Material Imprimible

Redacción de correos electrónicos, informes y propuestas comerciales

Módulo 4

Contents:

- Categories of proposals
- Preparation considerations
- Analytical reports
- Letter of transmittal
- Executive summaries and abstracts
- Title page
- Table of contents
- List of tables and figures
- Introduction
- Current situation
- Project plan
- Qualifications
- Pricing section
- Conclusion
- Terms and conditions
- Back matter
- Informal proposals

Proposals

Proposals are documents drafted to present ideas and plans to readers while business proposals are written by companies for companies to offer a product or service to a specific client.

Categories

Proposals can be categorised as:

- internal or external
- solicited or unsolicited
- informal or formal

Internal and external proposals

Internal proposals are written to be used in the same organisation where the writer of the proposal works.

External proposals are written for a business different from the organisation where the writer of the proposal works.

Solicited and unsolicited proposals

Solicited proposals are written in response to a proposal or RFP, a request for quotation or RFQ or an invitation for bid or IFB, issued by a company or government agency.

Unsolicited proposals are written on the initiative of the offeror and are sent to clients who have not requested them.

Informal and formal proposals

Informal proposals range from two to four pages and they may be written as an email, memorandum or letter. In the last case, they are sometimes called letter proposals.

Formal proposals are usually written for external readers. Internal proposals are formal when a formal issue or concepts is covered.

Formal proposals include more components than informal ones. In addition, the writing style and the tone should be formal.

Preparation

Important considerations

Especially solicited proposals are written in relation to a problem or an unsatisfied need. Therefore, the writer should do research to understand the client's needs, expectations and concerns as well as the causes and effects of the current situation the prospective client is experiencing.

The purpose of the proposal should be clear to the writer as that fact will aid then in being focused when writing the proposal.

Other readers, apart from the one who solicited the proposal, should be taken into account.

The proposal should explain how you will deal with the situation, add value and have a positive impact.

Offerors should review their trajectory and relate their past experience to the challenge the client is faced with.

In some cases, contacting subject matter experts for advice and insights will be necessary.

Writers should assess the type of information readers will need to come to a decision.

Afterwards, the material that offers a visual perspective to the proposal should be chosen.

Checking competitors' solutions and fees may be considered to refine the proposal.

Readers

- Decision-makers decide whether a proposal will be accepted. Take into consideration evidence, arguments and the financial aspect of the proposal.
- Advisors or secondary readers are usually interested in the technical aspects of the proposals.
- Tertiary readers are those who may have an interest in the project, for example, journalists, community activists, local people, etc.
- Gatekeepers are people in your company, such as your supervisor, lawyers, technical staff, etc., who will examine a proposal before it is sent to the prospective client.

Structure of formal external proposals

Formal external proposals usually follow the following structure:

- The front matter includes a cover, a letter of transmittal, a copy of the RFP, if applicable, an executive summary or abstract or both, a title page, a table of contents, a list of tables and figures
- The body usually includes introduction, current situation, project plan, qualifications, costs and benefits, conclusion
- The back matter may include appendices, a list of references and a glossary

The order, name and number of components may vary and this structure is intended to be considered as a guideline.

Letter of transmittal

Letters of transmittal go with important documents and they are used to tell the addressee:

- What the proposal is about: name of the proposal, main features, main benefits and a time list for its acceptance
- Why the addressee received the proposal. If it is an unsolicited proposal, explain how you learned about the issue. If it is a solicited proposal, state that it responds to the RFP issued by the client.
- Who prepared the proposal: brief information about the potential supplier and about the person who wrote the proposal.

The letter of transmittal should start with the writer's contact information followed by the date and then the receiver's information. Additionally, the letter should finish with a proper formal closing.

Request for Proposal

If the proposal is solicited, it is convenient to include a copy of it as large organisations may have more than RFP in circulation. This will help the reader know which RFP the proposal responds to.

Executive summaries

Executive summaries could be considered as a tool for selling since their objective is to persuade a potential client that the company sending the proposal is the right choice and that the solution put forward is the right one. They are prepared for people who may not have time to read the entire proposal or who may not be interested in reading everything.

The language should be persuasive and it should not exceed two pages.

The elements of executive summaries are:

- The issue, in other words, the need or problem to be addressed
- Background information and analysis
- The ideal outcome or result of the proposal
- The solution
- Evidence that the company sending the proposal has enough expertise to deliver on time and on budget
- A thank-you line for the opportunity
- Readiness to be in charge of the challenge or a call to action

Executive summaries and abstracts

Executive summaries are written for managers and abstracts are written for technical readers.

Title page

It should include

- The name of the proposal
- Information about the prospect: name, position and organisation
- Information about the offeror: name, position and organisation
- Date of submission

The offeror's logo and some visual content may be added.

Table of contents

It should show a list of headings and subheadings with their corresponding page numbers.

List of tables and figures

It shows a list of tables and figures included in the proposal with their corresponding page number.

Introduction

It introduces the issue and explains the purpose of the rest of the proposal. The usual elements are:

- Background information.
- The subject of the proposal and its importance.
- The purpose of the proposal.
- The main point or claim of your proposal.

