well it should be– they said it in the first place.
- The brief – we would seldom respond to verbal briefs. If the prospect has not set time aside to write even one side of an A4 about what he or she wants, then how can they seriously evaluate your proposal? Also, with such a sloppy approach they would probably be a nightmare of a client. Remember if they are a pain to pitch to they will be a pain to work with.
- Distinction – what can we add which really hits the mark? If we can’t think of anything and just put up a general programme we will probably get the result we deserve. If we are stuck for ideas we can always research the market and feed back to them their current image and reputation and propose how we will change it. People love hearing about themselves, as long as you have a good solution to the issues.
- Experience– we are in the age of the specialist and unless we can match their requirements with a specific relative experience and resource it is unlikely we will win as generalists.

Oh and before you think this is all too intrusive and far too many questions, I would suggest that this could be just your fear of engagement talking. In my experience, good qualification sets the professionals apart from the amateurs. Remember the performers who will 'strut their stuff' for anyone at the drop of a hat, seldom gain respect.

I am sure you ask some of these questions, although it is unlikely you will ask them all. It is also essential you keep asking the same question in different ways until you do get a satisfactory answer and not duck the issue. Beware of writing a proposal based on your assumptions not their answers. It is your time and effort which is at stake here. If you follow these simple techniques your proposals will be winners. You will also save valuable time by not chasing the losers.

ACTION

Here are some simple steps you can take to improve your chances of winning your next proposal.

- Circulate this to those in your organization who are engaged in business development
- Ask the questions and use the answers
- Review your experiences
- Let me know how you get on

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