- Forecast of the organization of the proposal.

The three basic elements that should be present are subject, purpose and main point.

Current situation

This section covers:

- The issue (= problem, need or opportunity). The problem statement should be articulated clearly so that the offeror shows they understand the issue. If a client does not know about the issue, this section will be used to educate the client.

- The causes of the issue. The purpose is to show the prospective client that the issue is understood by the offeror.

- The effects of the issue if nothing is done to address it. The purpose is to persuade the prospect that if no action is taken to address the situation, it will worsen.

Project plan

This is the section where the solution is presented to the potential client. This section should:

- Mention the objectives of the project plan. Those objectives entail rectifying the present situation or seizing an opportunity. If the proposal is solicited, the objectives should be based on the RFP.

- Indicate the solution and its advantages. The solution should meet the objectives indicated before. The scope, that is, what the proposal will cover, should be indicated. Some companies also include a list of requirements, such as access to reports or programs.

• Describe the major and the minor steps. For each of the steps, indicate what you will do, its purpose, how you will do that, timing and deliverables.

• Identify deliverables or outcomes.

• Provide a timeline or schedule. The first one is graphical representation of a period of time on which milestones are depicted. Alternatively, a schedule showing how long the different activities of the plan will last may be prepared.

This section is usually the longest.

Qualifications

This section, which may be also called staffing or why us, among other names, should cover information about:

- Description of the offeror's company: potential provider's credentials and what makes it unique and different from rivals. The purpose is to convince the prospect that the provider is capable of taking care of the plan. This section usually starts with a description of the offeror's organization, history, mission, vision and organisational structure, among other possible elements. There should be a connection between the company's story and the potential client's needs.
- Description of key personnel who will be part of the project. The purpose of including this information is to persuade the potential client that professional and seasoned staff will be running the project. Short

biographies of key employees could be included. CVs are usually placed in the back matter.

- Description of the offeror's previous experience. Offer testimonials, awards, past successes, among other evidence that enhance your credibility and earn the prospect's trust.

Vocabulary for the description of the company

- Vast, considerable, comprehensive, sound, thorough, deep, detailed and profound, extensive knowledge.

"We have extensive knowledge of geophysics".

- Handle, carry out, run, manage a project.

"We are uniquely qualified to handle this project".

- Considerable, unrivalled, valuable, wide, extensive experience.

"With a reputation for effective and fast solutions, we have extensive marketing experience to satisfy your needs".

- Address, fulfil, meet, satisfy needs.

"We build and apply customized financial management plans that satisfy our customers' needs".

- Deliver, offer and provide services.

"We have delivered best-in-class customer services for over 10 years".

- Apply, enforce, provide, maintain, sustain and implement standards.

"We apply the highest standards in transparency and business ethics".

"We hold ourselves to the highest ethical standards".

The pricing section

This section may be called costs and benefits, your investment, return on investment, project estimates, services and fees. The reason for choosing these names, instead of the word "pricing", is to induce prospects to consider the services offered as an investment rather than a financial burden. Sometimes a list of due dates for payments is included.

A breakdown of costs indicating different items, their unit price or rate or fee per hour, their quantity, subtotal and total is usually included.

Useful phrases for the pricing section

- To indicate how fees are charged:

"Our fees are billed at an hourly rate".

- To talk about the budget:

"We estimate the yearly budget for our consulting services at the following rate".

"Costs for this project have been itemized in the budget provided in Appendix B".

"The table below details our standard services rates".

- To indicate the total cost of the project:

"The total funds required are estimated at $50,000".

"We propose a total price of $50,000 for this project distributed as follows".

- To inform clients how often bills will be issued:

“You will receive a monthly invoice detailing the services provided and the number of hours devoted to each activity”.

- To indicate when payment should be made:

“Payment is due upon receipt of invoice”.

Conclusion

It is the last part of the body of the proposal and the last opportunity to persuade the prospect to accept your proposal. This is the place to:

- Reiterate the solution
- Remind the reader why that offeror is the best choice to take care of the project
- Thank the potential client for their consideration of the proposal
- Indicate the next step
- Include the writer's contact information

Terms and conditions

This section is written to remove ambiguity about the execution of a project. Some of the typical elements included in this section are scope and duties, specifics of the project, price and payment methods, liability, etc.

Some companies prefer to wait until the proposal has been accepted before they send the terms and conditions, which are usually part of a statement of work or SOW.

This section is usually reviewed by the legal department before it is submitted to the client.

Back matter

It contains supplementary information in the form of a glossary, as list of references and appendices.

Appendices

Appendices contain information that clarifies or supplements the body. Each appendix shoul start on a new page and be identified with a title and a heading.

Some of its possible components are: CVs of some of the key employees, statistics, promotional materials, photos of your products, case studies.

Informal proposals

They are between two and four page long and they are written and they typically take the form of a letter. The usual sections are: introduction, current situation, project plan, qualifications, pricing section and authorisation. The authorisation, also called request for approval, is an easy and simple way of asking the potential client to respond and accept the proposal. It restates the major benefits of the proposal and encourages readers to take action. Sometimes a deadline for approval of the proposal is included together with a retainer. If signed, the proposal becomes binding.